



NASIG Newsletter

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PRESIDENT'S CORNER

Char Simser, NASIG President

Give them something to think about.

That's from advice about great speeches. Ignore the fact that this isn't a speech (let alone a great one), just my first president's column. But still, by the end of this page I hope to leave you with something to think about.

Wow. My first president's column. Let me extend greetings to returning members and tell our newest members that you've made a great decision to join NASIG. We have a strong tradition of excellent conferences and just celebrated our 22nd in Louisville, Kentucky, at the end of May/early June. In the coming months you will hear from the Conference Planning and Program Planning Committees with their plans to amaze us in Phoenix, Arizona, where we gather next June. NASIG has been – far and away – the most valuable conference for me, and I'm not saying that because I just took on the president's reins this year! I learn something new at every conference and though no one has figured out how to nail the serial or e-jello to the wall, the innovative and creative ideas presented at NASIG always energize me.

This year's conference also gave us some time to reflect. Board members listened thoughtfully to the information conference attendees and NASIG members brought to light during the brainstorming discussions (<http://nasignews.wordpress.com/2007/09/05/223-200709-22nd-conference-2007-brainstorming-session/>). As I mentioned in my initial e-mail to the list after the conference, we wanted *you* to guide the discussion that asked, "Why is it difficult to get people to run for executive office of NASIG?" I hope you will find time to read the notes from the board's post-conference wrap up meeting (<http://nasignews.wordpress.com/2007/09/06/223-200709-22nd-conference-2007-post-conference-board-wrap-up-meeting/>) and the July conference call (<http://nasignews.wordpress.com/2007/09/06/223-200709-executive-board-minutes-2/>) in this issue of the *Newsletter*. The board IS paying attention! I think you will see evidence that we are responsive to your questions and have identified a number of items that we can address in the short term.

The entire board supports seeking ways to simplify and create transparency in the organization's processes. One of our goals this year is to implement enhanced technology options, including a robust membership database that will ease our conference website set-up and registration processes and facilitate online voting. This has the potential to open up the elections process in the future in ways we cannot do in our current paper-centric environment. I will add a plug here: *do* consider running for the board! It is a great education to see how the organization works, to get an in-depth understanding of budgeting, decision-making, and committee interaction, and to help formulate a vision for NASIG. So nominate yourself or someone you know! A form is available at <http://www.nasig.org/members/forms/nomform.html>. If you don't make the ballot, use our petition process!

The brainstorming discussions and wrapping up the site selection survey kept me busy in June and July and I only mention this because members have asked about the time commitment required of officers. I'm not sure we can predict what issues may surface in any given year that demand our time and attention. I have been on the board (as guest, ex-officio, and as vice president) for five years and rarely recall the level of communication being quite so

high immediately after our annual meeting. I have logged an average of about an hour a day on NASIG business since early June, though some days it's been 2 hours and other days 10 minutes. I have had many weekends completely free! (Now I'd like to hear some committee chairs chime in here! I imagine many chairs put in similar hours. I know I worked at least that much as *Newsletter* editor, though the hours were much more concentrated at certain times of the year. I often put in 10-15 hours in the week prior to publication of the html and pdf versions. I loved what I was doing so I never saw it as a burden.)

The months ahead look busy, too. Beyond the day-to-day activities as president (consulting with the board and committee chairs on the "regular" business of NASIG), I fully expect to contribute some time and energy to implementing the technology RFP, revisiting the strategic plan (<http://www.nasig.org/public/strategicplan03.pdf>), and moving forward with financial planning. That last item allows us to look at opportunities for paid staff (mentioned during the brainstorming) while providing contingency funds. As noted by former president Steve Savage:

"The key to financial health is stability and predictability of income and expenses, not luck. We've been extremely lucky, so far, that our conferences have not been affected by a major health concern (such as SARS), suspension of airline service over a wide area (as happened on Sept. 11 and 12, 2001), a major natural or manmade disaster at a conference site, or any other unforeseen crisis." [link: http://www.nasig.org/newsletters/newsletters.2004/04dec/04dec_presidents_corner.html.]

While some have called for us to tone down the organization's activities, to keep costs down, to reduce reliance on volunteers in order to avoid burn-out, please take a second look at our objective for a NASIG on a more firm financial footing. I am a firm believer that this is critical for NASIG's future. We would love to hear your solutions! We are listening! Contact us through comments on the blog, to email via the NASIG list or to the board at board@nasig.org, or directly to me at csimser@ksu.edu.

Now the question remains.... did I leave you something to think about?

NASIG EXECUTIVE BOARD MINUTES

MAY MEETING

Joyce Tenney, NASIG Secretary

Date: May 30, 2007, 8:15 a.m.-3:22 p.m.
Place: Galt House, Louisville, KY

Attending:

Denise Novak, President
Char Simser, Vice President/President-Elect
Mary Page, Past President
Joyce Tenney, Secretary

Members-At-Large:

Rick Anderson
Adam Chesler
Katy Ginanni
Kim Maxwell
Alison Roth
Bob Schatz

Incoming Board Members:

Jill Emery
Peter Whiting
Anna Creech
Jeff Slagell

Ex-Officio Member:

Kathryn Wesley, *NASIG Newsletter*, Editor-in-Chief

Guests:

Angel Clemons, Co-Chair, 2007 Conference Planning Committee
Rachel Frick, Co-Chair, 2007 Program Planning Committee
Sarah George, Co-Chair, 2007 Program Planning Committee
Tyler Goldberg, Co-Chair, 2007 Conference Planning Committee

1.0 Welcome (Novak)

Novak called the meeting to order at 8:15 a.m.

2.0 Secretary's Report (Tenney)

2.1 Approval of board actions since January meeting

Minutes of January 19, 2007 Executive Board meeting approved. (3/5/07)

Board approved financial support for OVGTSL Conference in the amount of \$1,000. (4/2/07)
Minutes of April 4, 2007 Executive Board conference call meeting approved. (4/27/07)
Executive Board voted unanimously to have the 2007 *NASIG Proceedings* dedicated to the late NASIG Treasurer, Rose Robischon, and to have a moment of silence before the treasurer's report at the annual business meeting. (5/4/07)
(Note this was later changed to have the 2006 *NASIG Proceedings* dedicated to Robischon.)

2.2 Action items from January meeting

The list of pending action items was reviewed and updated.

3.0 Treasurer's Report (Novak)

3.1 Report from Treasurer

Novak reported that the official NASIG PO Box is being moved from Georgia to West Seneca, New York. Whiting is working on this and will let us know when the process is complete. Novak reported that she is going to suspend the Financial Development Committee. Novak is willing to serve on the committee if it is needed at a later date.

The password for the NASIG website will be changed after the conference and the Electronic Communications Committee (ECC) will make an announcement on NASIG-L. Creech noted that ECC had put a button on the NASIG website for "Forgot login information? Contact us" that goes back to ECC. It has been used several times and seems to working well.

Novak reported that the donation box on the membership renewal form was a great success. \$4,075 was donated by NASIG members. This money is earmarked for the scholarship fund. Several ideas were discussed to develop an appropriate mechanism for thanking donors and acknowledging their contribution to NASIG.

ACTION ITEM: Treasurer will look at ways to get an acknowledgement system in place for the

dues donation program and will bring suggestions back to the board.

Novak noted that she will be training Whiting on the duties of the treasurer over the summer and will get all of the official documentation transferred. All passwords for the financial systems will be housed with the treasurer and secretary. It is important to have an official backup of passwords and documentation.

Novak and Simser noted that there is an error in the Bylaws in the term of the treasurer-in-training and treasurer. The intent of the amendment was to have the total term for the treasurer be three years, not four.

ACTION ITEM: Bylaws committee will be asked to look at this issue and report back to their board liaison.

Novak announced that the memorial for Rose Robischon will be on June 16, 2007 at West Point. A donation will be made in Rose's name on behalf of NASIG.

Novak has ordered an updated version of Quicken for Whiting. Ginanni inquired about the frequency of an official audit for NASIG finances. Novak noted that NASIG is audited yearly.

3.2 2007 Budget and Expenditures to Date

Novak reported that NASIG is looking very financially sound. Several committees are under budget at this point, but additional bills may be coming before the end of the year.

3.3 2007 Conference Report

Novak reported that the conference registration looks good. She reported that the conference calling system is working well for several committees and has been a successful way of moving committee work forward without face to face meetings.

4.0 Program Planning (Frick, George, Simser)

4.1 Status Report

Frick reported that the number of attendees for the preconferences was excellent and that all seems to be well with the program for the conference. She thanked all of her committee for their hard work over the past year. The board

joined in thanks to the committee for an excellent program.

5.0 Conference Planning Committee (Clemons, Goldberg, Roth)

5.1 Schedule, Events, Venue

Goldberg reported that all is well with the conference. The logistical portion of the conference is set and looks good. The board thanked the committee for a great job and for all of their work over the past year.

5.2 Conference Budget

Goldberg noted that there were 546 registrants for the conference and the budget should be easily met. The board discussed ideas for increasing attendance at future conferences and will continue the discussion in later meetings.

6.0 New Committees (Maxwell)

6.1 Library School Outreach (Maxwell)

Maxwell discussed the activities of the Library School Outreach Task Force. The task force recommended that to progress with their work it would be beneficial to have full committee status. After discussion of the merits of this proposal and the need for measurable goals, Schatz moved to grant the Library School Outreach Task Force committee status. Anderson seconded the motion. The motion passed unanimously.

ACTION ITEM: Simser or Emery will send a message out to NASIG-L asking for volunteers for this committee, in consultation with current task force chair and board liaison.

6.2 Membership Development Committee (Maxwell)

Maxwell reported on the work of the committee and future plans. She noted that they have requested a slight change to the charge of the committee. Chesler moved to accept their proposal to remove the sentence "The committee will prepare a Membership Development Plan with specific action items for review by the Executive Board at their fall 2006 meeting." Roth seconded the motion. The motion passed unanimously.

Maxwell distributed the committee's draft of the revised membership brochure. There was discussion of the content and format of the draft. Schatz recommended that the Membership Development Committee work with the conference logo artist to develop a polished version of the brochure.

ACTION ITEM: Membership Development Committee will work with a professional design artist to get a final polished version of the brochure ready for review by the board.

Maxwell noted that the Membership Development Committee had contacted all of the non-renewing members to encourage them to rejoin NASIG, or find out why they were not renewing.

Chesler asked if there were any additional perks that could be offered to NASIG members. After discussion, it was decided that the investigation of institutional, organizational and corporate memberships might be valuable.

ACTION ITEM: Maxwell will ask the Membership Development Committee to investigate the viability of NASIG offering institutional, organization and corporate memberships, with a report back to the board for discussion at the fall board meeting.

After a discussion of the current membership numbers, Schatz asked if the UKSG would be willing to share a 10 year review of their membership numbers for comparison with NASIG membership numbers during that time period. Whiting reported that 31 people had joined NASIG at the time of conference registration.

ACTION ITEM: Novak will ask the UKSG if they would be willing to share their membership numbers with us.

It was agreed that it would be good to get an indication of the areas of interest of NASIG members. A possible way to obtain this information is to have a check box on the membership renewal form for major job function. This will assist in targeting programming and other NASIG activities.

ACTION ITEM: Maxwell will ask the Membership Development Committee to review the ALA categories and revise it for our needs to

be included on the renewal information in mid July.

7.0 Brainstorming Session (Novak)

Novak reported on the logistics of the upcoming Brainstorming Session. Ginanni will be moderating the session and ground rules and documentation needed for the session was discussed. Tenney will take notes from the session that will be posted on the NASIGWeb site.

8.0 Committee Reports

The board thanked all committees for a great year. The board discussed actions that had been requested by various committees.

8.1 Database & Directory (Chesler)

Database & Directory Committee (D&D) asked if it would be possible to consider allowing members to make updates to their membership profiles themselves. After discussion it was decided that any decisions concerning this would be postponed until the Technology RFP was decided. Any changes incurred as a result of the Technology RFP would impact the membership database.

D&D requested several changes to the admin component and tools in the current membership database. Chesler will consult with D&D co-chairs to see how crucial these changes are for the upcoming renewal process. Maxwell asked that the Membership Development Committee be consulted on the various fields in the membership database, as information about membership may be valuable for their work.

8.2 Electronic Communications Committee (Ginanni)

Ginanni reported that the Electronic Communications Committee (ECC) recommended that the committee listservs be set up so that email attachments can be used by committees. The board agreed with their recommendation.

A second recommendation from ECC was to allow NASIG members who assist committees to be added to those committee listservs. It was agreed that with the approval of the committee co-chairs and the board liaison, other NASIG

members not formally on a committee could be added to that committee listserv. It was noted that some committee listservs are closed due to the confidential nature of the committee work.

8.3 Nominations & Elections (Page)

Page reported that the Nominations & Elections Committee (N&E) asked for flexibility in the timing of soliciting references for candidates. The board agreed that N&E should have this flexibility.

N&E questioned the number of names needed for getting onto the ballot through the petition process. It was noted that ALA only requires 25 names, so it was agreed that the current 10 names required was reasonable.

Anderson noted that maybe we need to open up the nomination process more. There was a discussion of the various ways to encourage a more open process. It was noted that online voting may allow for a more fluid and flexible process.

8.4 Site Selection (Novak, Simser, Tenney)

Simser reported on the site selection survey that was conducted in mid-May. There was a great response from the membership. 337 responses were received. Simser will prepare a report of the survey to be distributed by late June via newsflash on NASIG-L and included in the fall *Newsletter*. Some interesting results were that members indicated that hotel room rate was very important, but then selected some of the highest priced cities as top choices.

Information collected from the survey will be used in selecting sites for the 2009 conference and will assist in looking at future sites.

9.0 Technology RFP (Simser)

Simser led a discussion of the proposal and the responses from vendors. The discussion focused on the three critical functions needed from this process:

- Online voting
- Membership database development
- Online conference and event registration

Creech suggested breaking out sections of the proposal and asking for bids on the individual sections.

ACTION ITEM: Creech will contact vendors that did not respond to see if they would like to bid on individual sections of the RFP.

All responses should be received and processed before the late July Executive Board conference call. At that time the board will discuss responses and select a vendor or vendors to move forward in the process.

10.0 New Business

Schatz inquired about the selection process for *Proceedings* editors. Anderson noted that the current *Proceedings* editors make a recommendation to the board and the board makes the final decision. Currently there are three applicants for the one vacancy. Anderson asked that the entry in the working calendar for issuing a call for *Proceedings* editor be moved from November to September for a more reasonable selection timetable.

Page asked about the Moodle site that has been created by ECC to display the handouts from the conference and continue discussions that started in the various sessions. She asked that it be promoted during the conference and on NASIG-L. Creech discussed the creation of the site and how it will function. Page asked that speakers be reminded to load their handouts and check the site for discussions.

ACTION ITEM: Creech will compose a brief description of the Moodle site and how to access it for distribution at the conference and on NASIG-L. She will give the information to the Conference Planning Committee to have at the registration desk. Simser will remind Program Planning Committee to announce it at the Speakers Breakfast and during the conference.

Novak asked board members to consider possible dates for a July conference call and the fall board meeting. Tenney will collect information after the conference and schedule the meetings.

Simser proposed that NASIG pay for the conference fee and travel expenses for the incoming Conference Planning Committee (CPC) co-chairs at the conference prior to the

one they will be responsible for. It is important that they see the conference in operation and shadow the current CPC co-chairs during the conference.

Anderson moved that NASIG pay the conference fees and travel expenses within the NASIG Committee Guidelines for Reimbursement for the conference prior to the one they will be responsible for managing. Ginanni seconded. The motion passed unanimously. Simser asked Anderson to have this added to the CPC manual.

Novak asked everyone to remind their committee chairs and speakers that all requests

for reimbursements must be submitted within 30 days of expense. All reimbursements forms should be sent to Novak until further notice.

The board extended its thanks to Novak for her leadership over the past year.

Novak asked for any additional old or new business. None being noted, the meeting was adjourned at 3:22 p.m.

Revised 6/18/07

JULY CONFERENCE CALL

Joyce Tenney, NASIG Secretary

Date, Time: July 31, 2007, 11:00 a.m. EST

Place: Conference Call

Attending:

Char Simser, President

Jill Emery, Vice President/President-Elect

Denise Novak, Past President

Peter Whiting, Treasurer

Joyce Tenney, Secretary

Members-At-Large:

Rick Anderson

Anna Creech

Kim Maxwell

Alison Roth

Bob Schatz

Jeff Slagell

Ex-Officio Member:

Kathryn Wesley, *NASIG Newsletter*, Editor-in-Chief

1.0 Welcome (Simser)

Simser called the meeting to order at 11:07 a.m. EST.

2.0 Review of Action Items from May 2007 (Tenney)

There was discussion of the various action items. Maxwell noted that for the action item dealing with Membership Development Committee (MDC) investigating the viability of NASIG offering institutional, organizational and corporate memberships, she had relayed the request to MDC and that Slagell is the new

board liaison for that group and will report on their activities. Maxwell and Slagell inquired about the timeline for the review of ALA categories of job functions to be recommended for the renewal form. After general discussion, it was agreed that the categories should be added as part of the revisions required by the implementation of the Technology RFP. MDC should have their recommendation approved and ready to go when the rest of the database is ready. Slagell will relay this information to MDC and get an update on their progress.

Novak reminded everyone that there need to be many reminders of the renewal process for the membership when the renewal process opens for the year.

Schatz reported that the Bylaws Committee has reviewed the information on the term of the treasurer and reported back to the board. It was decided that the board will discuss this at the October board meeting.

3.0 Committee Updates

3.1 Committee Manuals (from Nov. 2006 board) updates (Simser)

Simser reminded board members that it was agreed in November 2006 to have all committee manuals posted in the public space of the committees on NASIGWeb. She asked each board member to follow up with their committees on this issue.

ACTION ITEM: All committees should have their manuals posted to the public space for each committee on NASIGWeb by the January board meeting.

3.2 Membership Development (Slagell)

Slagell reported that MDC has a draft document on the issue of NASIG offering institutional, organizational and corporate memberships. The document will be sent to the board for review.

4.0 Technology RFP (Creech)

Creech reported that she had been in touch with several of the potential providers that had not submitted a bid to the RFP. Most could only do one part of the process, so we are basically back to information from the May board meeting.

There is one more provider that Creech should be able to speak with this week. It was agreed that the most crucial components are online voting, membership database and online conference registration. Creech will submit a report to the board in the next week or two with final information and recommendations. Discussion will occur on the board listserv. It was agreed that a decision was needed before the October board meeting.

ACTION ITEM: Creech will prepare and distribute to the board a final report with recommendations on the Technology RFP within the next two weeks.

5.0 Brainstorming discussion on NASIG-L-action items (Simser)

Simser supplied a summary of comments from NASIG-L brainstorming discussion. After general discussion, it was decided to break the list into items that could be done in a short timeframe and directly related to the nomination process and items that should be tabled until the October board meeting and strategic planning meeting. Action items noted from the discussion on items that could be done in a short timeframe are as follows:

ACTION ITEM: Simser will address plans for online voting when the Technology RFP is implemented and updates to comments made on NASIG-L about the nominations and elections process in her president's column in the *Newsletter*.

ACTION ITEM: Novak will ask Nominations & Elections Committee to post on NASIGWeb the documents that the committee uses. (Nominee Profile Form, Nominee Phone Contact Form, Nominee Evaluation Form and a calendar with relevant dates.)

ACTION ITEM: Emery will contribute an article for the *Newsletter* on running for office as a petition candidate.

ACTION ITEM: Board liaisons should encourage committees to nominate members for executive office.

ACTION ITEM: Wesley will interview some past board members for the *Newsletter* to get estimates on the amount of time that is required for the various offices and the skill sets needed for each office.

ACTION ITEM: Wesley will contact some past board members and officers and ask if they would be willing to act as contacts for members considering running for office. Names of the contacts could be posted on the Nominations & Elections Committee website and on the Speaker Resources web page, so those who have questions can ask someone who has done the job for information on time commitments, type of duties, etc.

ACTION ITEM: Anderson and Emery will speak to CPC and PPC about finding time in the conference schedule for an informal session of past board members and officers speaking with members interested in running for office.

ACTION ITEM: Conference Badges should note if person is a past board member or past officer. Roth suggested a possible logo for these badges of "Ask me about being a NASIG Board Member".

Anderson suggested that the job specs of the officers and board members be revised to include the possibility that members may call them during or after their term to get information on the time commitments and duties required in that position. The board agreed that this would be a good idea.

Schatz noted that online voting would open up the voting process and possibly allow for primary and general elections. As the Technology RFP

process moves forward more investigation could be done into this type of election process.

Other items suggested by the membership will be discussed at the October board meeting.

6.0 Strategic Planning - initial discussion (Simser)

Simser reported that she is finalizing plans with the facilitator/consultant for an October 12 strategic planning session for the board members. There was a general discussion on desired outcomes from the planning session and how to use or not use the current strategic plan in the process. It was agreed that the current strategic plan would be used as a springboard for discussions and we will look at various sections of the current plan and see where it has been successful, where more work needs to be done, or if the idea needs to be restructured.

The board agreed to have a document that was more targeted to strategic directions instead of a long detailed document. It was noted that the process should yield an outcome that is worth the effort with specific short term goals, as well as a longer term vision for the organization.

Some ideas for discussion topics were discussing the focus of the organization, do we need a change in direction; rebranding the organization; and possibly mandate contingency planning.

Simser will relay ideas to the facilitator and report back on needed "homework" before the meeting.

7.0 CPC suggestion on special event sponsorship (Anderson)

CPC suggested using corporate sponsorship to fund an evening event for the conference. There was brief discussion and it was agreed to continue the discussion on the board listserv, as we were at the end of the meeting.

ACTION ITEM: Anderson will start discussion on board listserv on CPC using corporate sponsorship for an evening event at the annual conference.

Simser adjourned the meeting at 12:33 p.m.

Approved 8/23/07

TREASURER'S REPORT

Peter Whiting, NASIG Treasurer

NASIG's finances continue to remain stable. The balance sheet below reflects our income and assets as of July 31, 2007. Current assets are \$364,471.79.

Balance Sheet 7/31/2007
(Includes unrealized gains)
As of 7/31/07

ASSETS	
Cash and Bank Accounts	
Charles Schwab-Cash	\$ 32,242.22
CHECKING-264	247,597.88
SAVINGS-267	84,631.69
TOTAL Cash & Bank Accounts	\$364,471.79
Investments	
Charles Schwab	\$ 34,477.36
TOTAL Investments	\$ 34,477.36
TOTAL ASSETS	\$398,949.15
LIABILITIES & EQUITY	
LIABILITIES	\$ 0.00
EQUITY	\$398,949.15
TOTAL LIABILITIES & EQUITY	\$398,949.15

CALL FOR NOMINATIONS

Gail Julian, Chair, Nominations & Elections Committee

The Nominations & Elections Committee invites nominations for Vice President/President-Elect and three Member-at-Large positions. Please place your nominations either through the green form distributed in the Louisville conference packet or online at <http://www.nasig.org/members/forms/nomform.html>.

The deadline for nominations is October 12, 2007.

All current NASIG members are eligible (except current members of the Nominations & Elections Committee). For additional information about

the N&E process, please see information in the *NASIG Newsletter* at <http://nasignews.wordpress.com/2007/06/10/223-200709-nasig-nominations-elections-process-detailed/>.

This year's N&E Committee members are:

Gail Julian, Chair
Kathy Brannon, Vice-Chair
Christie Degener
Sarah Gardner
Susan Markley
Jenni Wilson
Tim Hagan
Denise Novak, Board Liaison.

23RD ANNUAL CONFERENCE (2008)

CPC UPDATE

Cory Tucker, Co-Chair

The CPC has begun preparations for the 2008 NASIG conference and subcommittees have been established to streamline the organizational process. The committee is well prepared for the fun that lies ahead!! The CPC is looking at several venues for the evening opening event, including the Phoenix Art Museum. For more information on the museum, please visit their website: <http://www.phxart.org/>.

The 2008 conference will be held at the Tapatio Cliffs resort (Pointe Hilton). The resort provides wonderful facilities including a waterpark (The Falls River Village) to keep you cool in the desert heat. The resort's website is <http://www.pointehilton.com/indextc.cfm>. We are looking forward to seeing everyone on June 5-8, 2008.

PPC UPDATE

Erika Ripley and Sarah Wessel, Co-Chairs

PPC is gearing up for work on what we hope will be another great conference. The 2008 theme is "Taking the Sting Out of Serials." The submission form for program proposals and ideas is available online: <http://nasig.org/public/forms/idea.htm>. The first round of submissions will be reviewed after August 20th. Ideas submitted after that time will be considered in a second round of reviews; look for a second call in early September for more details. The committee is particularly interested in hearing from publishers, vendors, librarians, and others about issues relating to scholarly communication, licensing, and

publishing. If you have a suggestion for a great topic or speaker, please don't hesitate to share that information with PPC and to encourage colleagues to submit proposals.

The evaluation and assessment report for the 2007 annual conference will serve as a valuable planning tool as PPC considers ideas about the program schedule, the number and types of sessions, and ways to include a wider range of speakers. If you have thoughts you want to share with the committee, please contact us at prog-plan@nasig.org.

CALL FOR PROPOSALS

NASIG 23rd ANNUAL CONFERENCE "TAKING THE STING OUT OF SERIALS"

JUNE 5-8, 2008 – TAPATIO CLIFFS HILTON RESORT, PHOENIX, ARIZONA

Sarah Wessel and Erika Ripley, Co-Chairs

The 2008 Program Planning Committee (PPC) invites proposals and/or program ideas for preconference, vision, strategy, and tactics sessions. The program planners are specifically interested in hearing from publishers, vendors, librarians, and others about issues relating to scholarly communication, licensing, and publishing. Please keep in mind the following:

- The Program Planning Committee will review all submitted proposals for their content, timeliness, and relevance to the conference theme and reserves the right to combine, blend, or refocus proposals to maximize their relevance and to avoid duplication.
- The Program Planning Committee will treat all submissions as suggestions and guideposts.
- Time management issues and reimbursement guidelines generally limit each session to two speakers.
- Proposals may be suggested as one type of session and/or format and ultimately be accepted as any one of the other types of sessions or formats; this decision is the purview of the Program Planning Committee.
- Vision and strategy speakers are required to produce a written paper for the conference proceedings. Because NASIG publishes its conference *Proceedings*, content needs to be unique for copyright purposes.
- ALL presentations must be original and not previously presented at other conferences.

The conference will be held at Tapatio Cliffs Hilton Resort, nestled in between Phoenix and Scottsdale in the midst of the Sonora Desert: <http://www.pointehilton.com/indextc.cfm>.

NASIG has a reimbursement policy for conference speakers whose organizations do not cover expenses. For more information about this policy, please see: http://www.nasig.org/conferences/reimbursement_policy.htm.

SESSION TYPES

- Preconferences are in-depth programs that focus on practical aspects of the work and skills we perform on a daily basis. In general, these programs are several hours in duration, have limited attendance, and may include hands-on training.
- Vision sessions are offered at no-conflict times to allow all conference attendees to participate. These programs generally deal with the larger universe of ideas and issues that may influence the serials world.
- Strategy sessions generally deal with all or, at least, several segments of the serials world including, but not limited to publishers, vendors, service providers, and librarians. These sessions are 90 minutes; please allow 10 minutes for questions from the audience.
- Tactics sessions are designed to address day-to-day issues and generally deal with one or two practical aspects of the serials world. These sessions are 60 minutes; please allow 10 minutes for questions from the audience.

To suggest a proposal or an idea, please fill out the submission form available at: <http://www.nasig.org/public/forms/idea.htm>.

The deadline for this call for proposals and ideas is August 20, 2007.

For more information about the North American Serials Interest Group, please see: <http://www.nasig.org>.

Inquiries may be sent to the PPC co-chairs, Sarah Wessel and Erika Ripley at: prog-plan@nasig.org.

22ND ANNUAL CONFERENCE (2007)

REPORT FROM THE 2007 AWARD WINNERS

Sarah Sutton, Awards & Recognition Committee

For 2007 NASIG awards, grants, and scholarships, the Awards & Recognition Committee received numerous applications from worthy candidates. We received seven applications for the Fritz Schwartz Scholarship, four applications for the Horizon Award, eleven applications for the Serials Specialist Award, and nine applications for the Student Grant Award. We did not receive any applications for the Marcia Tuttle International Award.

The review process was again blind for all awards. The identities of the winners were not revealed to the committee members until the scores were tallied and the winners were selected according to established criteria. For 2007, the committee awarded one Fritz Schwartz Serials Education Scholarship, six Student Grants, one Mexico Student Grant, one Horizon Award, and one Serials Specialist Award. The awards covered the cost of travel; room, board, and registration fees for the 22nd NASIG Conference held in Louisville, Kentucky; and a one-year NASIG membership. In addition, the Fritz Schwartz Scholarship winner received \$3,000 to help defray the costs of library school tuition. The 2007 award winners are as follows:

NASIG CONFERENCE STUDENT GRANT AWARD RECIPIENTS

Barbara Shipman, Wayne State University
Erin Sharwell, University of Washington
Jessica Ireland, University of South Florida
Joann Palermo, Louisiana State University
Sanjeet Singh-Mann, UCLA
Toni Fortini, Southern Connecticut State University

MEXICO STUDENT GRANT AWARD RECIPIENT

Jorge Alberto Mendoza-Torres, Escuela Nacional de Biblioteconomía y Archivonomía, ENBA

FRITZ SCHWARTZ SERIALS EDUCATION SCHOLARSHIP RECIPIENT

Angela Slaughter, Indiana University

HORIZON AWARD RECIPIENT

Chandra Jackson, University of Georgia Libraries

SERIALS SPECIALIST AWARD RECIPIENT

Rita Johnson, Wright State University Libraries

As in past years, the Awards & Recognition Committee asked all of our award recipients to provide feedback about their conference experience. Below are their responses to the committee's questionnaire.

Why do you feel it is worthwhile for students and newcomers to attend a NASIG conference?

The NASIG conference is great for newcomers because of both its size (not too big) and the variety of serials topics represented. It provides a good overview of all of the different types of work that serialists are doing in their institutions.

NASIG bridges the unnecessary divide between libraries, publishers, and vendors; it would be worthwhile for students to experience this productive partnership as they enter the serials field.

It's worthwhile for students to attend a NASIG conference because it introduces them to a field that isn't taught in library school. Also, the NASIG conference is a networking environment where students can create friendships with serial specialists located all over North America.

As a paraprofessional and new to the area of serials, the conference served to strengthen my desire to continue to learn and grow in the field. The sessions I attended were both interesting and applicable to the position I hold.

How did attending the conference benefit you personally?

I was introduced to many people working on the same kinds of issues that I am, so I'm beginning to create a network of colleagues that can be called upon for advice (or commiseration!)

I made a lot of connections with colleagues across North America and learned about ideas and initiatives in the world of serials. I felt reassured by learning that my library is not alone in the problems and issues we face with the switch to primarily electronic resources.

Attending the NASIG conference benefited me personally in many ways. I've gained the experience of attending my first professional conference. I've also met a lot of people and developed new friendships from the award winners as well as fellow NASIG members.

NASIG was truly an enriching experience. It was very beneficial in providing basic information as well as new and thought provoking ideas. The conference gave me new contacts, new friends, useful knowledge and fun educational experiences. I look forward to attendance at NASIG conferences in the future.

Did attending the conference influence your career plans? If so, how?

Not directly, but it was interesting to see the variety in serialists positions.

Yes. I am more interested in participating in professional organizations and conferences, and I am more seriously considering working in the corporate world (e.g. for a vendor) at some point in my library career.

Attending the NASIG conference influenced my career plans greatly. The many sessions that I've attended opened my eyes to different tasks, responsibilities and challenges that face serials librarians presently. I also got a glimpse at what the future holds for serials librarians. I'll have a better understanding of what serials librarians do and this will help me tremendously when I interview for a job as a serials librarian.

Since I was new to the position I am in, attendance at NASIG served to focus my interest in increasing my skills in order to better perform in my current position.

What can NASIG and/or the Awards & Recognition Committee do to improve their award programs?

I thought the committee and NASIG as a whole did a fantastic job with the Horizon Award program. The application process was very

simple, and after receiving the award, the committee made sure to communicate often with me about everything.

I was very pleased with my experience, and I can only suggest that an official wrap-up meeting at the end of the conference (scheduled to accommodate departures) to better connect with other award recipients. I feel I made more connections with NASIG members than with my fellow grant recipients, and it would have been nice to meet up with the group to talk about our experiences.

The most important thing that NASIG and the Awards & Recognition Committee do to improve the grant and scholarship program is to market the programs throughout North America. I think that a lot of students would be interested in attending such a wonderful conference. Also, I think that there should be an informal luncheon the day before the conference where all the grant and scholarship winners can get together to talk and learn more about one another.

The program is excellent. How can you improve on what is already a wonderful program?

What could NASIG and/or the Awards & Recognition Committee do to improve your conference experience?

Everything they did was great, in particular the mentor/mentee get-together.

My conference experience was great. Everything went smoothly for me thanks to the wonderful job done by everyone on the committee. I can't imagine what else could be done to make it better.

I had a wonderful experience at NASIG. The one thing that I would improve on is to have some type of social activity for the award and grant winners, just to break the ice.

Do you have any other suggestions or comments? Please tell us about them here.

Everyone involved was fantastic (almost as good as winning the award itself!). Keep up the good work!

The speakers were very informative and the sessions I attended were interesting and encouraged discussion. Louisville was a

wonderful location. What fun and interesting things there were to see.

I would just like to say that I had such a wonderful experience at the conference. Students can benefit so much by attending the annual NASIG conference.

How/where did you learn about NASIG's awards?

My supervisor at work is a NASIG member.

NASIG website and suggestion by my department head.

A co-worker told me about NASIG and encouraged me to think about attending the conference. I learned about the awards while visiting the website.

I learned about NASIG's award from a librarian that I work with.

Where should NASIG be promoting awards?

In the graduate schools: there are a lot of listservs that could be used to announce the awards competition. Contacting administrative assistants at each graduate program's department office would be a great place to start. Some programs may not have serials faculty contacts, so it's best to spread the word to the whole graduate program.

I think it would be great to use the listserv to remind those who do the nominating to consider their staff for nominations. The website is a good place for actual application info.

Members should be encouraged to promote the organization and the awards in the serials world.

NASIG should be promoting awards to student organizations, or on the student listserv.

The Awards & Recognition Committee would like to thank all of the NASIG members who helped to make the 2007 award recipients' experience at the 2007 conference such a success.

NASIG 22ND ANNUAL CONFERENCE REPORTS (2007)

OPENING PROGRAM

Reported by Susan Markley

The opening program for NASIG's 22nd Annual Conference began with the introduction of the 2007 NASIG award recipients, followed by a warm welcome from the Dean of the University of Louisville Libraries, Hannelore Rader. She spoke briefly about the university with its diverse student and faculty population, and the varied services that the Libraries on campus offered. Rader was followed by the delightful keynote speaker, Louisville historian and professor, Tom Owen.

Dr. Owen began his presentation by telling the audience about a 5-year experiment in which the urban city government was "married" to some suburban governments in an effort to improve services to all populations. This was followed by a fascinating history of the community from its earliest roots.

For those who delight in discovering the lively history of a city, Owen introduced the audience to George Rogers Clark, the founder of the

settlement that became the city of Louisville in 1778. Clark was the preeminent American military leader on the northwestern frontier during the American Revolutionary War. Louisville was developed as a "necessity of war" to protect scattered settlements against the British army and native Indians. The British were encouraging the natives in their attacks. Clark's successful attacks on the British troops and their forts eventually played a part in the ceding of the entire Northwest Territories to the United States after the war.

The city was actually named after the French King Louis XVI in gratitude for his help in the American Revolution with arms, officers, and equipment. All the region's distilleries used his family name – Bourbon.

Kentucky was originally part of Virginia, but broke off in 1792. Considered a border state, it was the dividing line between the North and the South. Although the state did not join the

Confederacy, they did join with the southern states after the Civil War because of strong economic ties.

Dr. Owen ended his presentation with a quick mention of some interesting local sites and some equally now famous local citizens.

His keynote address was just the right introduction to the start of our 22nd annual conference.

PRECONFERENCES

Metadata Standards and Applications

Diane Hillmann, Cornell University;

Rhonda Marker, Rutgers University

Reported by Deanna Briggs

Diane Hillmann and **Rhonda Marker** instructed approximately forty students in the Metadata Standards and Applications preconference session. The class was developed by Hillmann for the Library of Congress and the Association for Library Collections & Technical Services in early 2007. Many preconference participants expressed that their desire to attend the class was due to an impending project to develop a digital repository. As expected, most attendees were catalogers in some capacity.

The class covered a variety of metadata topics, including: metadata relationship models, interoperability, application profiles, and more. Hillmann and Marker explained early in the session that working with metadata standards and applications requires the metadata specialist to take a broad view of metadata, and consider how their metadata must function. For instance, one function of metadata is to manage documents. Therefore, the metadata specialist should look at items that require management in aggregate to make the best choices for the collection of items as a whole. The presenters stressed how important it is to frequently look at websites and digital libraries and mentally deconstruct them, asking themselves how the site applies metadata in bulk to collections to meet its functional goals. To illustrate this point, the class completed an exercise examining several digital library sites, including Birdsource (<http://www.birdsource.org>), which is a database-driven site.

The preconference presenters continued to expand upon this vision of the aggregate view concerning metadata creation, storage, management, and distribution. They discussed the pros and cons of different metadata creation

and storage models. They also remarked how important it is to maximize human resource efficiency in any project. For example, on the metadata distribution side, any one project might achieve some efficiency by harvesting metadata; but doing so may require additional human resources to implement the best methods to normalize the metadata for interoperability. Again, Hillmann and Marker focused the class on examples to see these principles in action, as in the case of the Country Walkers' site (<http://www.countrywalkers.com>). This site uses its metadata to draw potential customers in due to the ease of browsability, by destination, for instance.

No metadata information session would be complete without mentioning metadata relationship models and specific metadata standards. In this context, Hillmann provided the class with an update on the status of RDA and the class discussed relationships in UNIMARC, Dublin Core, and FRBR. The presenters noted that most metadata standards do not explicitly reference content standards, but simply provide guidance on content management. Some of the specific standards discussed included MARC21, Dublin Core, MODS, IEEE-LOM, and ONIX for Books.

The next lesson was metadata interoperability and distribution. As expected, OAI-PMH, OpenURL, and cross-walks were the focus of this section. Hillmann and Marker alerted attendees of the importance of documenting your institution's specific practices and interpretations of any one standard to enable appropriate sharing of metadata. The presenters also raised the issue of documentation in the lesson on application profiles, including the

many benefits of documenting the terms in an application profile.

The preconference also covered vocabularies and data quality. While it is important to document and register your vocabulary, Hillmann and Marker also emphasized the degree to which the choice of a vocabulary should be situation-specific, especially because there are so many different vocabularies.

Similarly, the presenters noted that data quality should be evaluated at the community level, as different communities may have different levels of data quality that may be acceptable for their purposes.

In summary, the course was an excellent whirlwind into the world of metadata standards.

SCCTP Integrating Resources Cataloging Workshop

Joseph Hinger, St. John's University

Reported by Selina Lin

Using the manual prepared by Steven J. Miller, University of Wisconsin-Milwaukee Libraries, in 2003, and revised February 2005, **Joseph Hinger** updated some parts of the course as necessary for this workshop. The workshop was taught in two days and divided into six sessions. Day one covered core sessions 1-3: Introduction, Original Cataloging and Updating Integrating Resources' Records; and day two covered optional sessions 4-6: Copy Cataloging, Record Modification and Maintenance, Case Studies, and Updating Loose-leafs. Emphasis of the workshop was on electronic integrating resources as they present more challenges and catalogers are more familiar with updating loose-leafs. Session 7, Selection of Online Resources and Options for Providing Access, was omitted due to time constraints and its lesser relevance.

With the advent of HTTP around 1991, many publications began to appear in electronic format by 1995. These earlier electronic publications were treated as computer files, Leader/06 Type of record code "m", regardless of their contents. As the Internet evolved and online databases and websites became prevalent, coupled with dissatisfaction with current rules for serials and loose-leafs, a desire to change OCLC and MARC to accommodate these emerging resources became self evident. The 1997 Crystal Graham/Jean Hirons paper "Issues

Related to Seriality," which was a major effort to harmonize AACR, ISSN, and ISBN, paved the way to the eventual complete revision of AACR2 and other changes in 2002. The new concepts of "continuing resources" and "integrating resources" were born. On December 1, 2002, LC implemented new AACR2 rules and LCRIs; OCLC and RLG also implemented most new 006/008 codes. Leader/06, Type of record code "i", and Leader/07, Bibliographic level code "i", were added to MARC to represent integrating resources.

An integrating resource, IR, is defined as "a bibliographic resource that is added to or changed by means of updates that do not remain discrete and are integrated into the whole." An integrating resource may be finite or continuing. Updating websites, updating databases, and updating loose-leafs are all integrating resources. However, online and loose-leaf format resources may be monographic, serial, or integrating. LCRI 1.0 provides guidance in making the decision. If the resource is basically complete, but may be corrected in some parts, treat it as a monograph. If it is likely to be updated over time, treat it as a serial or integrating resource.

Hinger continued the workshop with detailed information on each core session.

Publishing 101 – The Basics of Academic Publishing

Zachary Rolnik, Now Publishers

Reported by Lisa C. Gomes

This half-day preconference comprised useful information for everyone involved in the serials industry. **Zachary Rolnik** of Now Publishers has twenty-plus years experience in the serials publishing industry, which made him uniquely qualified to teach this session. He discussed the history of serials publishing and continued with a review of the market and the factors affecting it. Rolnik also included a review of the publishers from commercial through society and university presses.

Mr. Rolnik focused his discussion on the Scientific, Technical, and Medical (STM) market serials publishing, since that is his background. Market analysts identified scientific publishing as the fastest growing media sub-sector driven by the “publish or perish” mentality. However, there are three primary changes underway that affect this market according to the analysts. First, there is a cyclical slowdown due to library budget cuts. Second, the scales are tipped toward the larger publishers -- the large companies already have the business, and ninety-five percent of the market is based on annual renewals. Finally, the majority of money is spent on the Web interface for e-journals, which again tips the market to the larger publishers, as they can spend more money on their online platforms.

Typically, it is difficult for publishers to generate revenue from new journals. Therefore, large publishers have increased their focus on acquiring other, smaller publishers and enter into agreements with societies to license their content. In the meantime, the small and medium publishers develop niche markets and are author-centric.

There is also a new group of publishers entering the market that focus on current trends in the

industry such as: updatable content, open access, licensing versus copyright, community-focused and subject-focused, alternate sales options and so on. This group of publishers is often responsible for the most innovation in this market. Some examples of these newer publishers include Mr. Rolnik's company Now Publishing, Berkeley Electronic Press, (BE Press), and the Social Science Research Network (SSRN).

Mr. Rolnik also compared the differences between book and journal publishing. Although book publishing is a one-time process, journal publishing requires long-term commitment. The process of choosing a topic is quite different. In book publishing, the topic is either commissioned or the author already has a book they would like to publish. In contrast, the subject for journals requires market research to identify an underserved subject niche or subject fields. This process can be time-consuming.

The complicated structure for publishing a journal requires many different roles within the publishing companies. Therefore, a good portion of this preconference was dedicated to a discussion of the organizational structure of a typical publisher. The publishing or acquisitions department's primary role is to identify topics, trends, authors, and editors. Other areas that Mr. Rolnik reviewed included: manufacturing and production who turn the articles into the publication; marketing and/or public relations which could be responsible for the traditional marketing avenues, but may also include website development and getting the journal listed in different indices; sales; business development; fulfillment; customer service; accounting/finance; and technology.

VISION SESSIONS

The Evolution of Reading and Writing in the Networked Era

Bob Stein, USC Annenberg Center, Institute for the Future of the Book

Reported by Mary Bailey

In the early days of books, when professors made notes in the margins and students added their notes when they read the same book, an

ongoing conversation was created. **Bob Stein** proposes that the future of the book is an ongoing conversation in the margin of the

electronic book. Turning the world of authorship and copyright on end, the book as we know it, published in a definitive form, never to be changed, would no longer exist.

An MIT project in 1981 began adding an audio/visual component to books. Designed to enhance the book by answering the questions a reader might have as they read, it allowed the reader to control the speed, to reread sections, and to stop and think about what had happened in the book. In effect, it was user driven rather than producer driven.

Moving to 2004 and our remix culture, we are now talking about networked books, with comments added by readers. Stories could change before they are told. Books could be written in chapters with comments added before the next chapter is written; thus creating an entirely new writing process, and possibly a new form of authorship. Software, called Sophie, has been developed which enables not only the writing and comment component but also audio versions, an interactive glossary, running commentaries of musical selections and more.

Consider blogs. We think, we write, we create and others comment. We think, we write again

and others write again (we hope). A new creation appears. However, who is the author or creator now? Is the author speaking, are those commenting also authors or is the book now speaking? The book becomes dynamic and is no longer limited to text and static photos or illustrations; it now contains video and links to other sites.

If the work is always in process, will there ever be a version for copyright? Will there ever be a final authoritative version? Will copyright be necessary or will it become another piece of history? Will the original article become the least important piece and the discussion more interesting than the book or article?

The challenge of the future will be how to deal with the changes. Bob Stein asks, "Given the vast amount of information and conversation available on any subject should it be a goal to enable a single individual to master it? What will it mean to be 'human' in the age of digital networking? What is the definitive version or does anyone care?"

In Bob Stein's future, the book and reading are no longer a solitary pastime, but an interactive work developed by all who are interested.

Hurry Up, Please. It's Time – State of Emergency

Karen Schneider, ALA Techsource

Reported by Janet Arcand

Karen Schneider, librarian and noted writer at *ALA Techsource* and her own site, freerangelibrarian, gave a stimulating and thought-provoking presentation. It was centered upon the contention that librarians have allowed outside entities from the commercial market to take over the traditional areas of responsibilities of librarians. She likened the incremental trend of librarians ceding more and more of the selection and decision-making process to the vendors, through outsourcing of collection development and buying into package deals, as the "long slow boiling of the frog" so that it doesn't know it's being cooked.

Librarians have a public responsibility. They are in the profession of "memory work," ensuring that the published historical record is not corrupted so that later selective memory can impose a more romantic or biased view of the past. What might have seemed like a useful

tool, for example, the Google Library project, really has drawbacks if you look at the fine print. The Google Library Project comes from a commercial company which is imposing user restrictions upon their library partners, forbidding them in some instances from performing what has been their traditional professional duty, making information available to members of the public.

Information is being "disappeared" when editions of a work can be changed or disappear from the Web (as has been seen in the case of some government documents). Another alarming trend is for publishers not to allow post-cancellation access to online material for which the library paid in previous years.

Small presses produce significant material which large corporate publishers are not interested in publishing, for a fairly nominal economic reward

and with narrow profit margins. The continued existence of these presses is at risk since their profit margins are threatened by the impact of the proposed new postal rates. Time-Warner's clout has influenced postal rates to be less costly for the large corporate publishers, and more costly for small presses and anyone who uses the media material rate. Librarians should be leading the effort to lobby against these discriminatory rates.

There are some current projects which are designed from a librarian perspective, to ensure continued access to the public record. OCA

(Open Content Alliance) is a nonprofit group driven by librarians and creating an alternative to Google Book. LOCKSS (Lots of Copies Keep Stuff Safe) and CLOCKSS (Controlled LOCKSS), for copyright-controlled content, are also librarian-grown initiatives designed to "ensure the long-term preservation of digitally published scholarly materials". The digital information cannot disappear, since it is not held at a single site. Librarian participation and support of efforts such as these will put librarians back in the position of being stewards of the common librarian trust.

A New Approach to Service Discovery and Resource Delivery

Daniel Chudnov, Library of Congress, Office of Strategic Initiatives
Reported by Yumin Jiang

Daniel Chudnov, formerly of the Yale Center for Medical Informatics, and now of the Office of Strategic Initiatives at the Library of Congress, gave an eye-opening presentation on using COinS and unAPI to facilitate finding and citing information resources, and to integrate scholarly library resources with innovative Web resources and applications.

The focus of Mr. Chudnov's presentation was simplicity. Using the digital media player iTunes as an example, Chudnov asked why libraries cannot work like iTunes, which permits its users to easily connect with each other and share music. Even with OpenURL and link resolvers, he explained, it still takes many clicks for a patient and savvy user to get from a journal citation to the actual full text. In addition, there is an apparent disconnect between library resources and many of the Web 2.0 websites and applications. OpenURL is difficult to understand, inconsistently implemented by information providers, and requires service pre-coordination. How can OpenURLs be improved to help users find and use library resources? How can library catalogs/websites and other great Web resources and applications be connected? Chudnov thinks that new standards such as COinS and unAPI will be able to address these issues.

COinS, acronym for ContextObject in Span, is a specification to render OpenURL to HTML. This allows client software to retrieve bibliographic metadata and to use an OpenURL resolver to find a mediated link. The principal advantage of using COinS, rather than giving a static

OpenURL, is that the client can determine which resolver to use. For example, a Yale scholar visiting another institution will be able to access Yale-subscribed resources via Yale's link resolver instead of the host institution's. OCLC has recently established the OpenURL Resolvers Registry. It includes an OpenURL resolver registry for user input of resolver data, and a gateway which can redirect OpenURLs to registered resolvers based on the requester's IP address. If both the library and website publisher participate in this project, a user searching for information will find an item, click a link to the gateway and be taken directly to an OpenURL resolver maintained by his or her home library.

Currently, COinS has been adopted by a number of websites and applications, including: Wikipedia; WorldCat; Wordpress, a blog publishing system; LibX, a Firefox extension that provides direct access to selected libraries' resources; and Zotero, a Firefox extension that manages bibliographic information from Web resources. With COinS, we can achieve a complete and smooth interconnection between library catalogs, Web resources, and Web applications. For example, a user finds a citation in WorldCat, saves it in Zotero, adds it to Wikipedia; the next person sees the citation in Wikipedia, saves it in Zotero, adds it to his blog, and so on.

Together with COinS, OpenURL holds the promise of wider, easier access to library resources from various Web resources and applications. However, as Chudnov reminds us,

people “want stuff, not meta-stuff.” Can people simply re-use library resources within new Web applications? That is, can users copy items they see online and paste them into desktop applications or other Web applications such as blogs and photo-sharing services? unAPI provides a method for copying rich digital objects out of any Web application. It is a tiny HTTP API, application programming interface, for the few basic operations necessary to copy discrete, identified content from any kind of Web application. A direct benefit of employing unAPI on a website is that it allows other Web users to easily take a piece of its content to create new resources. In Chudnov’s words, “You see stuff, you get stuff, and you pick the format.” The unAPI specification is less than two pages and requires very few changes in Web templates. It can be added to all library resources such as the OPAC, institutional repository, journals, metasearch, and link resolver. Currently, two major applications using unAPI are Zotero and Wordpress. Chudnov hopes that more website publishers will adopt this new specification.

The next frontier in information services is service links. Examples are the set of buttons next to an article in a journal or major media websites. They permit users to email, save, print, and cite in various formats, or send to a bookmarking application such as del.ici.ous. Libraries can use OpenURL to facilitate this kind

of service. OpenURL with COinS can provide user-generated service coordination, and unAPI allows users to choose various formats of the same object. Chudnov proposed a new specification nicknamed SLAPI, Service Links API, which will fully integrate library resources with free Web resources at the user’s end.

Finally, Chudnov explored how libraries can work like iTunes, letting users find their friends’ libraries. One approach is to mesh metasearch and link resolvers, since they work similarly from the user’s perspective. OpenSearch, a collection of Web technologies that allows publishing of search results in standard format, can further simplify the search process. When a user’s Web browser knows where a user wants to search and resolve, coupled with SLAPI, a user can access his institutional resources anywhere on the Web, from citation directly into full text. With Zero Configuration Networking technology, the user will not even need to configure his browser.

In this ideal environment, everyone visiting your network automatically finds your search/resolver interface, and everyone else you visit finds your institutional resolver. Furthermore, no installation is required on the user’s part. This full circle, coupled with SLAPI, contends Chudnov, is a new approach to service discovery and resource delivery.

STRATEGY SESSIONS, GROUP A

On Your Mark, Get Set....Talk! The First Ever NASIG Speed Rounds

Yvette Diven, CSA

Reported by Gene Gardner

Organized around the principle of speed dating, this was a fun, informative session to discuss issues between publishers and librarians. Participating publishers included: the UKSG Transfer Group, Alexander Street Publishers, Now Publishers, Accucoms, Elsevier, University of Chicago Press, Institute of Physics, Sage, World Society of Chemistry, Portland Press, and the American Chemical Society.

Non-publisher participants divided into small groups and moved from table to table when the

timer rang. In this way non-publisher participants were able to interact with each publisher. Issues discussed ranged from an explanation of products offered by the publisher, electronic archival access, usage statistics, perpetual access, communication from publishers to subscribers, and other scintillating topics. This was a pleasant, informal way to interact with people.

Column People: What's their Future in a World of Blogs? The Role of Columnists in Academic Journals

Allan Scherlen, *Collection Development Librarian, Appalachian State University*
and a columnist for *Serials Review*;

Bob Nardini, *Head Bibliographer, Coutts Information Services*
and a columnist for *Against the Grain*

Reported by Stephen Headley

After presenting some discussion questions for the session, **Scherlen** opened the session by asking the audience if they were currently blogging or at least regularly read blogs. A sizable portion of the audience responded that they were involved with blogs. He then asked how many people followed one or more columns. Fewer people responded to that question.

Scherlen laid a foundation for comparing and contrasting columns and blogs and for discussing the intersection and mutual influence of the two forms by defining them and outlining their histories. The majority of columns generally share a number of features including: written with a "single voice, topic focused, periodic, editorial filter, writer hired or selected, and part of a larger publication." He noted the variants, such as travel, gossip and book review columns. Scherlen outlined the long history of columns, which can be traced back at least to periodical commentaries from the early 1700s.

He then offered two definitions of blogs from recent writings on the subject. One of these was from Mark Tremayne's *Blogging, Citizenship and the Future of Media*. It stated, "Blogs are distinguished from other websites in their dynamism, reverse chronological presentation and dominant use of the first person." He then shared studies of blog users which found that, of the more than 80 million blogs, most were by single authors and contained personal information about them. A brief history of blogs was provided, starting with 1997 when the term "weblog" was coined, through the development of political blogs, to May 2007 when it was estimated that there are more than 81 million blogs.

A comparison of blogs versus columns was presented next. Scherlen listed the following similarities, noting that there are many exceptions to these general distinctions: they both have a personal voice with an opinion or

analysis; both can have "substantial readership"; and either can be well written and considered "good journalism." The differences were more numerous. Blogs generally are more informal, "diary-like," and can have miscellaneous related content, whereas columns are usually topic focused. They have frequent updates and accumulate posts, whereas columns are periodic and less frequent and consist of "single stand-alone piece(s)." The author of a blog can be anyone who can write whatever they please as compared to a columnist who is hired or selected and whose work must pass through an "editorial filter." Many blogs contain links to their archives or other blogs, whereas columns do not usually have links to archives or other columns. Most blogs have a way to include readers' comments and are open access, while traditional columns do not provide a direct way to submit readers' input and many have "subscription barriers."

Scherlen concluded his part of the presentation by posing the question, "Are the boundaries between traditional publishing and new online expression blurring?" He contends that blogs are having a significant impact on mainstream media. More and more users are questioning mainstream media while blogs are receiving increased credibility. At the same time, mainstream media are taking on features of blogs and embracing them in some way. For example, having links that ask for readers' comments, hiring bloggers, and having their own journalists create their own blogs. Columnists are increasingly recognizing that their readers are aware of major blogs and are actually citing those blogs.

Nardini opened his part of the session by stating that bloggers and their readers comprise a "subculture," while columns and even prominent columnists do not. He followed with his differences between blogs and columns. Bloggers do not have the structure and pressure that columnists have and columnists do not have

the independence of bloggers. He said that blogs have more of a “sense of community” for readers because of their personal content. As an example, he offered that many librarians’ blogs seek to break the stereotype of the uptight, shushing librarian. On the other hand, columnists and their readers do not have any kind of interaction. Furthermore, columnists are more traditional than bloggers, “ketchup not salsa.” Nardini added that columnists offered a point of view, a certain attitude, and distinctive individual styles more readily than blogs, which show a certain sameness in attitude and style. He illustrated his points by referring to the recent death of famous columnist Molly Ivins. He talked

about his admiration for her work and the reverence for her that was displayed upon her death.

Following Nardini’s presentation, Scherlen and Nardini posed some questions for the audience to think about and respond to. Is there room for both columnists and bloggers in the media and publishing world? Are there any reviewing or indexing sources for blogs? Should librarians be leading people through the blogosphere? Several people from the audience defended the content of blogs and their quality. Others cited the convenience and easy access of blogs as reasons for why they read them.

What’s Different about the Social Sciences? Why One Size Doesn’t Fit All

Leo Walford, SAGE Publications

Reported by Mary Bailey

One size doesn’t fit all, especially when looking at professors, researchers and journal publishers in the social sciences vs. the hard sciences. **Walford** researched the common themes and differences between how journals are used and why. He stated that it is hard to define what the social sciences are, and that they change over time; even universities do not agree on what the social sciences or humanities are, except that neither is part of the hard science field and that these researchers work differently.

Researchers in the science, medical and technology fields want the most current, up-to-the-minute facts immediately, preferably in an electronic (instant) format. Those in the social sciences want yesterday’s information. They are willing to read it in any form available, including brown and brittle primary materials from a dusty attic. The date of the material is important only in relation to the subject. There is little need for publishing speed.

Due to the type of research and subject matters, editors and publishers are more involved in social science journals. The editors and publishers of science journals may have less understanding of the material being researched or published. The information needs to be available as quickly as possible and peer review is extremely important. In the social sciences, the editors and publishers become more engaged in the subject matter and the boundary lines between the editor, publisher and authors are harder to define. There is more discussion

about moral issues and copyright because everyone is more involved.

Publishing revenue sources for social science titles are more restricted. Academic libraries are the primary purchasers unlike the science fields where firms or companies need the same information.

Another area to consider is how the journals themselves differ. An analysis of citations in science journals shows 90% of all citations refer to other science journals. In the social sciences, more than half of the citations refer to materials outside the social science journal literature, thus lowering the impact factor for social science journals.

Walford created graphs to illustrate usage of the different types of journals. For science titles, 60% of use is within the first year of publishing. Social science titles are opposite, thus creating a much longer shelf life.

Other areas of difference include pricing since social science titles require less technology and are cheaper to produce. How relevant that becomes in the world of package deals is still to be decided. There are also some questions about open access and social science titles. Since science titles are in high use early in their shelf life, open access is fine after a certain time. However, for social science titles, 75% of their usage is after six months, so social science publishers are less willing to engage in open access because the economics are different. Of

the four to six thousand social science journal titles available, only about eight hundred are open access.

In conclusion, Walford stated the social science journals are different. They are a vibrant, vital

part of the scholarly endeavor, enriching society and disseminating knowledge, and that the social sciences' users, researchers and publishers all need the library.

Institutional Identifiers in the Journal Supply Chain: What's Good, What's Bad, What's Missing

Don Chvatal, President, Ringgold, Inc.

Reported by Carol Green

Don Chvatal began the presentation with a definition of the journal supply chain. Publishers, distributors, ILS and ERMS vendors, subscription software vendors, subscription agents, online hosting services, institutional subscribers and individual users are all participants in the supply chain. Complex relationships exist among the participants and as a result, the journal supply chain is often disorganized and inefficient.

In January 2006, the British Library, HighWire Press, HighWire affiliated publishers, Ringgold, and Swets launched the Journal Supply Chain Efficiency Improvement, JSCEI, pilot project. The goal was to create an institutional identifier that could be used in the supply chain from start to finish, thereby improving communication between publishers, agents, service providers, libraries, and users. Standard use of an institutional identifier could help alleviate a number of problems associated with ordering/renewals, missing issues, loss of electronic access, and difficulty setting up initial access. Chvatal talked in depth about other goals of the JSCEIP pilot, how institutional identifiers work, Ringgold's *Identify* database, and Ringgold's involvement with the project.

What's good? The use of institutional identifiers can lead to customer service improvements, for example, faster e-access activations and simplified pricing. XML messaging can be used to enhance communication between participants. Due to its success, the JSCEI project is being extended into 2007.

What's bad and what's missing? Few systems exist to support the exchange of information between parties and there is a lack of working models for information exchange. International standards and definitions need to be developed for institutional metadata. Currently there is a lack of participation by ILS and ERMS vendors as well as libraries.

The pilot expansion will focus on weaknesses in the journal supply chain. Fixing the chain requires participation from all parties. Some of the things we as information professionals can do are to use the *Identify* database to maintain local information, provide constructive feedback, support NISO/input to standards, and encourage ILS and ERMS vendors to support the use of institutional identifiers.

See <http://www.journalsupplychain.org> and <http://www.ringgold.com>.

How Does Digitization Affect Scholarship?

Roger C. Schonfeld, Ithaka

Reported by Buddy Pennington

Roger C. Schonfeld of Ithaka gave an insightful glimpse into the preliminary results of a research study assessing the impact of digitization on scholarly research. The ongoing study involves impacts on citation rates for three disciplines including economics, history and biological sciences. Roger reported that the study has conclusively shown an impact on citation rates for economics. The study has not progressed to

the point where conclusions could be drawn for the disciplines of history and biological sciences.

Scholarly publishing can be viewed as a two-sided market where journal publishers serve as an intermediary between authors and readers. A national faculty survey conducted in 2006 highlighted the differences between authors and readers in terms of what they value most in an

academic journal. When asked what authors look for when choosing a journal to publish their research, wide circulation was the most important criterion. That is to say that journal impact matters most to authors. So how has journal impact changed with the recent increase in journal digitization?

The Ithaca study involved examining the citations to 100 journals for each of the three disciplines within Thomson's ISI citation databases. The years examined included 1980 to 2005. Regression analysis was used to determine correlations between digitization and changes in citations to the selected journals for these disciplines.

Preliminary results on the impact of backfile digitization, using a sample set of journal volumes from 1956-1968, indicated that there is a relationship between digitization and an increase in citations to those backfile journals. Inbound citations increased from 7% to 17% after digitization, and the study demonstrated that this impact grows steadily over time.

Different channels or platforms had different effects. For one platform, the increase was in the 3%-15% range while it was 8%-18% for another platform.

Preliminary results on the impact of digitization of current issues, using a sample set of journal volumes from 1995-2005, showed a significant effect. However, the results were more complicated than the backfile data and require additional analysis before they can be reported with any degree of confidence. Roger did note that the publisher is not always the optimal distribution channel in terms of citation impact and that longer embargo periods decrease the citation impact for that particular platform or channel.

Roger concluded by stating that Ithaca will continue with the research project in order to assess any statistical variation between the disciplines. He would also like to look at whether the year of publication matters in terms of digitization's impact on citation rates. Is the relative impact greater for older materials?

From Tech Services to Leadership

Anne E. McKee, Greater Western Library Alliance
Reported by Rosemary LaSala

The session "From Tech Services to Leadership," moderated by **Anne E. McKee** from the Greater Western Library Alliance, was well attended and began with the promise of active participation and discussion. The speakers, **Joyce Ogburn**, Director of Marriot Library at the University of Utah, **Karen Calhoun**, Assistant University Librarian for Technical Services at Cornell University and **Carol Pitts Diedrichs**, Dean of Libraries at the University of Kentucky began the discussion by focusing on two aspects: what leadership is and what it encompasses; and how technical service librarians can rise to be leaders in their fields. All of the speakers have varied backgrounds and many of them have been NASIG and ALA board members. The presenters' talents encompass the profession as a whole and their expertise is what helps determine their varied styles of leadership.

The speakers had many ideas for success as leaders and the majority of their ideas were the same. "What is leadership and what does it encompass?" requires many different steps and ideals. The main themes all the speakers

discussed were the importance of honesty, integrity, and the ability to listen. Some of their ideas for success were:

- Build a coalition; recruit followers that you can help develop to become good leaders in the future.
- Find and adopt good models, steal liberally and share the credit.
- Strive to say yes.
- If you are not sure why you are doing something, ask yourself why. Remember you have an impact on your organization and your staff.
- Have a vision, dream big.
- Remember no mistake is ever final.
- Always be honest, lead with integrity, and be fair.
- Seek to influence rather than command.
- Have some fun.
- No leader is an island, no one does anything alone, and everything is a group process.
- Leadership is not about power.
- Leadership and management are not the same.
- Be flexible.

- Look for common ground if you're having difficulty working with different areas of your organization.
- Making good things happen is extremely rewarding.
- Listen to the dissident voice, do not be defensive.
- Do not accept the status quo.
- Be able to talk one-on-one to someone.
- Adjust and manage your style to people's issues.
- Learn to say you can't talk about a subject now but when you can you will.

Leadership can be messy; there are times that you will feel resistance. Always remember that there is value in every point of view. In an organization, it is vital to know your staff and their personal styles. You must understand what they are saying and be willing to listen and compromise. A leader must be willing to be the first one in a messy situation to take responsibility for a mistake. Furthermore, a good leader needs to accept help from people whom he or she has trusted with responsibility.

The second point the speakers discussed was what technical services has taught them individually about leadership. All of the

presenters spoke about the changes in technical services that have occurred over the last twenty years. Leaders must find ways to accomplish the goals of their organizations with less money, constant change, tension from employees, and an understanding that one must delegate and be prepared to meet resistance. A leader must recognize that to emerge successfully after all these changes, one must understand that these changes are difficult for support staff as well. The help and willingness of the support staff to change is an integral part of success. Technical service is a team-based approach; they deal with internal and external stakeholders. Collaboration is the hallmark of technical services.

Leadership takes energy and passion; you must find your own ways to recharge yourself. Everyone spends so much time at work that it is important to understand that there needs to be a balance between life and work. Individuals who are in leadership positions need to remember that it is not about themselves, but the organizations that employ them. During this session one could understand that the speakers embraced this reality as an integral part in their roles as leaders, individuals, co-workers, women, and team players.

Hitting the Trifecta: Alternative Career Paths for Those with an M.L.S.

Anne McKee, Beverley Geer, Michael Markwith, Steve Oberg, Bob Schatz, and Christine Stamison
Reported by Lisa C. Gomes

This panel presentation featured six people, representing five alternate careers ranging from consortia to vendors. **Anne McKee** first spoke about her role within the Greater Western Library Alliance, noting that she bridges the gap between the research libraries that are part of the consortium and vendors. Ms. McKee emphasized that her M.L.S. provides her the advantage of being familiar with library jargon. There are differences between the consortium and a traditional library that require more work on her part. For instance, she telecommutes and it is more difficult to stay abreast of the current trends within the industry.

Bob Schatz talked next about his experience as a book jobber with Coutts Information Services. Mr. Schatz noted that it is easy to get a job as a bookseller with an M.L.S. His experience is quite transferable because the work that he does spans several areas within a traditional

library: part cataloging, part administration, and part systems. However, his measure of success is based on profit.

The first subscription vendor that spoke was **Christine Stamison** from Swets. Ms. Stamison explained that her customers view her as a trusted advisor because of her experience as a librarian. However, there are some distinct differences working as a vendor. Many business factors affect her work environment, such as mergers and the need to meet quotas. She expressed that there is never a dull moment and if you have the gift of gab you would probably be successful.

The next presenter was **Steve Oberg**, who spoke of his experience at Endeavor where he created the specs for products, including the searching and taxonomy used by the systems. Mr. Oberg acknowledged that while he is not

responsible for managing a print collection, his M.L.S. allowed him to appreciate how information is organized. He advised it is never a good idea to return to an old job, but instead to use that job to build and clearly articulate a record of accomplishment that you can include at the top of your resume.

Beverley Geer from Sage Publications gave her perspective as a publisher. She began by encouraging the audience to find something they do well, do it, and then grow to love it! If you are considering a career switch, Ms. Geer suggested that you stay involved with your professional organizations, volunteer for committee work, and seek out a mentor. She also suggested that you approach your job from the standpoint that you are educating your customers, not selling to them.

The final panelist was **Michael Markwith** from WT Cox Subscriptions. Mr. Markwith said that it is all about the people -- the goal is to educate. It is important to be passionate about your position and transform that passion into commitment for libraries.

Questions and comments highlighted some final thoughts about working outside a traditional library environment. It is a business mindset with a different vocabulary. Often deadlines are more firm with the goal of coming in under budget. You must be self-motivated and able to take rejection. Even with these pressures, librarians employed by vendors are still extremely loyal to libraries and strive to keep up their professional involvement and personal relationships with librarians.

STRATEGY SESSIONS, GROUP B

It Takes a Community: Early Lessons and Accomplishments of CLOCKSS

Victoria Reich, CLOCKSS Initiative, LOCKSS Program, Stanford University Libraries

Reported by Valerie Bross

Vicki Reich presented a compelling argument for e-resource preservation, and, more specifically, for the use of LOCKSS and CLOCKSS. (<http://www.lockss.org>)

Developed in 1999-2002, LOCKSS (Lots of Copies Keeps Stuff Safe), provides a technology for libraries working as a community to cooperatively ensure access to selected materials for future generations. Currently, 200 LOCKSS boxes are saving publications of 200 publishers. The publications cover a range of e-resources—e-serials, e-books, blogs, e-theses/dissertations, government e-documents, and websites—in a variety of formats (images, video, text, software, pdf, xml).

You, too, can do it—along with six of your friends. The myth of digital preservation is that it takes a highly technical staff, using an extremely expensive and complex setup. Apparently, this is not true of LOCKSS, which can run on low-cost PCs. The key is multiplicity. LOCKSS works on the premise that the more libraries that preserve the same resources, the better the probability of survival.

The first step is to set up the LOCKSS server, a task that Vicki assured the audience is easy to

do. The next step is to gain LOCKSS permission from a publisher. Third, one must prepare the LOCKSS box to collect and preserve the desired publication(s). The LOCKSS software will then periodically poll the publisher site and draw in new content. LOCKSS will also check preserved files against the same content in independently-administered collections, to repair any files that get corrupted.

Begun in 2006, CLOCKSS builds on the success of LOCKSS. CLOCKSS, or Controlled LOCKSS, is a private LOCKSS network. The CLOCKSS mission is to ensure access to published scholarly content over time. Seven libraries and eleven publishers are currently cooperating on this initiative. A major difference between CLOCKSS and other preservation initiatives is the concept that the content could be freely available to all under certain conditions, called “trigger events.” An example of such a trigger event would be when a title is no longer being published and no publisher has responsibility or is providing access.

During its first year of operation, CLOCKSS has earned considerable recognition, achieving the 2007 ALCTS Outstanding Collaboration Award.

Academic Journal Publishing

Peter Binfield, Journals Editorial Director, Sage Publishers;

Zac Rolnik, now publishers;

Kerry Cole, Head of Marketing and Sales, Portland Press;

Cindy Brown, Production Manager, Medical Journals, Wiley-Blackwell

Reported by Jeanne M. Langendorfer

Peter Binfield spoke first about acquiring existing journals. Publishers acquire journals to build more attractive sales packages, to improve the quality of content, to drive usage, to gain new readers, to break into new markets and to increase revenue. Journals are acquired by temporarily assuming the contract for an existing journal, typically a society journal, or by outright purchasing of a title, usually from another publisher. The prices paid range from one to six times their annual revenue. Society titles often are leased for a set period of time, with the owner retaining editorial and content control. Tools and services include online peer review software, author gateways, and author care communications. Publishers produce these reports: usage data, financial, editorial, strategic, circulation, bibliographic data and revenues to other stakeholders. They maintain the integrity of the content by managing the peer review process, maintaining their online archive and checking for plagiarism and multiple publication.

Zac Rolnik described the process of launching a new journal. Publishers network with potential authors by visiting campuses and attending conferences. To discover topics that might lead to a new title, publishers monitor listservs, the news and the literature of the field; talk with their marketing, sales and customer service staff; conduct market surveys; and research underserved topics, new scholarly topics and new societies. Publishers find an editor-in-chief who is a research leader in the field, has good organizational skills, an established network and is willing to participate. The editor might receive 2.5-10% of the royalties and a stipend up to \$10,000. Additional incentives include making an impact on and furthering research in their fields. Usually, the publisher owns the journal. The editorial board members are invited and should include researchers with a range of experience from around the world.

Cindy Brown described value-added publishing. Services include: peer review

systems customized for the client; adding digital object identifiers and XML for full-text search capability; copy editing, typesetting and proofing for errors; distributing pages electronically to authors; providing a proofing website and English-language editing services. Brown presented in detail Wiley-Blackwell's online early production workflow. Author services and gateways allow authors to follow the article through the publishing process. Next, the steps taken by authors along with the services that publishers provide to the author at each of those steps were described. Providing a digitized journal backfile for online access in perpetuity is highly desired by libraries. There is a great demand on publishers to provide quality articles quickly and as economically and efficiently as possible.

Kerry Cole offered a sales and marketing view of academic journal publishing. Marketing is "...an organizational function and a set of processes for creating, communicating and delivering value to customers and for managing customer relationships in ways that benefit the organization and its stakeholders..." (American Marketing Association). Cole described Portland Press as a publishing subsidiary of the Biochemical Society, which publishes five journals and three electronic products. It is based in the UK, and has five staff, two of whom handle marketing and two of whom have sales and licensing responsibilities. In the print world, prior to 1995, one person handled marketing and there was no sales staff. Customers were authors, subscribers, editors, and subscription agents. With the onset of e-journals, librarians also became customers. To learn their customers' needs and the best ways to help them, the publisher attended conferences worldwide, ran focus groups, and visited and surveyed customers worldwide. Then they created marketing materials, improved their online journal platforms and account administration, offered consortial and package purchasing and addressed licensing issues.

Cooperative Trends in Digital Archiving: An Open Discussion

Eileen Fenton, Portico;
Daviess Menefee, Elsevier;
Marilyn Geller, Lesley University
Reported by Gail Julian

A librarian, a publisher, and an archive provider shared their perspectives on digital archiving. **Marilyn Geller** focused on the library's viewpoint. Lesley University is an academic institution with 4500 FTE and several graduate programs. To preserve print, they purchase archival quality books, bind journals, and retain journal backfiles. Lesley is considering remote storage and is moving to electronic journal backfiles, for example JSTOR. To preserve electronic, Lesley University has joined Portico. Twenty-seven percent of their research level titles are in Portico. Geller determined that Portico membership averaged \$18.71 per title, per year, a small price to pay for the security provided. Even after joining Portico, Geller still has concerns. What happens if a "trigger event" occurs? Who's archiving aggregated databases? What happens to content from small publishers and societies who do not participate in Portico or other ventures? Geller also recalled the CLIR recommendations: to encourage publishers to join archiving initiatives, for libraries to participate in at least one archiving program, press for more digital programs, and lobby archiving programs to work cooperatively. For additional information, see *CLIR pub 138, E-Journal Archiving Metes and Bounds: A Survey of the Landscape*, available at <http://www.clir.org/pubs/abstract/pub138abst.html>.

Daviess Menefee from Elsevier discussed their efforts and rationale in participating in archiving initiatives. As the economic model shifts

increasingly from print to electronic, libraries no longer archive journal content locally. Publishers are expected to maintain content indefinitely and migrate that content as technology changes. Menefee feels that STM publishers have a responsibility to maintain a permanent record of scholarship. In 1999, Elsevier made a commitment to archiving and in 2001, participated in a Mellon planning grant. Elsevier has four levels of redundancy: publisher maintained archives, exterior archives such as OhioLink, customers worldwide who receive a copy of everything published, and contractual agreements with Portico, CLOCKSS, and the National Library of the Netherlands. Elsevier is reaching compliance with the CLIR report.

Eileen Fenton, Executive Director of Portico, described their mission as preserving scholarly literature for future researchers. Their focus is on peer-reviewed scholarly journals. The titles are recommended by libraries and range from large commercial publishers to small scholarly presses. Portico is concerned with intellectual content, not functionality. Once a title has been placed in the archive, it cannot be removed. Customers who support the archive will receive access should a "trigger event" occur. The archive is funded by libraries and publishers and currently contains approximately 6000 titles. Portico provides a script which compares local library holdings against Portico by means of the ISSN.

Tumbling Dice: Publishers, Aggregators and ERM

Sandra Hurd, Director of Strategic Markets, Innovative Interfaces, Inc.;
Kathy Klemperer, Library and Information Systems Consulting;
Linda Miller, Library of Congress
Reported by Sanjeet Mann

At this information-packed session, a trio of speakers introduced current Electronic Data Interchange, EDI, metadata standards for describing electronic resources; discussed the workflow challenges that EDI aims to resolve; and offered examples of practical EDI implementation at the Library of Congress.

Sandy Hurd began the session by contrasting the serials business cycle before and after the introduction of EDI. Librarians, publishers and subscription agents continue to interact, and the basic tasks of ordering, invoicing, dispatching, claiming and responding to access problems are still relevant. However, maintaining access to

remotely owned resources requires complex troubleshooting, license management and the collection and calculation of cost-per-use data. Hurd went on to discuss the new service; financial, contractual and management responsibilities of publishers and librarians; and offered a basic taxonomy of electronic resources.

Kathy Klemperer defined four types of metadata standards for e-resources management: encoding standards, XML, Z39; communication protocols, HTTP, FTP; content rules, COUNTER, AACR2; and metadata communication formats, ONIX, SUSHI, MARC21. She then delved into ONIX, a family of XML-based rules for communicating information about serials products and subscriber information. Klemperer then discussed two important metadata formats: Serial Online Holdings, SOH; which allows libraries to receive detailed coverage statements from content providers, and Serial Release Notification, SRN; which can alert libraries to upcoming new issues. Klemperer also described ONIX Publication Licenses, ONIX PL, and a new standard to encode useful licensing information so that it can be loaded directly into an ERMS. Finally, she addressed the role of EDI in

promoting interoperable use statistics. COUNTER provides a common definition of e-resource usage, and SUSHI is an XML-based standard that allows usage data to be automatically harvested. Klemperer emphasized that for these statistics to be reliable, publishers must support the generation of COUNTER- and SUSHI-compliant usage data.

Linda Miller underscored the need for a more robust implementation of these metadata formats. She noted that resistance from various parties is a larger obstacle to EDI than inherent technical limitations. Miller demonstrated several idiosyncrasies in the Library of Congress's e-journal holdings enumeration that could be resolved by closer standards implementation. According to Miller, the skill sets of future serialists should include license negotiation, file loading techniques, market knowledge, and understanding what makes MARC and authority records suitable for copying. Finally, Miller provided her own wish list for the future of EDI in which all vendors reported SUSHI-compliant use statistics; publication management systems, PAMs, adopted ONIX SOH to give complete holdings enumeration; and widespread use of ONIX PL allowed librarians to easily interpret license terms.

TACTICS SESSIONS, GROUP A

Successive Entry, Latest Entry, or None of the Above?: How the MARC 21 Format, the Concept of a Work and FRBR Revitalize Serials Management

Katherine Adams and Britta Santamauro, both from Yale University

Reported by Sarah Gardner

Katherine Adams and **Britta Santamauro** from Yale University presented a theoretical model for managing serials cataloging and display using FRBR, Functional Requirements for Bibliographic Records, concepts and the MARC 21 format. They began the session examining the "cataloger's dilemma" of how to create the best record structure for something as fluid as a serial. They proposed FRBR-izing the "front-end" (interface, often the library's website) and the "back-end" (catalog/database design) of the catalog. The presenters hold the assumption that patrons still browse library catalogs, and there is value in exposing the full run of a serial, even if it is difficult to display.

The speakers explained the basics of FRBR: a "work" is a concept or an idea, an "expression" is

the version (translation, edition) of a work, a "manifestation" is the publication/format of an expression, and an "item" is the physical item of the manifestation. For their example, they selected the *Atlantic Monthly*, a problematic title with several title changes and different physical formats available.

The record was broken into three different record levels: a "superworkspression" as the umbrella record, manifestation records for each specific format, and item records to show local holdings for each format. In this model, the superworkspression links different media together and identifies family trees and relationships. Editions with substantially different content would get their own superworkspression record. The superworkspression and

manifestation records would be maintained nationally through cooperative cataloging on OCLC; only the item records would need to be maintained locally. The presenters theorized that this model would solve about 80% of cataloging problems.

Most MARC fields and authority data would be captured at the superworkspression level, including all title changes and subject work. The benefit would be that staff would only have to catalog a title once. At the manifestation level, most MARC fields would be limited to numerical identifiers such as ISSN and OCLC numbers, and notes on the physical format. The benefit is brevity, since these records would inherit attributes from the level above. The item record would contain data in MARC Holdings format for

location and coverage. The benefit is that they would be easier to maintain.

The overall thrust of this model is to make access and identification more important than description. This model ties into larger trends that are redefining cataloging ideas, in which stability is not as important. The emphasis is less about absolute mastery, but rather working with what you have, namely, "bricolage." This model, while not perfect, builds on existing strengths in the FRBR model and the MARC format. The presenters theorized that the result would mean more intensive, sophisticated cataloging of fewer records, as title changes would be collapsed onto one umbrella record.

Serials as a Public Service: We're One Happy Family

Jennifer Duncan, Electronic Resources Librarian, Utah State University;
Sylvia McAphee, Serials Librarian, Lister Hill Library of the Health Sciences,
University of Alabama-Birmingham
Reported by Beverly Geckle

Jennifer Duncan and **Sylvia McAphee** discussed their experiences working across departments, in both technical services and public services. Jennifer Duncan has had several electronic resources librarian positions, sometimes reporting to the head of reference and sometimes reporting to the head of technical services. Some of her positions involved working several hours on the reference desk. Currently she works about six hours on the desk. Jennifer encouraged service on the reference desk because it provides feedback. She gave the example that testing a product utilizing trials is not the same as having to use the product with a real patron in real time.

Jennifer also discussed reference staff involved in technical services work. She was able to cross-train a reference librarian in the service aspects of her duties, such as troubleshooting problems. Jennifer also believes in providing direct tech support. Reference can call her immediately instead of trying to resolve the problem on their own. She will often go to the desk or use chat or IM. Jennifer has her direct line on the webpage so patrons can contact her immediately. She is even on call using her cell phone. Duncan encouraged technical services staff to participate in library instruction. It provides an opportunity to give additional

information or clarification to the instruction librarians. She also provides handouts for distance education students so there is a face linked to the contact information.

Duncan has established a webpage with information for the reference staff which includes an FAQ section and she contributes to two library blogs. The first blog is for library staff. Instead of forwarding emails with vendor or provider information of interest to staff she posts this information on a blog. It also serves as an archive and a place for trials information and feedback. In addition, training opportunities can be posted there. There is also a public blog, LiBlog USU, which is a collaboration between herself, the head of collection development and another reference librarian. Jennifer ended by saying that it is important that technical services be marketed and that public services and technical services work together. She thinks in the future there may not be such a dichotomy between the two departments.

Sylvia McAphee has had several years of library experience as a student assistant and a paraprofessional. She discussed the technical services versus public services divide that occurs in many libraries. She stressed that each are the others' patrons. Sylvia described her

personal journey of expanding her work experience to include both technical services and reference.

While in library school McAphee volunteered at the reference desk. Even after her training sessions it took time for her to feel comfortable on her own, without other reference staff around. Now she is comfortable on her own and enjoys it. Sylvia and her department head attend reference meetings and she is also a co-library liaison and has manned the library booth at orientation. The work in public services has made her see a different side to herself and she feels more well rounded. Through this

experience Sylvia has developed leadership skills and an appreciation for teamwork.

After the presentations there was an open discussion with the audience. Much of the discussion was about the conflict or divide between technical services and public services and how to change the situation. Cross training and better communication were stressed. It seems that technical services staff are more willing to work in reference than vice versa. There was a discussion on why this might be. It was suggested that reference staff may have the perception that work in technical services is very rule oriented and are unaware of its flexible aspects.

Betting a Strong Hand in the Game of Electronic Resource Management

Paoshan Yue, Electronic Access Librarian, University of Nevada, Reno Libraries;
Elizabeth S. Burnette, Acquisitions Department, North Carolina State University Libraries
Reported by Mavis B. Molto

This session addressed how to create an e-resource management model to meet the needs of users while using library resources effectively. **Paoshan Yue** began the session by identifying the goal of the electronic resource management, ERM, game: to “manage electronic resources in such a way that the users will get the utmost benefits from the e-resource products and services.” She identified three components of electronic resource management: staffing, tools, and workflows. People choose tools and design workflows; tools stimulate skill upgrades in people and workflow changes; and workflows incorporate people and tools.

At the University of Nevada, Reno Libraries, getting accurate e-journal links and holdings information into the databases quickly and consistently is the top priority. ER lifecycle management is accomplished using the Innovative Millenium ERM, with ER access management provided by the Millennium Web OPAC, Microsoft Access Web Lists, and SFX Knowledgebase Find it software. A detailed flow chart of the University of Nevada, Reno Library’s e-serials workflow is available at <http://www2.library.unr.edu/serials/ERMworkflow.pdf>.

Some suggestions for workflow design in ER access management include: 1) Aim to process data only once and repurpose them for different data stores, 2) Utilize existing tools fully and

creatively and add new tools or replace old with new, 3) Leverage the strengths of your staff and tools and encourage skill upgrades in staff, and 4) Keep library end users in mind.

Elizabeth Burnette followed with a presentation that focused on the electronic resource workflow. Periodic analysis is needed to maintain efficiency, due to changes in serials’ formats and product packaging along with new and improved tools to manage serials. Areas that should be considered are staffing and workflow, especially bottlenecks and backlogs, workflow design, and improving efficiency.

For successful workflows, one should consider department objectives and library goals, and analyze both print and e-resource workflows so as to illuminate the differences between the two. An objective of the workflow review is to hunt for inefficiencies to allow more resources for acquiring e-resources. All processes in the serials workflow should be reviewed: selection, order, payment, access, and storage. The major steps in both the print and the e-resource workflow analysis include: 1) Review existing documentation and policies, 2) Identify steps that have become obsolete, 3) Create and test a revised provisional workflow, 4) Implement the revised workflow, and 5) Establish a process to receive routine feedback.

Suggestions for optimizing efficiency include maximizing staff and integrating workflows. If one decides to integrate print and e-resources processes, as is done at North Carolina State University Libraries, the following steps are suggested: 1) Identify processes being

integrated, the process expert, the cohort being trained, and in what order, 2) Identify the tools used and development needed, 3) Consider current work volume and time needed to integrate, and 4) Communicate.

We All are Winners: Training Silents to Millennials to Work as a Team

JoAnne Deeken, Univeristy of Tennessee;

Paula L. Webb, Delta State University

Reported by Michael J. Hanson

JoAnne Deeken and **Paula Webb** discussed the fact that library employees are various ages and how this can affect training sessions, particularly training related to the rapid advances in information technologies. They used the generational paradigm created by William Strauss and Neil Howe in their book, *Generations: the History of America's Future, 1584 – 2069*, as the basis for breaking people into groups. The four categories they discussed were the Silents, those born between 1925 and 1942; the Baby Boomers, who were born between 1943 and 1960; Generation X, whose birth date falls between 1961 and 1980; and finally the Millennials, who were born between 1981 and 2000.

Deeken and Webb also explained some of the characteristics of individuals in each group and briefly discussed what training techniques the individuals preferred. The long experience of the Silents provides them with a wealth of knowledge. They have a great respect for authority and expect trainers to acknowledge their skills. They take their own notes and respond well to learning from individual study manuals. If the trainer makes connections between what they know and what is going on, it helps them assimilate what needs to be learned. Once they understand a new technology, it becomes part of their knowledge base.

Baby Boomers have less respect for authority than the Silents, but do respect authority that they themselves have established. Although they say they like teamwork, Baby Boomers are concerned about their place in the group and want to be the star. They want to get rewarded so they demonstrate how they are responding to

what is being learned. Sometimes they are prone to policing the other members in the class who might be doing things which do not meet with their approval.

There are fewer Generation Xers than members of other generations. They share a common work ethic, but they express it differently than Baby Boomers, i.e., they work their forty hour week, but they leave work at work. They embrace and expect technological advancements. Generation Xers have an understanding of Boomers and Millennials, and sometimes can interpret one for the other. They need feedback to know that they are doing well.

Some Millennials are still in early education and others are just entering into the workforce. Few are in supervisory positions and they are primarily being trained. Their short attention span causes them to require a trainer to move around the room and do more than lecture. Millennials are multi-tasking all the time. If you want them to focus on you, you must interact with them. Often they are unwilling to stay for any length of time in a particular job. They are gathering experience which they will bring with them to other employers. Millennials desire challenges and excitement as well as constant stimuli. Their life experience with structured schools, sporting leagues, music groups, etc., has caused them to require lots of structure and they depend on mentors.

Deeken and Webb propose that acknowledging the differences between generations and modifying training methods for each group can improve the training experience for all involved.

Straight from the Horse's Mouth: New and Not-So-New Serialists Share Experiences

*Susan Davis, University at Buffalo, State University of New York;
Sarah Morris, Illinois College of Optometry*

Reported by Gail Julian

Susan Davis, a long time serialist and leader in the NASIG organization, and **Sarah Morris**, a new professional and 2006 NASIG student grant award winner, led the audience in a discussion of serials' changes over time and how different generations of librarians view the serials world and workplace today.

Susan has recently been named co-head of a newly created department at her institution. This new department, the Electronic Periodicals Management Department, combines acquisitions and cataloging functions related to electronic resources. Susan recapped her career using slides and photos. She has attended all the NASIG conferences and has over twenty-five years of experience in serials work.

In contrast, in 2005, as NASIG celebrated its 20th anniversary, Sarah was at the halfway point in library school. Sarah originally planned to be a teacher but got a taste of acquisitions when she was an undergraduate working at CRL. She later became a paraprofessional and then attended library school. The audience was then asked to share stories of how they became serialists.

The next part of the discussion revolved around changes that have occurred over the last twenty-five years. Susan recalled using an IBM Selectric typewriter and how much time it took to send claims and correspond through the mail. Sarah shared her experiences of the last five years as resources have increasingly moved to

electronic format and patrons want everything available with one click. The management of electronic resources is much more complex requiring training and documentation. The audience was asked to discuss their experiences retooling existing staff to work with electronic materials.

"What are our roles in the library today?" Susan and Sarah continued the discussion by bringing up issues all too familiar to current day librarians: pricing models, backfiles sold separately, the role of consortia, the "big deal," and the consolidation of publishing. The roles of publishers and agents have also changed, and the role of the platform provider is new to the mix. However, regardless of format, title problems still exist.

The tactics session concluded with a discussion of the generational divide. Serialists of all ages share some common traits. They must be comfortable with change and ambiguity. However, often they do not get as much positive feedback as colleagues in public services. Studies indicate constant feedback is needed by the millennial generation. In addition, how will experienced and newer librarians co-exist? New blood may be needed to reinvigorate an organization, but these newer librarians must be cognizant of the history of the organization. Experienced librarians may not appreciate the ideas of newer librarians. Susan and Sarah concluded by distributing a list of readings on the subject.

Making Sense of Your Usage Statistics

Bob Schufreider, NA Sales Manager, MPS Technologies

Reported by Christine Freeman

"Usage statistics are a key decision making tool and becoming more important." This statement by **Bob Schufreider** was acknowledged by head nods throughout the room. Everyone recognizes that usage statistics are one of the best ammunitions a library has for collection development decisions. The only problem is that the collection / collation of statistics is

sometimes almost more trouble than they are worth. Not many libraries have the ability to have staff devoted to the collection of usage statistics, which means that when statistics are needed librarians spend days collecting / collating statistics from multiple vendors.

The first topic Bob discussed was the University of Tennessee's Max Data Project in April 2006. This project consisted of a survey sent to library directors at more than two hundred sixty Carnegie I and II research institutions. The data returned noted that the average number of vendors that provide some sort of usage report was forty-three. The data also reflected the percentage of vendor reports by resource type: full text, abstract/index, electronic book, and others. Reporting, subscription decisions, justifying expenditures, and other purposes were acknowledged as reasons for using vendor-supplied usage statistics.

The University of Tennessee Max Data Project also helped identify the biggest challenges that libraries face when dealing with usage statistics: lack of consistency / standards, collection / collation takes too much time, and that COUNTER standards help but.... The libraries involved in this survey identified five of the most useful types of statistics for libraries. These include number of full text downloads, searches, sessions, COUNTER statistics, and turnaways.

COUNTER statistics could be some of the most useful statistics in the realm of electronic journals, but Bob asked the group to consider some ideas that COUNTER might be missing. One of the ideas that COUNTER might be missing is that usage reports are title-level only with no indication of whether full text requests are front file or backfile. Another issue to consider when comparing across publishers is that linking to an article renders its HTML, and if a user chooses to select the PDF version, that could count as two downloads. Other things to consider focus on how exposure in Google

Scholar can skew usage, and the lack of benchmarks.

Bob then told the audience about another survey called the UKSG Usage Factor. This survey was completed in two phases. Phase I consisted of personal interviews with twenty-nine authors, publishers and librarians, while Phase II was a broader online survey of librarians and authors. Topics covered in this survey included: reaction to the Usage Factor, what time windows would be appropriate in calculation of the Usage Factor, practical ways to consolidate the information, who would take on that responsibility, and implications for non-COUNTER titles. Results of this survey showed broad support for a usage-based quality measure. If it existed, librarians would rank the usage factor high on their decision-making matrix. Authors, on the other hand, appeared more reticent about changing their behavior based on a new quality measure. Publishers were more mixed in their support, and the library community in general was very interested in a broader standard by which titles can be qualitatively measured.

Though this presentation did not get into all the factors of usage statistics, access was provided to tools that would help libraries collect usage data and learn more about types of usage data. The tools included Electronic Resource Management products, for example, Innovative Interfaces, Exlibris, Serials Solutions, ScholarlyStats, Project COUNTER (<http://projectcounter.org/>) and SUSHI (http://www.niso.org/committees/SUSHI/SUSHI_com.html).

TACTICS SESSIONS, GROUP B

Verbal Bourbon: Speaking Secrets to Intoxicate Your Audience

Jeff Slagell, Director of Library Services, Delta State University

Reported by Stephen Headley

Slagell began by asking the audience their reasons for attending the session. He then provided the purpose for his presentation: to facilitate discussion about improving the attendants' public speaking and presentation skills. Slagell said there were six key elements to productive public speaking: comfort level, gaining attention, organization, presentation

style, discussion, and the wrap-up. The ideas presented would allow the attendants to gain the attention of their audience, communicate effectively, and enact change.

After giving an overview of his presentation, Slagell quizzed his audience on the significance of what he had done thus far in his presentation.

He had injected some humor and interacted with his audience as a warm-up and a way to find out their expectations. Slagell had used a humorous story to emphasize a point and he had given an overview of his presentation. A sizable portion of this was done very casually; but he pointed out that it was all very intentional and served a purpose.

The first element of effective public speaking is for the speaker to establish a good comfort level. Slagell emphasized that practicing a presentation was very beneficial. The presenter could practice front of a mirror, in front of a colleague or small group, or have the presentation videotaped and reviewed. He also offered visualization as a way to mentally prepare for a successful presentation.

Secondly, the speaker must gain the attention of the audience. Slagell stated that the use of humor is very important, but that the speaker must beware of anything that could be construed as offensive. An important aspect of gaining the audience's attention lies in listening carefully when they provide feedback. Other ways to gain the audience's attention are: showing visuals, the use of props, and the physical characteristics of the speaker, such as voice inflection and movement during the presentation.

The next factor Slagell presented was organization. He emphasized that a presentation should have three important pieces: an introduction, the body or content of the presentation, and a conclusion. He emphasized the importance of making the content interesting to the audience. Slagell also warned the audience to keep to the topic and not get sidetracked. He advised that it is difficult to keep the points together at times, but not doing so

would leave the audience without a sense of the objective of the presentation.

Another key ingredient to a successful presentation is the presentation style. A speaker must first determine the mechanics of the process. This includes the decision whether or not to use audio-visual equipment or simple handouts to support the presentation. Equally important as the mechanics of the process is the method used by the speaker. Slagell strongly emphasized that the presenter needs to express energy and enthusiasm throughout the presentation. He stated that nonverbal aspects of a speaker's method are just as important as what is being conveyed verbally.

Another necessary component of a successful presentation is allowing time for discussion. Slagell pointed out that this creates a "synergy" with the audience. However, in order to make this effective, the speaker must be an active listener, so that the audience knows that their feedback is acknowledged and that their point of view is truly understood.

The final element of a good presentation is the wrap-up. The speaker needs to keep track of the time, especially allowing for the discussion period. The presenter must "know when to stop talking." The wrap-up can leave a positive effect if an "attention-gaining device" is used at the end of a presentation, such as the humorous story that Slagell used at the end of his presentation.

Slagell concluded by encouraging the audience not to be afraid of making presentations or speaking in front of audiences. They should use the ideas he provided to share the information and ideas that they have, so that their organizations can benefit from them. In this way they can foster effective communication and enact change in their organization.

ERM on a Shoestring: Betting on an Alternative Solution

Dalene Hawthorne, Head of Systems and Technical Services, Emporia State University;

Jennifer Watson, Head of Electronic & Collection Services,

University of Tennessee Health Sciences Center

Reported by Virginia A. Rumph

Jennifer Watson and **Dalene Hawthorne** presented two options for keeping track of licenses and invoices for electronic resources. At Tennessee, a FileMaker Pro database is used for individual title information. It automatically generates URLs for the catalog's

856 fields, and HTML for their A-Z list. The advantages: ease of use, no IT help needed, no subscription fees, generates static URLs, and links to other databases. However, the disadvantages include: the A-Z list cannot be incorporated into the new website's content

management system, it doesn't include licenses and invoices, and the software must be installed on each computer, adding to expenses and training time.

The Health Sciences Center adapted Blackboard to manage licenses and invoices. The pluses: already installed on campus with no additional cost, ease of use, no software to download, different levels of privileges can be set, and it is accessible from anywhere. The negatives: no integration with other ERM systems, title linking is difficult, and a dependency on campus support. Jennifer regards Blackboard as an interim measure until their EMS can handle invoices and licenses.

The EMS was created using MySQL and Ruby on Rails (a Web application development framework). The e-journals Web page is automatically populated, can be updated quickly, and works well with their content management system. Jennifer thinks the best part of this EMS is its use of "smart" URLs which link each title on the A-Z list to the EMS, allowing usage statistics to be generated for all titles. Loading data into the link resolver has improved, too. Since it is Web-based, no software is needed, it is accessible from anywhere, and it is easy to use. However, it requires a skilled IT person to create and maintain.

Currently, the Health Sciences Center employs FileMaker Pro to house usage statistics,

Blackboard for invoices and licenses, and the EMS for everything else. However, the goal is to get all the information into the EMS. This home-grown system meets their electronic resources management needs because they do not subscribe to many database packages (notoriously volatile). Their systems are easily customizable, and cheap to set up and maintain, thus freeing money for more journal subscriptions to meet patron needs.

Emporia State has not purchased an ERM yet, has not been registering e-journals, wasn't tracking licenses well, and relied on Serials Solutions to handle database content changes. When the decision was made to get better control of their electronic resources, Emporia assigned responsibility for e-resources tasks to the appropriate staff, and subscribed to EBSCOHost Electronic Journals Service Enhanced version (EJS). Suppressed brief bibliographic records are stored in a password-protected e-reserves course with attached scanned licenses and invoices are entered in the acquisitions module. However, usage statistics are not being collected regularly. EJS is being used as a registration tracker, to supply end user access notes, to create an A-Z list, and to generate administrative alerts. Emporia has been satisfied with this combined solution to electronic resource management, but, unlike the Health Sciences Center, they subscribe primarily to databases. Dalene doesn't think their approach is scaleable to large institutions.

Risky Business: Outsourcing Serials Cataloging

Faye Leibowitz, University of Pittsburgh

Reported by Kurt Blythe

Leibowitz's presentation arose from her experiences managing an outsourced cataloging project for a collection of serials at the University of Pittsburgh's Graduate School of Public and International Affairs and Economics Library. The GSPIA/Economics Library's serials and monographs ostensibly serve a wide range of research, but were nonetheless difficult to access. These materials had not been included in Pittsburgh's previous retrocons, and were only accessible via an incomplete shelf list. Beyond that, the collection was classified using a local, hybrid classification system. In point of fact, access was primarily afforded through browsing.

When the decision was made that the collection needed to be made accessible from the online

catalog, grant funding was sought for an outsourcing project. After analyzing the collection to determine the scope of the project, Leibowitz won a \$75,000 grant. This grant would fund the outsourcing of approximately 7500 volumes of which 1200 were serial in nature. OCLC TechPro contracted to do the retrocon inside of one year.

Since the shelf list was incomplete, actual volumes were shipped to OCLC in lieu of cards; but only those volumes embodying major changes or first and last issues of a run were sent. This process required a great deal of prep work to be done by Pitt's library staff. Students performed much of this work, checking OCLC to discover if any records relating to materials in

the collection were already held, to follow up on 780 and 785 fields, and forwarding all available information to a librarian for vetting. Few title changes were found, and most serials consisted of short runs or single issues. OCLC was instructed to use CONSER records when available and serials were flagged before returning to the library so that holdings could be added.

Leibowitz's experiences illustrate that serials cataloging is much more difficult to outsource than monographic cataloging. The application of a cataloger's judgment in determining major changes versus minor or recording designations breeds inconsistencies in treatment. These inconsistencies are compounded when OCLC's catalogers evaluate each volume of a title separate from the others rather than in the context of a library catalog, resulting in volumes from the same title being variously cataloged as

serials and monographs. Often, OCLC's decisions conflicted with Pittsburgh's policies. At the same time, the student labor used in the preparatory phase and to process volumes returning from OCLC was often unsatisfactory due to the steep learning curve associated with training students and their lack of knowledge.

In the end, Leibowitz determined that she may have been better served had she been able to use her funding to hire full-time temporary workers to do the retrocon in-house. With so much work required of the outsourcing institution before and after materials were handled by OCLC, and with the knowledge of students generally insufficient to the task, combined with the judgment of offsite catalogers sometimes in conflict with that of the outsourcing institution's policies, it seems preferable to keep serials at home.

EDI (Electronic Data Interchange) for Libraries, Publishers, and Agents: The Reality Show—SUSHI, ONIX, and ??

Tina Feick, Swets Information Services

Reported by Valerie Bross

Tina Feick's electric presentation countered the stereotype that standards are dry. Beginning with the Berlin Airlift and ending with Tina's dream for the future, the session spanned a half-century of standards development.

The first standard—the grandfather of the bunch—is EDI. Electronic Data Interchange entails the computer-to-computer exchange of data according to a specified format agreed to by all parties, with no human intervention. This was a revolutionary concept in 1945, and in some senses remains an ideal.

Within the serials community, EDI took off in 1979 with ICEDIS (International Committee on EDI for Serials) and, in the 1980s, with the SISAC SICI (Serials Industry Systems Advisory Committee's Serial Item and Contribution Identifier). Fritz Schwartz, in whose name the NASIG award was created, helped develop and promote use of EDI standards. Many NASIG members first learned not to fear these new technical standards through his excellent workshops and patient explanations. By 1992, EDI had been implemented for agent-to-publisher/publisher-to-agent transactions

(orders, renewals, and transfers), as well as some library-to-agent/agent-to-library transactions (invoices, packing lists, claims).

Of more recent vintage, ONIX for Serials (ONline Information eXchange), under the auspices of EDItEUR, provides a family of XML-based standards for communicating data among agents, publishers, and e-resources management systems (ERMs). ONIX for Serials standards include: SPS (serial products and subscriptions), SOH (serial holdings), and SRN (serial release notification). The latest in the suite of standards is ONIX for Licensing Terms, the first draft which was released in March 2007.

SUSHI addresses a much different problem than either EDI or ONIX—the problem of statistics collection. SUSHI, or Standardized Usage Statistics Harvesting Initiative, is a protocol that formats data so that ERMs can more efficiently load it. By combining SUSHI-based data with payment data, a library can create useful management reports of, for example, cost-per-use.

Finally in Tina's dream-world, all standards are in place and fully implemented; library automation systems use the same standard;

manual work has been reduced; and the librarian finally has time to focus on issues of quality.

Creating a Local Print Repository for State Consortium Online Purchases

Douglas P. Kiker and Jay Wiese, University of Florida

Reported by Selina Lin

The presentation entitled, "Dim Archive Project 2004-2007: an Experiment in Creating a Local Print Repository", details the University of Florida's project in 2003 to begin a statewide cooperative effort to preserve an archival print copy of each online journal from Springer/Kluwer. The University of Florida is a member of the Florida Consortium of eleven public universities which joined together for this project. Springer/Kluwer is one of the six large publisher packages acquired by the consortium. Each participating institution agreed to maintain and house print copies of a designated publisher package. The rationale for the project was "apprehension about no longer maintaining a print version in any state university collection."

The number of journals in the Springer / Kluwer package totals 1,324, of which 361 titles, 3,605 issues, have been processed in this experimental pilot project. These journals were received and labeled using a locally designed macro and efficient automated workflow to create item records in the ILS. In all, 45.5 hours of staff time was spent over 200 weeks to process 361 titles which are housed in 91 archival boxes. The end result is approximately 136 linear feet and 3.3 sections of storage space in the University's Auxiliary Library Facility (ALF). There are 5000 titles remaining for the entire consortium to process.

Little Things Mean a Lot

Bob Pershing, University of Pennsylvania Library;

Eve Davis, EBSCO Information Services;

David Horwitz, SAGE Publications

Reported by Susan Markley

Bob Pershing, Eve Davis, and David Horwitz represented the various constituents in the publishing game. They each presented some of the common annoyances they face each day which in turn have a cumulative impact on their daily activities and workload. Although these minor complaints are often rather humorous, they do increase stress and workflow problems for all involved.

One of the "small" issues that libraries face include postal regulations for bulk mailings which limit the number of characters on the mailing label so items continually are sent to the wrong location. Added to this annoyance are postal charges not included in the publication price so the journal is not even sent to the library. Then there are hidden fees bundled into the journal's actual cost, making it difficult to determine the service charge. Another nuisance mentioned was the small notification postcards sent by fulfillment centers that extend your subscription one month when claims are placed. In addition, unanswered claims are always a

major concern. Libraries often have a real problem with the numbering system of many journals that follow no logical arrangement or units, making check-in and claiming very problematic.

Publishers and vendors complain that university accounts payable and procurement departments are often rigid about exact payment and about receiving e-mails instead of written letters. Publishers often find that their automated or bulk e-mails to libraries end up in university spam files. Universities often use confusing acronyms for their buildings or libraries, making it difficult for the publishers to recognize who is actually subscribing to the journal. Publishers have problems with libraries that claim too soon or too often, not allowing time for the problem to be resolved. They also find libraries try to circumvent publisher policies by trying to cancel requested titles after the subscription has already begun.

Vendors have problems with fulfillment houses that start subscriptions immediately after the order is received rather than waiting until the start of the year and volume. There is also the problem of renewals or invoices sent after the cancellation period has ended.

In the new electronic serial world, additional problems have emerged, such as registration and activation headaches. Why is there a need to re-register year after year and why can't

vendors register for the library? In addition, automated e-mail responses from publishers that don't include your initial question rank high on the list of petty annoyances.

The session concluded with this piece of advice: you can make a difference by complaining loud and clear. Publishers do listen if enough people complain. This was truly an excellent suggestion for an enjoyable presentation.

Alternatives to Licensing of E-Resources

Zachary Rolnik, Now Publishers;

Selden Durgom Lamoureux, University of North Carolina, Chapel Hill

Reported by Kyle Winward

Zachary Rolnik began the session speaking about the context of licensing, and how an increasing acquisition in digital content during the 1990s led to a shift in emphasis from copyright law to contract law for licensing. The consequences have been higher costs, bottlenecks in the ordering process, access being delayed or never initiated, and large publishers, with large resources, being favored over small publishers. The cumulative effect is that library patrons are not well served, library financial resources are not maximized, and small publishers are frequently under-represented in many libraries' online collections.

Rolnik next spoke about the challenges for small publishers in creating licenses, including the cost of creating a license, attorney fees, and that three quarters of all licenses require some revision. Rolnik added that he has never responded negatively to requests to change terms, but that the process results in a minimum delay of weeks and sometimes several months.

Selden Durgom Lamoureux followed with information concerning previous presentations on the problems of licensing at the 2005 Charleston Conference and other conferences - the response was enthusiastic for licensing alternatives. At the Charleston Conference, Oliver Pesch (EBSCO) spoke with Lamoureux, and this conversation inspired a working group of librarians and publishers, which formed the NISO Shared E-Resource Understanding (SERU) Working Group (<http://www.niso.org/committees/SERU/>).

The first step the working group took was to divide a license into three parts: contract (legal)

boilerplate, business terms, and the remainder of the license. The next step was discarding the contract boilerplate, moving the business terms to a purchase order, and focusing on the remaining content. There was a general consensus about what constitutes a site, who is a user, what are appropriate and inappropriate use, confidentiality and privacy, online performance and service, and archival and perpetual access.

Rolnik followed with the reasons why a new model could work, including the significant and shared experience of publishers and librarians with e-resource licensing, and a high level of trust based on the amicable resolution of problems. For example, there have been fewer than five court cases between publishers and libraries for license violations in the past few years, and there is strong motivation to find a licensing alternative.

Lamoureux provided more details on SERU, and emphasized that it is a mutual understanding between libraries and publishers in which they forego a license agreement and instead rely on SERU and copyright law. SERU is not a replacement for all license and contract agreements, nor is it a standard license or license of adhesion. SERU's next steps include a Draft Recommended Practice for Trial Use (version 0.9), a registry of participants, and a formal NISO review process in 2008. The speakers encouraged interested parties to register on the SERU website - the registration form isn't currently online but should be soon. A very interactive and informative round of questions and answers followed.

POSTER SESSIONS

Reported by Sally Gibson

There were fourteen poster sessions at the meeting this year. It was the largest number ever presented at a NASIG conference. The topics covered included: the CONSER standard record, managing electronic resources,

consortial partnerships, usage statistics, and relocating departments and journal collections. Unfortunately, I was not able to view all of the poster sessions.

Hedge Your Bet to Improve the Odds of Going the Distance: Dental Theses Journal Citation Analysis

Janice Cox, Indiana University

Dental students rely on scholarly literature from core dental journals as well as a diverse selection of journals representing other medical disciplines. When considering collection development the emphasis and expenditure

should be on the most recently published. The acquisition of e-journal backfiles is not critical since students use current journal citations and a print backfile is readily available.

Taking a Gamble: Venturing into the Development of an Electronic Resources Management System

Nancy Beals, Wayne State University

When developing and implementing their ERM system, Wayne State University used the following key factors: determining user groups and their needs; implementations and technical

issues; testing the system; analyzing how the system will be used; setting future goals; and acknowledging outside considerations.

Maximizing Access through Consortial Partnership: Mississippi State University Libraries' Journal Expansion Project

Patrick Carr, Mississippi State University

Mississippi State University Libraries participate in several consortial partnerships to gain online access to journals in which one partner library maintains a subscription. Many libraries have a subscription to the same journal. In order to gain access to additional journals, MSU

identified their journals which were duplicated by other libraries. The library was able to cancel the duplicate subscriptions and begin a subscription to sixty new titles which further expanded their access to e-journals.

Coming Down the Backstretch of Moving Technical Services Out of the Library and into a Dedicated Facility: Will This Be a Long Shot or a Sure Bet?

Germaine Wadeborn, UCLA

During July 2006 to March 2007, the UCLA Library moved its technical services operation to an off campus location and it reorganized the Serials and Monographs divisions of the Print Acquisitions department. Seven full time employees were transferred to the Print

Acquisitions department. This resulted in a redesign of workflows. The technical services department faced the challenge of developing new workflows; creating a new organization; and maintaining quality and timely service while moving to a new location.

“Yes, As a Matter of Fact, We Are Throwing Those Away”: A Small Public University Deals with De-Selection

Randall Watts, University of South Carolina Aiken

After an extensive renovation to the library building did not result in additional space, the library examined the non-current print titles as a potential source for space. Criteria for de-selection were established and the titles identified. Any requests to add the journals to

departments were denied since the library did not want to encourage the creation of departmental libraries. The faculty was informed of the de-selection of the journals and their silence was viewed as consent.

Partners in Space: Integrating Periodicals and Government Documents

Janette Prescod, University of Tennessee

The creation of an Information Commons required a reorganization of library space. The Periodicals and Government Documents units were combined as a way to address the need for additional space, the challenge of staffing two

service desks, and the issues of workflow. The result was increased study areas and work spaces, public services concentrated on the first floor, and the identification of inefficiencies and low-priority processes.

Designing a Local Database for Usage Statistics

Brian McDonald, SUNY College at Oswego

The library designed their own database to manage and present usage statistics for journals in all formats. Due to budget concerns and the need for greater flexibility, the library created a usage database that was built on a Microsoft

Access database rather than purchase an ERM product. The data is stored in three tables and queries are used to combine the tables and produce various reports. More information is available at <http://oswegoserials.pbwiki.com>.

“I Need to Find an Article on...”: What Librarians Need to Know about How Patrons Look for Journal Articles on the Library Web Site

Sarah Sutton, Texas A&M University, Corpus Christi

The library is in the process of concluding a two year website redesign. It conducted user centered evaluations using formal usability tests among the undergraduates. The evaluations

were a basis for both redesign decisions and determining undergraduate information seeking behaviors.

The CONSER Standard Record

Les Hawkins and Hien Nguyen, Library of Congress

The CONSER standard record launched June 1 and is projected to save twenty to twenty-five percent of the time needed to create current serials records. It will apply to all formats,

replace existing multiple record levels and reduce serials cataloging costs. Additional information is available at <http://www.loc.gov/acq/conser>.

Using Open Source Software to Build Your Tools

Laurentiu Mircea Stefanu, University of Illinois at Chicago

Cat Stats was created to gather daily, monthly, and annual cataloging statistics. The manual method of gathering statistics was prone to error. Cat Stats allows the same tasks to be performed faster, easier, and more accurately.

It uses PHP at the front end and MySQL at the back end. Advantages to using custom built tools are that they can be adjusted as needed. The disadvantage is the need to maintain in-house expertise.

The SUPERFECTA - The Best Bet for Winning the Electronic Derby

Rebecca Martinez, Rutgers University

Rutgers University Libraries developed a team approach to handling the workflow for electronic resources. The team consisted of members from the Acquisitions Department and the Distributed Technical Services Department and

it utilized a communication email listserv. The creation of the team eliminated confusion on who to contact for what; removed failure points; and developed and expanded staff expertise and awareness of electronic resource material.

A Comparison of Journal Impact Factor to Journal Use in a University Library

C. Derrik Hiatt, Brigham Young University

While the journal impact factor has been used as a selection tool for academic libraries, few studies have been conducted to determine how closely it parallels journal usage by students. Ninety journals were examined in four disciplines. There is a statistically significant

correlation in history and geology but no correlation in business or organic chemistry. The results do not support using the journal impact factor as a predictor of use since the correlation of the impact factor to usage is tied to discipline.

Making a Silk Purse from a Sow's Ear

Chandra Jackson, University of Georgia

Comprehensive Serials Information Databases Eases Journal Cuts

Raleigh Muns, University of Missouri-St. Louis

USER GROUP MEETINGS

ER&L

Jill Emery, University of Texas Libraries;

Dana Walker, University of Georgia Libraries

Reported by Lola Halpin

Electronic Resources & Libraries is a conference that has been held for the last 2 years. The conference was developed as a result of a survey done by Bonnie Tijerina of Georgia Tech. See <http://electroniclibrarian.org/moodle/>

At the 2007 conference Jane Burke gave a presentation on ERAMS (Electronic Resources Access & Management Systems) and emphasized the need for more collaboration among people and systems.

There was an ER&L forum at ACRL and another will be held at ALA annual in Washington at the Hawk 'n' Dove. The goal is to get more contributors who are working in the e-resource spectrum to ask questions, offer suggestions and work collaboratively.

The following questions were discussed:

1. If the belief that we need an ERM Knowledge Base (KB) is valid what can we do to improve the KB?
2. How should libraries manage staffing for e-resources? If 60-70% of the budget is spent on e but only 20-30% of the staff there's a gap – and – typically managing e requires more staff and at a higher level and training is labor intensive.
3. What's still holding us back from driving the market? We created home grown systems and stopped when vendors started creating ERMs.

The audience included publishers, agents, system vendors and library staff. The discussions of each question led to many more questions and proposals. There was general agreement that we not only need standards but that we also need adherence to standards. Everyone was urged to develop an

understanding of the issues and to talk to their various contacts.

The ER&L has provided space on their site to make contacts, ask and receive information, see <http://www.electroniclibrarian.org/forum/>

Endeavor

Maggie Rioux, Woods Hole Oceanographic Institute;

Bob Persing, University of Pennsylvania

Reported by T.J. Kao

Maggie Rioux began this meeting by giving some updates from the last Endeavor End User Group conference. Both Aleph and Voyager will continue to exist. Ex Libris will continue its support of Voyager at least till Voyager 8.0. At this point, there is no information on what will happen next. There will be no more Endeavor End User Group. Both Aleph and Voyager users will become members of one of the two Ex Libris user groups, ELUNA for North American users and IGeLu for other users. The 2008 ELUNA meeting will be held in Long Beach, California. In order to be more involved in the process, for example, being a member of the Steering Committee, an institution needs to pay dues. The previous enhancement work group will be replaced with the Voyager Product Working Group. In addition, other Endeavor products, such as OpenURL and the ERM product, will be replaced with Ex Libris equivalent products.

Three issues were raised by attendees. One is the concern regarding interoperability between SFX and Verde. A librarian sent an e-mail to Voyager-L mentioning some problems after migrating data from SFX to Verde, including holdings not being imported into Verde correctly, and the collapse of the SFX database. One attendee suggested that the Massachusetts Institute of Technology might be able to provide some insights on this issue. The other issue is about the continuing support for Meridian in the post-Endeavor era. Maggie replied that the support might end in 2008. However, for users who purchase the software and install it on their local servers, there should not be any disruption on their usage. Another issue concerns the timeline of migrating SFX from MySQL to Oracle. Maggie responded that the migration might happen sometime by the end of 2007.

SirsiDynix

Sharon Dyas-Correia, University of Toronto;

Jane Grawemeyer, SIRSI Dynix

Reported by Sharon Dyas-Correia

Almost thirty five SirsiDynix customers attended the NASIG joint Unicorn and Horizon informal user group meeting. **Sharon Dyas-Correia**, SIRSI Serial Enhancements Forum Moderator, began the session by welcoming everyone, presenting a basic agenda and introducing herself and **Jane Grawemeyer**, SirsiDynix Technical Product Manager. Sharon reminded attendees of the enhancement process for SirsiDynix products and encouraged users to actively participate on SirsiDynix lists and enhancement forums.

Jane Grawemeyer then gave an informative summary of improvements scheduled for release with the product Rome later this year. Enhancements discussed included improvements to sorting options for received

issues and prediction as late reports; a serial control not linked to the vendors' report; and a report on serial controls without predictions. Enrichments to MARC holdings report selection criteria, as well as improvements to MARC holdings report output, MARC holdings export, and CONSER pattern loading support were also discussed.

Improvements will also include: a new dialog box to alert receivers when there are no more expected issues, a deleted issues tool button on the received tab, a delete received issues report, and a print serial issue label report. In the near future, it will also be possible to have ISSNs appear on printed serial claim notices.

A question and answer period followed Jane's presentation and there was considerable discussion of future directions and product development. Many tips and tricks were shared

as well. Sharon asked if there were any final questions or comments and adjourned the meeting when the allotted time was finished.

NASIG BUSINESS MEETING MINUTES
JUNE 1, 2007, LOUISVILLE, KENTUCKY
Joyce Tenney, NASIG Secretary

CALL TO ORDER AND WELCOME (NOVAK)

At 12:35 p.m., June 1, 2007, Denise Novak, NASIG President, welcomed everyone and called the meeting to order. She announced Beverley Geer would serve as the parliamentarian for the business meeting.

HIGHLIGHTS OF THE PAST YEAR (NOVAK)

Novak reported that NASIG moved membership renewal to an online process this year and thanked all of those that made it happen. She noted that an RFP for the technology functions of NASIG had been drafted and released for responses.

Novak relayed greetings from Paul Harwood, chair of the United Kingdom Serials Group. Mr. Harwood was unable to attend the conference but sent best wishes for a successful meeting.

She encouraged everyone to complete the online evaluation form. Everyone who completes an online evaluation form, using the email that they used to register for the conference, will be entered in a drawing for a free conference registration for next year. There is a link to the online evaluation form on the NASIG Conference website.

INTRODUCTION OF THE 2006-2007 EXECUTIVE BOARD (NOVAK)

Novak introduced the Executive Board members for 2006-2007. Char Simser (Vice President/President-Elect), Mary Page (Past President), Joyce Tenney (Secretary), Rose Robischon (Treasurer), Members-at-Large Rick Anderson, Adam Chesler, Katy Ginanni, Kim Maxwell, Alison Roth, and Bob Schatz. Novak expressed sadness over the recent death of NASIG Treasurer Rose Robischon.

SECRETARY'S REPORT (TENNEY)

Highlights of the May 2007 meeting of the NASIG Executive Board:

- The official P.O. Box for NASIG will be changed to a New York address to align with the state in which NASIG is incorporated. The change should take place this summer.
- The 2006 *NASIG Proceedings* will have a memorial to Rose Robischon, NASIG Treasurer.
- The board is working to coordinate and update the technological components of the organization, such as online voting, membership renewal and online conference registration. To this end, an RFP for technology has been issued and responses will be reviewed this summer.

TREASURER'S REPORT (NOVAK)

Novak asked for a moment of silence in memory of Rose Robischon, NASIG Treasurer. Novak relayed the arrangements for Robischon's memorial service in New York. Also, she noted that the 2006 *NASIG Proceedings* will be dedicated to Robischon.

Novak reported that the NASIG balance sheet looks good. This was the first year that members joining or renewing could make a donation to NASIG via the membership form. It was a great success. \$4,075 was donated as seed money for new scholarships. She noted that NASIG is in sound financial position, and she thanked the membership for their support.

INTRODUCTION OF THE 2007-2008 EXECUTIVE BOARD (DAVID BURKE AND GAIL JULIAN, CO-CHAIRS OF THE NOMINATIONS & ELECTIONS COMMITTEE)

Burke encouraged all members to complete a nomination form. Nomination forms were included in the conference registration packet, or they are online on the NASIG website. He thanked all of the Nominations & Elections Committee members for their hard work this year.

Burke introduced the new board members for 2007-2008:

Jill Emery (Vice President/President-Elect), Peter Whiting (Treasurer), Members-at-Large Anna Creech, Kim Maxwell and Jeff Slagell.

Burke thanked all who had participated in the process.

OUTGOING COMMITTEE CHAIR AND BOARD MEMBER APPRECIATION AWARDS (SARAH SUTTON)

Novak and Sutton presented awards to all outgoing committee chairs and board members.

All were thanked for their hard work this past year.

NEW BUSINESS

Novak asked for any new business. None reported.

OLD BUSINESS

Novak asked for any old business. None reported.

Novak adjourned the meeting at 12:50 p.m.

NOTES FROM BRAINSTORMING SESSION ON “WHY IS IT DIFFICULT TO GET PEOPLE TO RUN FOR EXECUTIVE OFFICE OF NASIG?”

Joyce Tenney, NASIG Secretary

Session held June 2, 2007 from 4 p.m.-5 p.m. during the NASIG Conference in Louisville, Kentucky, and moderated by Katy Ginanni.

Approximately 90 people attended the brainstorming session.

Ginanni thanked all for coming and opened the discussion with the following two questions.

1. Why do you think people choose not to run for vice president/president-elect and treasurer?
2. What would it take for you to run, or what would make it easier to hold office?

There was discussion of the Nominations & Elections Committee's (N&E) procedures and ground rules for the discussion. Ginanni noted that the N&E committee had received 30 nomination forms this year. There were 16 nominations for VP/PE (a total of 8 people) and all declined to run. There were 9 nominations for treasurer and 2 accepted. N&E did eventually get one nominee willing to run for VP/PE, and then a petition candidate was added. Katy asked why we were not getting more candidates for these offices.

Some comments from the floor were:

- The reason NASIG members don't run is the amount of work required.
- Unclear about how to get enough experience to qualify to run.
- Need to know more about the N&E process. What is weighed the most heavily in

evaluating nominees? What NASIG path is needed to make it on the ballot?

- There is a perception that being VP/PE or treasurer is a huge job. Need a way to get past the perception and make it more clear what the time commitments are for each position.
- Some had been nominated several times, but never made it to the ballot. More information is needed to clarify the N&E procedures and evaluation process. This should be provided on a yearly basis; treat each year like an incoming class of students and repeat the education process every year.
- Misperception that it is a closed loop. Need to let all members know that everyone is eligible and encouraged to put their name forward. Need to educate members on process. Ginanni reminded everyone that the board does not approve the slate of candidates that N&E presents. The Nominations & Elections Committee is entirely in charge of that process.
- When nominees are contacted they should be given information on the time commitments and a contact of a former board member in that position to discuss the job and any concerns.

Several past presidents and officers spoke to the rewards and work involved in the positions and how they managed the workloads.

Ginanni introduced the idea of hiring an association manager at some point in the future

for NASIG administrative functions. There was a discussion of what an association manager would do, how it might be funded and the possible need for new revenue sources.

Other ideas from the floor on this topic were:

- Florida Library Association has such a manager; NASIG might want to look at their model.
- Maybe need to rethink duties of VP/PE and treasurer; may need to add a position to make workload more manageable.
- Possibly find a retired NASIG member that would be willing to work part time or volunteer time to assist these positions.

- Maybe it is time to re-evaluate the founding principles. Can the non-commercialism ban be discussed in the context of raising money?

Time ran short for the discussion and Novak announced that the notes of the meeting would be posted on either the NASIG Moodle site or the NASIG blog, so the discussion could continue. Ginanni noted that the Nominations & Elections procedures documents will be posted on NASIG's website, so members can see the process and continue the conversation.

All were thanked for attending and the discussion will continue after the conference.

**22ND ANNUAL CONFERENCE (2007)
LOUISVILLE, KENTUCKY
CONFERENCE PHOTOS**



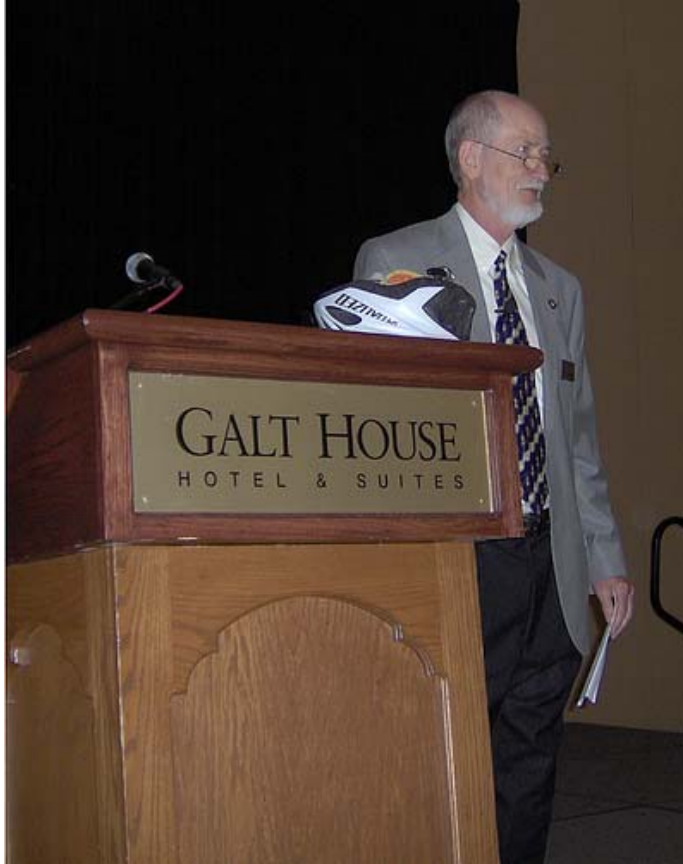
22nd NASIG Conference in Louisville.
Photo by Char Simser.



CPC Co-chairs Angel and Tyler. Photo by Char Simser.



CPC at the Registration Desk. Photo by Char Simser.



Opening session speaker Tom Owens. Photo by Char Simser.



Vision speaker Bob Stein. Photo by Char Simser.



Vision speaker Daniel Chudnov.



On the way to the Frazier Museum. Photo by Char Simser.



Exhibit at the Frazier. Photo by Char Simser.



Dinner at the Frazier. Photo by Char Simser.



Vision speaker Karen Schneider and Anna Creech schmooze at the Frazier. Photo by Char Simser.



Public art horse and jockey.



Louisville Slugger Museum. Photo by Char Simser.



Public art bike rack.



Public art chandelier and, yes, that is a penguin.



Carol Green and friend.



2007 award winners. Photo by Char Simser.



Brainstorming session attendees with moderator Katy Ginanni.



Early crowd at the brainstorming session.



Jonathan David Makepeace makes a point at the brainstorming session.



More people at the brainstorming session.



Sunrise on the Ohio River. Photo by Char Simser.



Outgoing committee chairs Paoshan Yue and Adolfo Tarango and outgoing board member Adam Chesler.



The passing of the gavel. Outgoing president Denise Novak and incoming president Char Simser.



And it's on to Arizona. 2008 CPC co-chair Cory Tucker and the winner of the Arizona tee shirt door prize.

NOTES FROM THE BOARD WRAP-UP SESSION

June 3, 2007, 1:00 p.m., Louisville, KY

Joyce Tenney, NASIG Secretary

- Novak reported on a fundraising idea that had come up during the conference. A possible NASIG cookbook. The idea is being investigated and Novak will report back on this idea.
- Creech reported that ECC had asked if NASIG-L was still needed, as we have several other venues of communication. After discussion it was decided that NASIG-L is still valuable and needed. Creech will relay that to ECC.
- Overall conference feedback so far has been very favorable. Minor issues were discussed and liaisons for next year's PPC and CPC will report back to those groups.
- Timing of brainstorming session was discussed and ideas for improving next year's experience with this.
- Schatz reported that Bylaws Committee has looked at the bylaws amendment for the term of the treasurer and had some questions. After some discussion on the implications of the term of the treasurer and treasurer in training, it was decided to continue the discussion during the July board conference call.
- There was a great deal of discussion on the brainstorming session and how to keep the discussion continuing with NASIG members. It was noted that there was too much input from past presidents and board members; the discussion needs to take place within the membership. It was decided that NASIG-L might be the best forum for this discussion.
- Many ideas were discussed for improving the process of N&E and Novak will continue discussion with N&E next year.
- Schatz suggested getting a NASIG table at ALA to get more exposure for the organization. There was agreement to look at the idea. Schatz will get info on cost and report back to the board.

2007 CONFERENCE EVALUATION SUMMARY REPORT PLACE YOUR BET IN KENTUCKY: THE SERIALS GAMBLE May 31-June 3, 2007

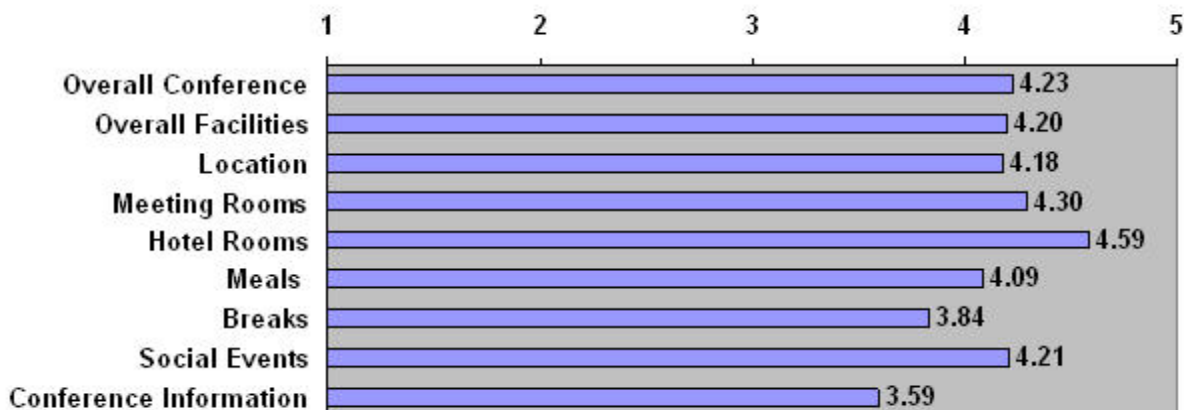
2007 Evaluation & Assessment Committee

Joe Badics, Carole Bell, Jana Brubaker, Sarah Corvene, Susan Davis, Lee Krieger,
Anne Mitchell (Chair), Martha Spring, Lori Terrill (Co-Chair), Alison Roth (Board Liaison)

NASIG's 22nd annual conference was held in Louisville, Kentucky, at the Galt House Hotel. The conference began with a selection of preconference workshops, held its opening reception at the Frazier International History Museum and finished up with a bus tour of historic Louisville. This year's conference again included a variety of vision, strategy, and tactics sessions.

Two hundred ninety-seven conference evaluations were submitted this year, a 54% response rate. Although both print and online evaluation forms were available, attendees were strongly encouraged to submit their evaluations online. 98% of respondents used the online forms, and those who provided their names and contact information were automatically entered into a drawing for a free 2008 conference registration. The winner of the drawing will be announced on NASIG-L.

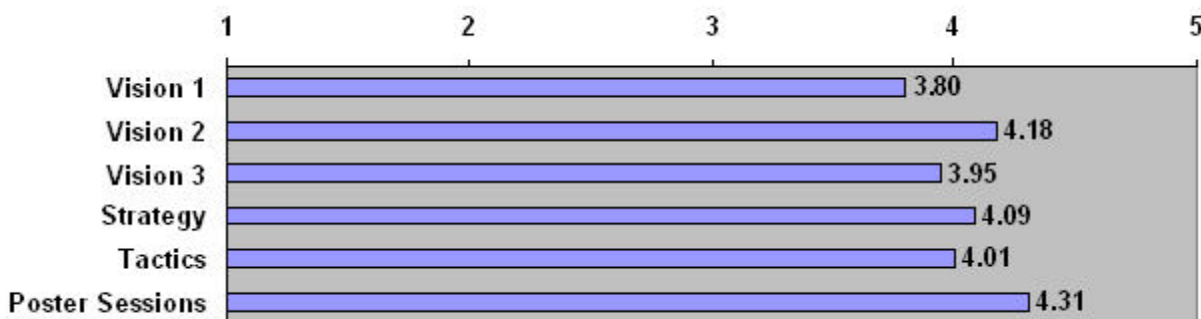
CONFERENCE RATING



On a scale of 1 to 5 (5 being high), survey respondents gave the 2007 conference a rating of 4.23. The attendees rated the overall conference facilities and local arrangements at 4.20. Comments indicated general approval of the hotel and environs. The Louisville location rated slightly lower than Denver (4.51) at 4.18. The meeting rooms (4.30) and hotel rooms

(4.59) received a slightly higher rating than last year. The meals (4.09) and breaks (3.84) rated somewhat lower than last year, and comments suggested that the distance between the break area and some of the meeting rooms made the breaks feel rushed. Several respondents expressed a desire for more intuitive and Web-friendly program information online.

PROGRAMS



This year the conference presented three vision sessions. Vision session 1, "The Evolution of Reading and Writing in the Networked Era" with Bob Stein received a 3.80 rating. Vision session 2, "Hurry Up Please, It's Time: State of Emergency" with Karen Schneider received a 4.18 rating. The final vision session, "A New Approach to Library Service Discovery and Resource Delivery" with Daniel Chudnov rated a 3.95.

The eleven strategy sessions this year generated ratings from 3.63 to 4.49, with eight of the eleven sessions rating over 4.0. The highest rating went to the panel discussion "From Tech

Services to Leadership." The strategy sessions averaged an overall rating of 4.09.

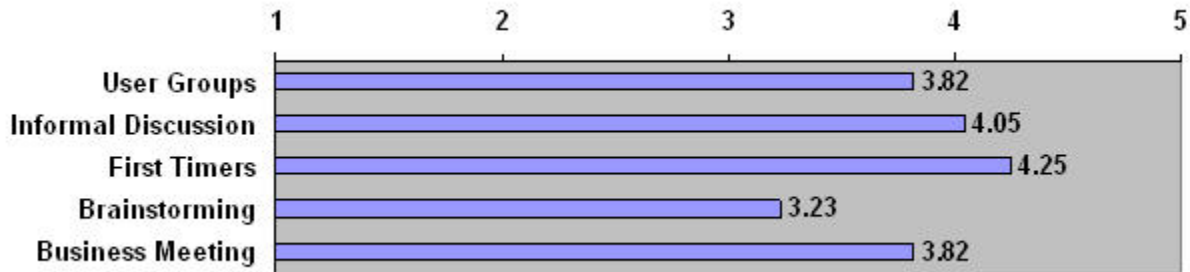
There were sixteen tactics sessions offered at this conference. Ratings ranged from 3.41 to 4.56 with nine sessions rated at 4.0 or higher. The highest-rated tactics session was "Verbal Bourbon: Speaking Secrets to Intoxicate your Audience" presented by Jeff Slagel. The tactics sessions averaged an overall rating of 4.01.

There were only thirty respondents for the poster sessions. The overall rating for the poster sessions was 4.31, up from last year's rating of 4.09. The majority of respondents (21) felt they had enough time to visit the posters, although

several respondents expressed a desire to have the posters up for a longer period and/or have another session with the presenters. Ratings for the individual poster sessions ranged from 3.76 to 4.28. The highest rating was for “The CONSER Standard Record” presented by Les Hawkins and Hien Nguyen.

There were four preconferences offered this year and all were very well received with ratings from 4.00 to 5.00. The comments were overwhelmingly positive for all the sessions. However, several of the preconference evaluations had a very low response rate (less than 25%), an issue that will be addressed with next year’s evaluation.

SPECIAL PROGRAMS

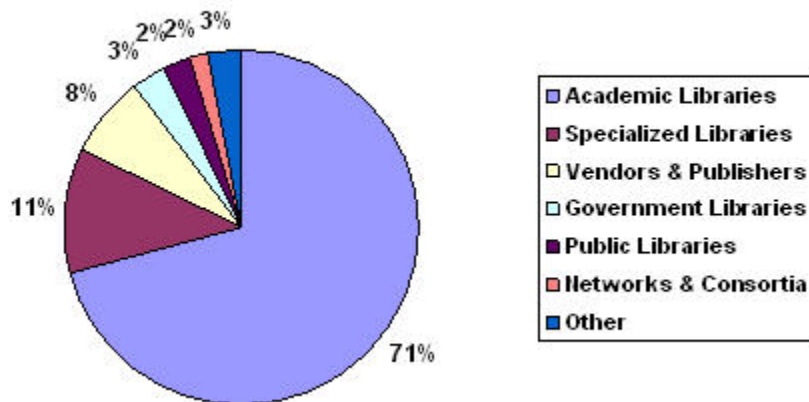


The Louisville conference continued a number of special programming events. The user group meetings and informal discussion groups rated 3.82 and 4.05 respectively. The overwhelming majority of respondents wanted both these types of sessions to continue. The first timers/mentoring reception received a 4.25 rating; comments suggest that first-timers and mentors alike appreciate this event. The brainstorming session received a rating of 3.23.

Many respondents felt that this type of session is generally useful for the organization, but this year’s topic (encouraging candidates to seek executive office) did not lend itself to open discussion or attract a diversity of viewpoints. The business meeting (3.82) received approximately the same rating as last year; attendees greatly appreciated the brevity of the meeting.

DEMOGRAPHICS

Responses by Organization Type

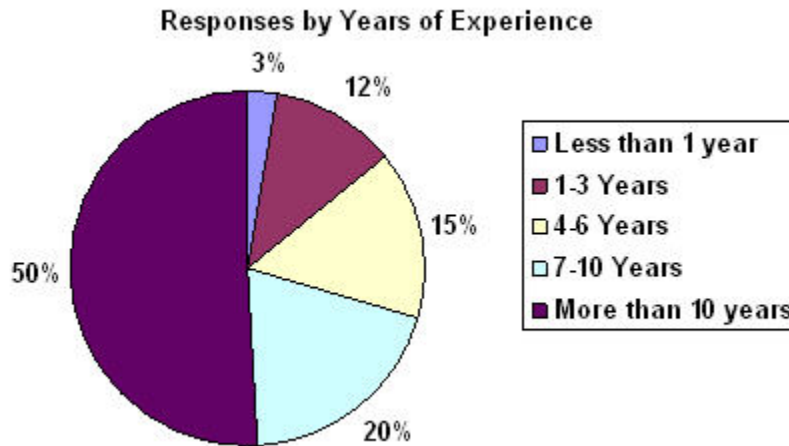


As in past years, academic librarians represented the largest group (71%) of respondents. This includes university (170), college (33) and community college (4) librarians. Attendees from specialized libraries, including medical (13), law (10) and corporate libraries (10) represented the next-largest group

(11%) of respondents. The percentage of responses from the vendor and publisher community including subscription vendors (11), publishers (9), automated systems vendors (3), and database providers (1) was down from 12% last year to 8% this year. The percentages of respondents from public libraries (7) and

consortia (5) were slightly higher than last year; the percentage of responses from government, national or state libraries remained similar to previous years. Six respondents chose the

category "Other," primarily attendees from museum libraries, research institutes and other categories not clearly defined in the list.



Most respondents were mid- to late-career librarians; 70% of respondents had seven or more years of serials-related experience, up from 65% last year. Most were also repeat NASIG attendees; 45.3% of respondents had attended 1-5 previous conferences, and 21% had attended 6-10 previous conferences, similar to last year's percentages. First-time attendees represented 15.5% of respondents, down from 21% in 2006.

2006 to 56 this year. Twenty-two respondents identified themselves as paraprofessionals, an increase from 16 in 2006. As usual, many respondents identified themselves with multiple categories and various "Other" designations. Many of those who selected "Other" emphasized middle-management responsibilities that were not among the existing choices.

The overwhelming majority of respondents identified themselves as serials (153), electronic resources (104), catalog (89), or acquisitions (81) librarians. The number of respondents identifying themselves as collection development librarians decreased from 69 in

The Evaluation & Assessment Committee would like to thank everyone who took the time to fill out the evaluation forms. Your comments and feedback are important as NASIG continues to strive to provide positive conference experiences. We welcome suggestions regarding the evaluation forms. Please address comments to Anne Mitchell, amitchell@uh.edu.

PROFILES

CHAR SIMSER, NASIG PRESIDENT

Susan Davis, Profiles Editor

Some things change, some things stay the same. What has changed? The person responsible for putting together this column is no longer Maggie Rioux. However, following tradition, the newly installed NASIG President, Char Simser, is the subject of this profile. I think she sets a record by being the first individual to be profiled twice.

I was coerced into taking over this column when Maggie subtly mentioned it during our convivial evening on a NASIG dine-around in Louisville. I must have made a serious dent in my margarita to have even considered accepting, but Maggie and Kathryn Wesley are a tough team to say "no" to. Luckily I had Char's earlier profile in v.19, no. 1 (March 2004) of the *NASIG*

Newsletter to fall back upon for material. Feel free to refer back to the earlier article (http://nasig.org/newsletters/newsletters.2004/04march/04march_profiles.html#CHAR) if you get lost or are confused by my questions or Char's answers.

As a former NASIG President, I couldn't resist asking Char some questions about the president's column she has to write for each issue. And as a former editor of the *Newsletter*, the tables are now turned on her! I could hear the "Argh!" as she responded to my question about how she felt now that she has to turn in copy on deadline. I then asked her if she had any pets that might be speaking in her column (referring to the past adventures of Twyla, Jimmie Dale, and my cat Peaches.) Char has a cat named Tinkerbelle who was adopted by her co-worker but could not adjust to her new home with two other cats. Tinker will be 10 later this year and is not a people cat and will not be appearing in Char's columns. However, you may be able to sneak a peak at Tinkerbelle on Char's Flickr site (<http://www.Flickr.com/photos/kstatelibrarian/>).

I also asked Char to compare the time she spent on the *NASIG Newsletter* as editor-in-chief versus NASIG President. Since she only has experience as the vice president she did confess that editor-in-chief took much more time. However, she reserves the right to reconsider her answer at the Phoenix conference. And after the discussion about running for office recently, she has a head start on a topic for her column.

Char clearly has a creative bent. She's into creative writing and Maggie told us in the March 2004 piece to ask how her novel was coming along. So I did ask. Just like many of us, she admits that her brain has very little in the way of creative juices at the end of the workday. She set the novel aside for awhile, but was able to complete a first draft by switching to a screenplay format. Now she has to find time (maybe when she needs to escape from the pressures of the presidency) to revise it again. She has an affinity for *Star Wars*, having become addicted to the GFFA (Galaxy Far, Far, Away). She began reading the *Star Wars* novels, which got her into writing (publishing stories under the name of Charlene Newcomb), which led her to AOL and chat rooms, where she discovered thousands of others who shared

her enthusiasm. She became part of a group of women who met for weekly chats about the novels and the original trilogy. Thirty women met in person for the first time in Las Vegas in 1997, and the group, which has grown to 80+ members, still meets annually.

I would be remiss in not mentioning that this year is the 30th anniversary of the original *Star Wars* movie. A huge gathering of over 30,000 people convened to celebrate the occasion in Los Angeles this past May. Char and others in her group were able to work the convention as stage hand, green room wrangler, crowd control manager, and more, including "Team Cake." According to Char's blog, volunteers worked tirelessly to prepare the many birthday cakes needed for the 6,000 fans who sang "Happy Birthday" to *Star Wars* on May 25, 2007. And think about how many days Char had to refocus her attention to the NASIG conference, which started for her with a board meeting on May 30. The woman is a trooper!

Char has created a *Star Wars* character, Alex (Alexandra) Winger, and in an exclusive interview with yours truly reveals that Alex has a cameo in *Vision of the Future* by novelist Timothy Zahn. *Star Wars* enthusiasts have detailed her life (based on Char's stories) fairly accurately on Wookieepedia (http://starwars.wikia.com/wiki/Alex_Winger).



Char and friend at the UFO Watchtower in Hooper, Colorado.

Words are not the only things Char plays with. In high school she played rhythm guitar and electronic organ for an all-girl rock band called

“liberation.” How many other catalogers have been members of rock bands? She also loves to take photos with her digital camera. She inherited the shutter bug from her dad, who was an avid still and 8- & 16-mm film photographer. Thanks to her dad, there is a family history going back to 1943. Char’s Flickr site has a large collection of family photos and she tells me that her two oldest children are carrying on the photo bug.

And speaking of children, I asked Char if she had become an empty nester yet. She will be one as of August 19 when her youngest son, Jeff, heads off to college in Texas where he has a cheer scholarship. He transferred there from K-State to improve his tumbling skills. Jenny is a junior at K-State majoring in marketing and a team coach at a local gymnastics center. Do I detect a theme here?? Char’s oldest son, Joel, is a video production editor in central Florida. He has aspirations to write, direct and edit his own films. Maybe mom will get him to turn her script (aka the novel) into a movie someday. Char is extremely proud of her brood, with good reason. I found a May 2006 photo of the “kids.”



Char’s kids, left to right, Joel, Jenny, Jeff. No wonder she’s proud!

In her spare time she likes to garden. Char believes her thumb is not green so she looks for low maintenance plants like daylilies and perennials to fill her huge backyard. She hopes to reduce the amount of grass she needs to mow to a mere ¼ of her yard. My brother-in-law who is also a cataloger has the same idea.

I have to admit that while I’ve known Char professionally for years, I didn’t know her very well. She is up to some amazing things and clearly has the creative talent and energy to be a super NASIG President. I encourage the membership to visit her blog and Flickr space frequently to keep up with this extraordinary woman.

OTHER NASIG NEWS

SITE SELECTION SURVEY RESULTS

Char Simser, Denise Novak and Joyce Tenney, 2006/07 Site Selection Committee

We want to thank everyone who took the site selection survey! We had over 330 individuals participate! What a great response! We heard privately from many NASIG members: some are tired of hearing about site selection; others find it very relevant.

Your comments included many questions and there were many common themes. We are addressing those as part of a Site Selection FAQ which is linked from the Members-Only section of NASIGWeb: <http://www.nasig.org/membersonly/index.htm> The complete survey results (without optional comments) are available there, also.

Here are highlights of the survey. So delete now, or read on!

The most important criteria when determining a site are location (48%), major airport nearby (23%), and then price of hotel rooms (21%).

What factors concerning location are important: 37% say proximity to a major airport; 36.5% say geographic location.

48% said you are willing to spend \$120-140 a night; 37% say \$140-160. A number of individuals say find something under \$120.

When we gave you actual dollars based on 2009 costs (2008 costs for Vancouver), Baltimore, Vancouver, and Kansas City received the highest number of votes.

Multiple hotels vs. 1 hotel: 66% said multiple hotels would not make the conference less attractive.

Renting a vehicle to travel to the conference is not an option for 68% if public transportation was not available. 46% of you indicated you would not attend the conference if you had to rent a vehicle.

23% indicate they prefer to drive (or bus/train) less than 45 minutes from airport to conference site; 27% said 1-2 hours max.

88% are willing to have breakfast, lunch and/or other meals on their own if registration could be significantly lowered.

45% said NASIG should only provide 1 reception or sit-down meal (and no other meals) even if conference registration is not significantly different, though quite a few individuals commented on the benefits of joint meals for networking and informal conversation.

134 individuals suggested over 300 potential conference sites. Removing the duplicates, we received approximately 130 unique locales, with Boston, Seattle, Nashville, and Atlanta being suggested by more than 10 individuals. Toronto, St. Louis, Philadelphia, and Minneapolis/St. Paul were each suggested by 7-9 individuals. Please note: hotel rooms in larger cities tend to be on the high end for a group our size so we previously ruled them out. However, since 40% of you indicate an interest in Vancouver, we need to definitely consider the location factor you rate as most important.

Other comments you made (also included on the FAQ):

People should note that housing costs and registration for professional conferences, such as NASIG may be tax deductible (must itemize, use schedule A, etc.), just as membership in NASIG may be tax deductible.

I prefer one hotel, because I enjoy the opportunity to have the unplanned conversation and like the serendipity factor. However, I

sometimes chose to stay in a less expensive hotel to save money.

The more disbursed we are, the more like ALA, and the less like NASIG, the conference will become.

Since I'm relatively new to NASIG, I like the social support of it being easy to find others.

On meals options:

1. Eating meals on my own starts to strongly limit the amount of time I spend with other conference attendees.

2. While I would be willing to have meals on my own I do really enjoy the ability to network at the meals that have been a part of the conference.

3. Meals on our own sort of defeats the purpose of the idea of a NASIG group dynamic.

4. Lunch is critical: there has to be an abundance of quick, affordable lunch spots within walking distance [if NASIG does not provide that meal].

5. I would prefer to be on my own!

6. It is really great to be able to eat at facility where you can meet and greet other NASIGers... I've met the most interesting people over informal meals, especially lunch and breakfast, but also would not mind finding my own place to pick up a quick meal if there were places close by.

7. Would I be willing to pay for my own meals in exchange for cheaper conference registration? Is that the question? Answer: I would prefer not to, as my employer will pay for registration but not meals.

8. Hanging out together offered opportunities for genuine communication between the various constituencies. The organization had a really identity based on the 'bonding' experiences we all shared at the conferences. In my opinion, moving in the direction of multiple hotels and a convention center just makes us another ALA.

9. Decoupling food from the conference is fine. We do this for sla, ala, acrl, charleston, etc.

10. As has been stated many, many times by conference attendees, the professional and

social networking is a very important part of the NASIG conference experience. Would be very hard to hang onto that if we're taking meals away from the meetings.

11. Not providing meals significantly limits the ability of students, early-career professionals, and people with limited institutional support to participate in the conference.

12. I do not feel NASIG needs to provide any meals.

13. Receptions [rather than sit-down meals] offer more mobility and less exclusion.

14. Meeting and greeting and continuing discussions over a meal are an integral part of this conference; NASIG provided meals are a good way to talk and mingle with other people. If I ate on my own, I would miss out on a significant part of networking at the conference.

15. Don't really care much about this issue.

16. Too much chicken [repeated several times].

One final question & answer to help summarize: Is the point of this survey to see how the membership wants to reduce the cost of the conference, or just to see what people like about the current setup and what they want to change?

Answer: certainly we were hoping for both types of feedback, but one of the bigger issues is to ensure every member understands how we go about choosing a site, how costs are derived (in the one hotel situation), and to determine if we should look beyond the one-hotel model. Our hope is that, in providing some additional background to your questions and comments, you understand the relationships in the overall scheme - how room rates, food & beverage, meeting rooms, AV, etc. - are all intertwined and impact our ability to put on a good conference. Please see Denise Novak's comments on site selection in the *Newsletter* blog: <http://nasignews.wordpress.com/2007/02/13/221-200703-executive-board-minutes/#comments>.

Bottom line: we will never meet everyone's needs. Please be aware we do listen and we are trying to hold costs down. Contact us at site-select@nasig.org.

ONLINE NASIG STORE

Did you miss the opportunity to get a conference tee shirt or other item of NASIG-abilia at this year's Louisville conference? Well, you're in luck! An online NASIG store is now open for business at <http://www.cafepress.com/nasig>.

Tee shirts and mugs with the Louisville logo and buttons with the NASIG logo are available. All proceeds go to support NASIG scholarships and awards.

2006 NASIG CONFERENCE *PROCEEDINGS* NOW AVAILABLE IN JOURNAL FORMAT!

Carol Ann Borchert and Gary Ives, Co-Editors

Mile-High Views: Surveying the Serials Vista has been published by Haworth as volume 52, no. 1-4 of the *Serials Librarian*. Edited by Carol Ann Borchert and Gary Ives, the *Proceedings* provide in-depth reporting of the various sessions at the conference which took place May 4-7, 2006, in Denver. The *Proceedings* include summaries of all sessions, plus transcripts of some of the vision sessions. For those of you who could not attend, or who regret

missing certain valuable programs, check out what you missed! The monograph version of the *Proceedings* has not yet been published, but is expected in the fall.

The co-editors wish to thank all speakers and recorders who made this published version of the 2006 NASIG Conference *Proceedings* possible. Your hard work is appreciated!

NASIG NOMINATIONS AND ELECTIONS PROCESS DETAILED

In the fall of 2006, the Executive Board formed a working group to write a document that would provide a clear explanation of NASIG's nominations and elections process to the membership. The working group consisted of the current chair of the Nominations & Elections

Committee, David Burke, and three former N&E members, Anne McKee, Christine Stamison, and Kathryn Wesley. The resulting document, revised in June 2007 to reflect changes to NASIG's bylaws affecting the election process, follows.

NASIG NOMINATIONS AND ELECTIONS PROCEDURE

Nominations and elections are governed by NASIG Bylaws, Article VII (<http://www.nasig.org/public/bylaws.html>) and are carried out by the Nominations & Elections Committee.

COMPOSITION OF THE COMMITTEE

The Nominations & Elections Committee is appointed by the incoming president in the spring of each year. The number of members on the committee may vary, but there should be an odd number. The term of service is one year. Members may be reappointed for one succeeding term. The chair may serve only one term as chair. At least one half of the committee each year should consist of new appointees. The past president serves as the committee's board liaison. Previous past presidents may serve as members of, or consultants to, the committee. Committee members are not eligible to be nominated for office during their terms of service.

COMMITTEE CHARGE

The Nominations & Elections Committee will solicit nominations of vice president/president elect, secretary, treasurer and board members, review proposed candidates' qualifications, prepare a slate of candidates, prepare the ballot, carry out the election, report the results to the NASIG membership and review any challenges to the election. The committee's deliberations will be strictly confidential. The committee will adopt all necessary and proper precautions to ensure the conduct of a trustworthy election.

THE NOMINATION PROCESS

A vice president/president-elect and three members-at-large are elected each year. Nominations for secretary and treasurer are solicited when appropriate. The term of office for the secretary is three years. The treasurer is elected during the second year of the sitting treasurer's term, and serves for an ex officio training period of one year followed by a three

year official term, for a total commitment of four years.

Nominations may be made by committee, by petition, or by write-in.

NOMINATION BY COMMITTEE

The committee solicits nominations from the membership in a number of ways. A printed call for nominations form is included in the conference packet distributed at the annual conference. Following the conference, the forms are turned over to the incoming chair of the Nominations & Elections Committee. An electronic form is made available on NASIGWeb, with submissions directed to the chair of the committee. Nominations may also be made by email, in writing, or by phone to any member of the committee. The chair of N&E issues one or more reminders on NASIG-L to encourage members to submit nominations. Members do not have to secure the permission of nominees before submitting their names, as the committee will contact them to determine if they wish to proceed with the process.

NOMINEE REQUIREMENTS

Nominees must be members in good standing for the year of the election in order to be considered by the committee, i.e., dues must be paid for the next year's membership before the committee may vet the nominee. The chair confirms membership status of nominees with the treasurer. No NASIG member may be denied a place on the ballot due to race, color, creed, sex, etc., in accordance with federal equal opportunity laws.

NOMINEE PROFILES

When the deadline for nominations has passed, the committee contacts all nominees to determine their interest in running for office and to secure their permission to consider them for the ballot. All nominees who agree to be

considered by the committee receive a nominee profile form. The form solicits information on their activities within NASIG, their relevant professional activities outside of NASIG, and a position statement regarding their potential contribution as a NASIG board member. The committee also sends the nominee a link to a NASIG web page with a job description of the position for which he or she has been nominated, and gives a deadline for submitting the forms to the committee.

NOMINEE REFERENCES

The nominee profile form also asks for the name of three references who can comment knowledgeably on the nominee's previous work in NASIG. For members who have served on committees, at least one of the three references should be the relevant committee chair(s). For current or past committee chairs or co-chairs, two of the three references should be the appointing president and relevant committee liaison(s). Current or past board members must include the presidents they served under as references.

RANKING NOMINEES

Each committee member reviews the nominee profile forms and rates nominees. The nominee profile forms assign specific weights for the committee members to rate nominees on NASIG activities, other professional activities, and the position statement. For vice president/president-elect, secretary, and treasurer, these are respectively 50% for NASIG activities, 25% for other professional activities, and 25% for the position statement. For members-at-large, the weights are distributed evenly at 33 1/3 % for each category. The chair and committee have leeway in deciding exactly how the review process is carried out. The chair compiles results and the committee decides who the strongest contenders are among the nominees.

CONTACTING REFERENCES

References are asked a list of standard questions soliciting information on the nominee's reliability, enthusiasm, and creativity. If current board members are running for reelection or for other office, the chair contacts those references. References remain confidential between the contacting member and the chair, though the chair may give a general summary of the tenor of the reference to the committee in the course of their deliberations. If the chair

contacts references, he or she will share the results of those contacts with one other committee member in order to ensure that the gist of those references is fairly conveyed.

All information regarding nominees, committee deliberations, and especially information obtained from references, is to be kept absolutely confidential within the committee.

PREPARING AND ANNOUNCING THE SLATE

Based on the nominees' rankings and references, the committee prepares a slate of candidates. They endeavor to choose at least two nominees for each open position. In the event of a shortage of nominees who are willing to run for an office, the committee may solicit potential candidates. The chair informs the president of the final ballot as soon as it is completed. This notification is for courtesy purposes only. **The board does not approve the slate. The board accepts the slate of candidates as named by the committee.** Before announcing the slate of candidates to the membership, nominees are notified regarding whether they made it onto the ballot. The chair then announces the slate of candidates to the membership on NASIG-L.

NOMINATION BY PETITION

After announcing the slate of candidates nominated by the committee, the chair issues a call for nominations by petition on NASIG-L. Petition nominees must agree in writing to run for the office nominated and must be members in good standing as described above. The chair must receive petitions in support of the nominee from at least ten members in good standing. Petitions may be handled by paper or by email. Petitioners may sign or add their email to a single document, or they may submit individual messages to the chair as long as they clearly state their names, the name of the petition candidate, and the specific office for which the candidate is being nominated. Successful petition candidates must fill out a nominee profile form, and will be included on the official ballot. The chair must receive nominations, supporting petitions, and nominee profile forms within fifteen days of the call for nominations by petition. Petition candidates will be designated as such on the ballot.

NOMINATION BY WRITE-IN

The ballot will include spaces under each office for write-in candidates.

BALLOTING

Ballots are distributed at least 60 days prior to the annual conference. Names appear in alphabetical order on the ballot. Nominee profiles with position statements for each candidate are made available to the membership. Completed ballots will be accepted for 30 days after distribution. Ballots returned after 30 days will not be counted.

COUNTING THE BALLOTS AND REPORTING THE RESULTS

The chair counts the ballots. The ballot count is confirmed by another committee member or by a disinterested third party. In case of a tie for any position, the committee decides the winner by blind lot.

When the count is complete and confirmed, the chair notifies the president, including vote totals. The candidates are notified by phone. The president communicates the election results, including vote totals, to the Executive Board, and the chair does the same with the committee. All candidates must be notified by

phone before results are communicated to the membership. Phone calls should be followed up by notification in writing. The results of the election are then announced on NASIG-L. They are also posted on NASIGWeb, and announced in the next issue of the *NASIG Newsletter*.

RETENTION OF BALLOTS AND CHALLENGES TO THE ELECTION

All ballots are retained for 120 days following the close of the election in the event that a challenge is made. Also, intra-committee correspondence throughout the year should be sent through the committee email list so that it can be archived. Challenges to the election must be made in writing to the president within 10 days of the first publication of the results. The board will evaluate the merits of the challenge. If it is determined that the challenge has merit, the board will appoint two non-NASIG members to do a recount.

N&E Document Working Group
David Burke
Anne McKee
Christine Stamison
Kathryn Wesley, chair
Fall 2006; revised June 2007

COMMITTEE ANNUAL REPORTS

CONFERENCE PLANNING COMMITTEE

Tyler Goldberg and Angel Clemons, Co-Chairs

WRAP UP REPORT, 22nd ANNUAL CONFERENCE (2007)

Members: Angel Clemons, co-chair (University of Louisville), Deberah England (Wright State University), Tyler Goldberg, co-chair (University of Louisville), Steve Kelley (Wake Forest University), Jeanne Langendorfer (Bowling Green State University), Kat McGrath (University of British Columbia), Neal Nixon (University of Louisville), Peter Whiting (University of Southern Indiana), Danielle Williams (University of Evansville); Consultants: Connie Foster (Western Kentucky University), Joyce Tenney (University of Maryland, Baltimore County); Board Liaison: Alison Roth.

AV

One committee member handled the AV responsibilities. He contacted the hotel's in-house vendor and three other companies for bids for AV services. The bids ranged from just

over \$19,000 to nearly \$27,000. (One company was very upset that they had submitted bids for the NASIG conference three years in a row and never been selected. They argued that it was unethical to simply use their bid to try to get the in-house company to lower their price). The in-house vendor submitted the lowest bid, and provided what we needed for each room, including laptops, microphones, LCDs, screens, etc. They were very easy to work with, and very prompt at fixing small problems or making last minute additions. A different in-house company at the hotel handled Internet service. Due to the high expense of Internet connectivity, very few sessions were provided with Internet service. On the conference days the CPC member was available and checked on the set up in each room. We also rented a combination copier/printer from a local company in Louisville, which the CPC member in charge of AV arranged. The company was very slow to return

a service call on the first day of the conference, which cost us a whole day's use of the equipment we had rented from them. In addition, the CPC member arranged the rental of walkie-talkies for the CPC to use.

COST: \$23,615.00

RECOMMENDATIONS:

1. Make sure the CPC has access to a printer and copier. Although we didn't use them much, they were invaluable when we needed them.
2. With the proliferation of cell phones, consider not ordering walkie-talkies for communication between committee members during the conference. Even though we had walkie-talkies, we never used them. We only used cell phones.

CONFERENCE PACKETS

Conference totebags and lanyards were given to all attendees (see SOUVENIRS). Conference folders and ball point pens were donated by Hannelore Rader, Dean, University of Louisville Libraries. Folders contained all photocopied material that is listed in the NASIG Conference Planning Manual Appendix D. Photocopies were made at Kinko's using a Kinko's NASIG account. Lanyards and name badges (both purchased from the Louisville Convention Bureau), Louisville attractions brochures, and coupons were also stuffed into the conference totebags. Souvenir Louisville pins, also from the Convention Bureau, were included as well. Badges, copies of the itinerary, all special event tickets, and conference badge ribbons were put in envelopes and handed out separately from the packets. Conference packets were stuffed by local volunteers the Friday before the conference, and the Dean of the University of Louisville Libraries provided pizza for all the volunteers.

COST: \$2543.62 (printed materials); NASIG ribbons: \$96.91; preconference binders: \$247.00

FOOD

All food decisions had to be approved by the board and the food for some events (e.g., mentoring and breakfasts) were part of the contract with the hotel. Since the hotel costs were very high we tried to be very minimal with the break food. We were lucky that the hotel worked with us and the breakfasts were by consumption only. Attendees were given a meal

ticket for breakfast (Friday, Saturday, and Sunday) and went to the regular hotel restaurant. NASIG was only charged for tickets collected. The hotel also paid for the cost of the mentoring reception and they also provided, at no cost, lots of snacks for the registration desk workers. The hotel meal costs for 4 preconference breaks, 3 breakfasts, 2 lunches, 5 conference breaks, 1 late night social snack, and the food at the reception at the Frazier Museum (see OFF-SITE EVENTS) were budgeted at \$89,914.00. NASIG was exempt from state tax. We made every effort to accommodate food needs, including vegetarian choices, gluten free and low-fat. Food was plentiful and everyone who had a special food request was issued a food ticket that they turned in to claim their special meal. The hotel provided water on the tables at the back of every meeting room refreshed after each meeting and bottled water free in other areas of the hotel. Therefore, NASIG did not provide bottled water.

COST: \$64,603.08 (we did not see the final hotel bill for food events so this number is based on our estimated counts of attendees. It does not include the reception at the Frazier Museum.)

RECOMMENDATIONS:

1. Although the board requested a sit-down meal for the business lunch it was very difficult to find one menu choice that would please everyone in attendance. A buffet offers many more options and would be recommended, but it can be very hard to do in a timely manner with so many attendees.
2. We let attendees indicate any kind of food preference they wished on the registration form, and some were very challenging for the hotel. Make this a "drop down" on the registration form; with choices your caterers can accommodate (e.g. vegan, gluten-free, etc.)
3. The CPC recommended that box lunches no longer be purchased for Sunday's lunch due to cost and the fact that there are now food/beverage restrictions on airlines. This was approved by the board and the lack of box lunches on Sunday didn't cause any problems.

FUN RUN

We had 20 to 30 people participate in an early morning run/walk along the Ohio River near the Galt House. Three committee members, Alison

Roth, Kat McGrath and Peter Whiting, helped the participants navigate the course. Water bottles were provided to the runners/walkers. Prizes, a knapsack and two magnets, were given to the three winners.

COST: \$41.82

FUND RAISERS

In addition to selling raffle tickets for a free registration, the CPC offered a "bourbon tasting" at the hotel. The event was sold out at 75 tickets.

PROFIT: \$750.00 (bourbon tasting event); \$374.00 (raffle tickets); souvenirs (\$117.00)

HOTEL

Prior to the conference the co-chairs worked together with our primary hotel contact. She met with us, as well as the Food Subcommittee (this committee took care of all food separately). One of CPC co-chairs took care of room reservations. The hotel contact was particularly helpful when there were reservation issues due to the room blocks filling earlier than anticipated and the hotel's new reservation system. The co-chairs didn't get a room because we thought we could go back and forth every night.

COST: \$0.

RECOMMENDATIONS:

1. The co-chairs should get a room, as it is very hard to go back and forth when the registration desk opens early and events run into the evening. In the end the hotel gave us a room for the last two nights.
2. Stay on top of the room reservations for the speakers. The list should be given to the CPC as early as possible. This year the room blocks had filled on some of the nights by the time the CPC co-chairs received the list.

LOCAL INFORMATION

We set up two tables opposite the registration desk for local information. Hosted dinners or "Dine-Arounds" proved to be the most popular reason for visitors at the Local Information Table. Attendees found printed menus attached to the dinner sign-up sheets most helpful when deciding on restaurants. Brochures of local attractions were on display, along with poster sized signs describing the nearby Riverfront Park and Fourth Street Live. Other materials available were a local church list, conference

reception flyer, Internet access location sign and Fun Run flyers. The Local Information Table was staffed at heavy times, such as during breaks.

OFF-SITE EVENTS

The opening event was at the Frazier International History Museum, within walking distance of the hotel. The contract for the museum was signed by the board, so the CPC didn't choose this venue, but we were very happy with the choice. The food was taken care of by the Food Subcommittee. The museum has 3 floors of exhibits and offers historical reenactments. We had an exhibition by Elizabethan sword masters, as well as an historical interpretation about Anne Boleyn. Entertainment was by the band "Hog Operation." After initially intending to have the band in the rooftop garden, we moved it to another part of the museum to save on the cost of building a stage. We did have a shuttle bus (see TRANSPORTATION).

On Saturday night, attendees could register for a dinner cruise on the "Spirit of Jefferson." (Normally the board likes to offer a baseball game to attendees on Saturday night, but the Louisville Bats were not in town that weekend.) The ship was docked within easy walking distance of the hotel.

COST: \$24,032.50 (event at the Frazier International History Museum)

COST: \$0. (dinner cruise). (We made an estimated profit from this event of \$1200.00)

ONLINE REGISTRATION

This year online registration had a bumpy road with the death of the NASIG treasurer and a late start with the systems technician. Despite that late start we fortunately managed to have a good turnout at the conference.

RECOMMENDATIONS:

1. The registration form should be a one page form. Examples of registration forms to follow include the Charleston conference registration form.
2. Tours and trips need to be on another separate registration form since a majority of institutions do not allow payment for extras.
3. A preview pdf version of the registration form should be available so that registrants have an idea of what the form looks like.

4. When a registrant signs up as a member the Database & Directory committee will have to be informed so that the registrant can fill out a membership form.

OPENING SESSION

The conference was opened by Denise Novak, President, NASIG. Hannelore Rader, Dean, University of Louisville Libraries, also welcomed the group. Denise read a plaque from the Mayor's Office, welcoming NASIG to Louisville. The speaker was Dr. Tom Owen, a local historian, who did a great job providing an entertaining and concise overview of the city's history.

COST: \$250.00 (honorarium)

POSTER SESSIONS

Thirteen poster sessions were set up in the very spacious lobby area outside the plenary session hall. Hosting the breaks nearby brought lots of traffic through regularly and allowed visitors to circulate without crowding. The rental company was very accommodating in providing delivery and set-up on Thursday afternoon which ensured that presentations were in place with minimum fuss on Friday. Storage and security was not a problem. Take-down Friday evening was smooth.

COST: \$625.00 for poster board, delivery, and set up

RECOMMENDATIONS:

1. A single day for hosting the poster sessions is sufficient. A large, high visibility location is critical. Overtime/weekend labor charges can be a factor when sourcing suppliers. It is helpful to preview the boards as well as the space. Dark (black) boards provide an attractive backdrop to presentations. Presenters should be encouraged to provide a link to their poster content through the NASIG conference website (reduce paper, encourage follow-up).

PRECONFERENCES

Preconference registration ranged from 12 to 41 attendees for each of the four sessions. CPC purchased binders for the preconference manuals. CPC also downloaded the course information supplied by the PPC, had it photocopied at Kinko's, and assembled the manuals. We had two on-site registrations which required us to return to Kinko's for

additional photocopying. Small snacks were provided for the attendees during each break but lunch was not included in the cost of the preconference. One instructor requested an Internet connection that had not been previously ordered. The registrations were as follows for each session:

Metadata Standards and Applications: 41
Publishing 101 -- The Basics of Academic Publishing: 19
SCCTP Integrating Resources: 14
SCCTP Electronic Serials Cataloging Workshop: 12

COST: Costs of binders and photocopying course materials can be found under CONFERENCE PACKETS.

PUBLICITY

The logo for the meeting was designed by Michael Garzel, a graphic designer whose services NASIG had used for past conference logos. The board elected to not distribute postcards this year. All communications were conducted via the NASIG-L listserv and the listservs of pertinent local groups. Postings to NASIG-L were sent regularly to promote the meeting, advertise registration, and to inform the group of meeting details and items of local interest. Invitations to attend the meeting were sent to local groups in March and April.

COST: \$500.00 (logo)

SOUVENIRS

The board determined that we would not purchase souvenirs for this year's conference. This was due in part to the limited quantity of affordable quality souvenirs that could meet our allocated budget and the fact that NASIG has lost money on souvenirs at the four previous conferences. However, we did sell souvenirs left over from the 2006 conference, including tee shirts (sold for \$5.00), cross stitch patterns (sold for \$1.00 each) and water bottles (sold for \$3.00 each). T-shirts and water bottles sold out, and the cross stitch patterns that were left were sent to Phoenix for next year's conference.

Totebags and lanyards were not considered souvenirs, per se, but were given out free of charge to each registrant upon checking in at the registration desk. These items were ordered by the Souvenir Subcommittee. Lanyards and name badges were printed and purchased from

the Greater Louisville Convention and Visitors Bureau.

COST: \$2323.68 (totebags); \$750.00 (lanyards)

RECOMMENDATIONS:

1. If you want a good bag (and we did), you need to pay for it. We looked at lots of cheap bags, and finally decided that these would not work. Bags cost \$3.31 each (not including set up), and attendees liked them.

TOURS (PRE- AND POST-CONFERENCE)

We arranged tours using a local company. We worked with the company's owner to pick sites we thought visitors would want to see, e.g. Churchill Downs. We arranged two four-hour tours (Thursday and Sunday), as well as one shorter tour to Louisville Stoneware, and one downtown walking tour. Unlike former years, the post-conference tour sold out, and the Thursday tours had respectable numbers. The tour company asked us to collect the fees as part of registration, which we did.

COST: \$0. (We advertised through the conference website and listservs.)

RECOMMENDATIONS:

1. As noted under ONLINE REGISTRATION, tours and other special events should be on a separate registration form.

TRANSPORTATION

Details regarding transportation to and from Louisville via air, car, train, and bus were posted on the meeting website. Attendees were responsible for their own transportation between the hotel and airport. The hotel had a fee-based shuttle service. Two events were held outside the hotel, but within walking distance. For the opening reception, transportation aimed at those who had limited mobility was made available by renting a 24-seat shuttle bus with a wheelchair lift from the shuttle bus vendor used by the conference hotel. For the dinner cruise volunteers were stationed to direct people to the boat dock and to escort anyone in a wheelchair if necessary. Those who indicated special transportation needs on their registration form were emailed directly and informed of the bus and escort service to the two outside events.

COST: \$382.50 for shuttle bus rental.

RECOMMENDATIONS:

1. The CPC was asked to contact airlines about setting up a "conference airline." This proved to be impossible. Louisville isn't a hub for any airline, except UPS, and with so many ways for attendees to get cheap airline reservations, this seems to be a useless endeavor now. The CPC should no longer try to do this.

VOLUNTEERS

We received an excellent response to our calls for volunteers. A meeting was held April 17, 2007 to discuss the conference and potential volunteer projects. Most of our volunteers were University of Louisville employees, although some other NASIG members and local people were included. Eleven University of Louisville employees helped with the packet stuffing on May 25.

We had a good response for staffing the registration/local information desk. Thirty-eight people, including board members, CPC members, and volunteers from local libraries helped.

There were eight dine-arounds on Friday night and four on Saturday night. Two were canceled because of distance and time. All the others were well attended.

WEBSITE

While the website developed over time, all pertinent information was available online by March 1, 2007. Online registration for the conference began March 21st and closed May 17th.

The website provided two versions of the conference program, a complete program and a quick guide, as well as electronic handouts for program sessions (provided after the conference using Moodle software). The conference webmaster used WordPress to administer the conference blog. NASIG personnel administered the forum section and the online evaluation forms were created using SurveyMonkey software.

Cost: \$0. (But other NASIG committees may have incurred costs for SurveyMonkey, WordPress, and Moodle.)

ELECTRONIC COMMUNICATIONS COMMITTEE

Anna Creech, Chair and Dalene Hawthorne, Co-Chair

Committee members: Abigail Bordeaux, Jennifer Duncan, Eric Elmore, Tony Goodwyn, Tonia Graves, Jennifer Lang, Jonathan David Makepeace, Jia Mi, and Wendy Robertson;
Board Liaison: Katy Ginanni

CONTINUING/NEW ACTIVITIES

Website:

- Jennifer L. continues to maintain the online photo album. Jennifer D. and Abigail successfully moved the Jobs section to a WordPress blog. Anna has updated the web pages regularly and has been involved in supporting several projects from other committees.
- Anna coordinated the purchase of the nasig.net domain name and hosting services via SiteGround for setting up a Moodle installation to be used at the annual conference.
- A one year subscription to SurveyMonkey was also purchased for the purposes of creating membership surveys and post-conference feedback forms.
- Anna and Abigail both worked with the task force collecting and evaluating RFP responses from ISPs and other vendors in response to the board's decision to look for companies who can support the growing needs of the organization.

Lists:

- Dalene, Wendy, Jennifer L., Tonia, Jia, and Jonathan have all been rotating the monitoring of the listservs. The list managers also handle any inquiries from NASIG members, monitor the spam inbox, and resolve bounces from committee lists.
- Dalene adds new NASIG members, creates new committee lists, updates committee list membership, and updates forwarding email addresses.
- D&D provided lists of active and inactive members after the membership renewal. Dalene used these lists to update NASIG-L. Dalene is still working to remove mostly out-of-date e-mail addresses from NASIG-L.

COMPLETED ACTIVITIES

Many completed activities are now ongoing and included in the above section.

ACTIVITIES THAT SUPPORT THE NASIG STRATEGIC PLAN

Stimulate diverse communication channels:

- The Moodle installation will provide options for continuing discussions from conference sessions, and will more easily facilitate the distribution of handouts and other presentation material.
- SurveyMonkey will make it easier to create feedback channels for the membership.

Define options for using technology and employing support necessary to avoid volunteer burnout:

- A new host that meets the needs outlined in the RFP will allow NASIG to transition into Web/Library 2.0 models of communication and information organization, as well as provide better tools for managing older technologies such as the listserv.

STATISTICAL INFORMATION

Website (May 2006 – April 2007):

- Average hits on the site per month: 222,473 / home page: 4,770
 - Average page views per month: 99,546
 - Average visitor sessions per month: 43,480
 - Average one-time visitors per month: 5,940
 - Average returning visitors per month: 3,010
- Full details - <http://nasig.org/statistics/>

Lists:

- 41 committee lists: 29 active
- 878 current subscribers to NASIG-L
- 37 active forwarding addresses

ACTION(S) REQUIRED BY BOARD

None at this time.

QUESTIONS FOR BOARD

None at this time.

RECOMMENDATIONS TO BOARD

1. It is possible to have the committee listservs set up so that e-mail attachments can be used by the committees. There is no additional charge for this, but it will require bee.net to move our listservs to another server. Dalene recommends that we ask bee.net to make this change for the convenience of the committee members.

2. Dalene recommends that we change the policy that states that only committee members can be added to the committee listservs and that

other NASIG members that are assisting the committees may be added to the committee listservs with the president's approval.

EVALUATION & ASSESSMENT COMMITTEE

Anne Mitchell, Chair

Committee members (2007): Anne Mitchell, Chair (University of Houston), Lori Terrill, Vice-chair (University of Wyoming), Joe Badics (Eastern Michigan University), Carole Bell (Temple University), Jana Brubaker (Northern Illinois University), Sarah Corvene (Harvard Business School), Susan Davis (State University of New York, Buffalo), Lee Krieger (Library System of Lancaster County), Martha Spring (Loyola University)

Board Liaison: Adam Chesler

In February the committee was informed that 2007 conference evaluations should again be available both in print and online so conference attendees would have a choice of evaluation format. To encourage use of the online evaluation form, the Executive Board authorized a drawing for a free 2008 conference registration; anyone who submits an online evaluation is eligible for the drawing.

In April the committee created the print evaluation forms for the conference, preconferences, and poster sessions. These

forms were sent to the Conference Planning Committee for distribution. To further encourage attendees to use the online evaluations, individual conference packets will not include the evaluation itself, but will contain an insert with the URL for the online evaluations. A limited number of print evaluations will still be available on-site.

In May the committee developed the online evaluation forms. In lieu of the custom-programmed evaluation site used in 2006, the committee is using the hosted survey product SurveyMonkey to build the online evaluations. This tool requires no programming expertise and should greatly simplify survey creation from year to year.

The committee is working with the conference Web designer to provide a link from the conference site to the evaluations a week or so ahead of the conference. An announcement will be made on NASIG-L when the evaluations are available.

CONFERENCE REGISTRATION WINNERS

Two NASIG members have recently been the recipients of free conference registrations. Ronadin Lee Carey, periodicals librarian at the University of Wisconsin, Eau Claire, won the drawing held at the Louisville conference to support NASIG scholarships and awards. Lisa Blackwell was announced on August 18 as the

winner of the conference evaluation drawing, which was held to encourage conference attendees to submit online evaluations. Lisa is the serials/research librarian at Children's Hospital Library in Columbus, Ohio. Congratulations to both Ronadin and Lisa!

2007/2008 EXECUTIVE BOARD

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Jill Emery, Vice President/President-Elect
Denise Novak, Past President
Joyce Tenney, Secretary
Peter Whiting, Treasurer

MEMBERS-AT-LARGE
Rick Anderson
Anna Creech
Kim Maxwell
Alison Roth
Bob Schatz
Jeff Slagell

2007/08 COMMITTEE LIAISONS

<i>BOARD MEMBER</i>	<i>LIAISON TO</i>	<i>COMMITTEE CHAIR(S)</i>
Char Simser	Financial Development <i>Newsletter</i>	TBA Kathryn Wesley, Editor-in-Chief
Jill Emery	Program Planning	Sarah Wessel, Chair Erika Ripley, Co-Chair
Denise Novak	Nominations & Elections Publications/PR	Gail Julian, Chair Kathy Brannon, Vice-Chair Marit Taylor, Chair Glenn Wiley, Co-Chair
Joyce Tenney	Archivist	Sheryl Williams, Archivist
Rick Anderson	Conference Planning	Cory Tucker, Co-Chair Sandra Wiles, Co-Chair
Anna Creech	Electronic Communications Translators Resource Team	Dalene Hawthorne, Co-Chair Abigail Bordeaux, Co-Chair Frieda Rosenberg, Coordinator
Kim Maxwell	Continuing Education Library School Outreach TF	Betty Landesman, Chair Valerie Bross, Co-Chair Sarah Sutton, Chair
Alison Roth	Awards & Recognition Evaluation & Assessment	Sarah Sutton, Chair Clint Chamberlain, Co-Chair Anne Mitchell, Chair Lori Terril, Co-Chair
Bob Schatz	Bylaws <i>Proceedings</i>	Konstantin Gurevich, Chair David Bynog, Co-Chair Carol Ann Borchert, Editor Buddy Pennington, Editor
Jeff Slagell	Database & <i>Directory</i> Membership Development Mentoring Group	Lisa Blackwell, Chair Marty Gordon, Co-Chair Marla Chesler, Co-Chair Tina Feick, Co-Chair Eleanor Cook, Chair Katy Ginanni, Co-Chair

2007/2008 COMMITTEE ROSTERS

ARCHIVES
Sheryl Williams

AWARDS & RECOGNITIONS
Sarah Sutton, Chair
Clint Chamberlain, Co-chair
Patrick Carr, Chair-in-training

Chris Brady
Evelyn Brass
Alan Diehlman
Carol Ficken
Christine Freeman
Marcella Leshner
Elizabeth McDonald

Sarah Morris

BYLAWS

Konstantin Gurevich, Chair
David Bynog, Co-chair
Janet Arcand
David Burke
June Garner
Elizabeth Parang
Kate Seago
Adolfo Tarango

CONFERENCE PLANNING

Cory Tucker, Co-chair
Sandra Wiles, Co-chair
Michael Arthur
Mary Bailey
Karen Davidson
Holly Eggleston
Lisa Gomes
Smita Joshipura
Reeta Sinha
Fran Springer
Janene Wandersee
Xiaoyin Zhang

CONTINUING EDUCATION

Betty Landesman, Chair
Valerie Bross, Co-chair
Michael Bradford
Cris Ferguson
Jessica Gibson
Jill Grogg
Lei Jin
Steve Oberg
Jayne Sappington
Virginia Taffurelli
Sarah Tusa

DATABASE & DIRECTORY

Lisa Blackwell, Chair
Marty Gordon, Co-chair
Alice Bright
Heather Cannon
Ann Ercelawn
Cecilia Genereux
Julie Kane
Tzu Jing Kao
Greg Matthews
Bob Persing
Suzanne Thomas

ELECTRONIC COMMUNICATIONS

Abigail Bordeaux, Co-chair
Dalene Hawthorne, Co-chair
Beth Ashmore

Nancy Beals
Tonia Graves
Jonathan Makepeace
Jia Mi
Smita Parkhe
Wendy Robertson
June Yang

EVALUATION & ASSESSMENT

Anne Mitchell, Chair
Lori Terril, Co-chair
Joe Badics
Carole Bell
Jana Brubaker
Sarah Corvene
Susan Davis
Ann Doyle Fath
Lee Krieger
Janice Lindquist
Martha Spring
Christina Torbert

LIBRARY SCHOOL OUTREACH COMMITTEE

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Steve Oberg (CEC)
Sarah Sutton (A&R)
Denise Novak (Publicist)

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Tina Feick, Co-chair
Bob Boissy
Pam Cipkowski
Rachel Frick
Linda Smith Griffin
Anne Meringolo
Michele C. Monson
Alice Rhoades
Zac Rolnik
Vicki Stanton

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Katy Ginanni, Co-chair

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Kurt Blythe
Susan Davis
Lillian DeBlois
Sharon Heminger
Kathy Kobyljanec
Naomi Young

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Kathy Brannon, Vice chair
Christie Degener
Sarah Gardner
Tim Hagan
Susan Markley
Jenni Wilson

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Buddy Pennington

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Sandy Hurd
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Glenn Wiley, Co-chair
Susan Banoun
Sandy Folsom
Kathryn Johns-Masten
Linda Pitts
Gracemary Smulewitz

SITE SELECTION

Jill Emery
Char Simser
Joyce Tenney

TRANSLATORS RESOURCE TEAM

Frieda Rosenberg, Coordinator
Derek Hiatt
Shana McDanold
Birdie MacLennan

OTHER SERIALS NEWS

NORTH CAROLINA SERIALS CONFERENCE

Reported by Rebecca Kemp

The 16th annual North Carolina Serials Conference took place in Chapel Hill, North Carolina, from March 29-30, 2007. The conference was sponsored by North Carolina Central University's School of Library and Information Sciences with the aid of other partners. This year's theme was "Serials at Warp Speed: Navigating Transitions." Although most attendees hailed from North Carolina, several other states were represented. Academic, public, and special librarians as well as vendors attended and gave presentations.

This year's conference was augmented by a half-day preconference, "Implementing an Institutional Repository," presented by Carol Hixson, University Librarian, University of Regina. Hixson talked about planning for and implementing an institutional repository. Hixson indicated that it would be wise for libraries to create a business plan, including figuring out how long to support the IR. Although Hixson

emphasized that IRs will *not* solve the scholarly communications crisis, she noted that IRs are an excellent way to keep university-related intellectual property together as a promotional tool for the university. She also discussed the considerable amount of marketing that accompanies an IR. It is necessary to have a good deal of technical expertise on staff to be able to troubleshoot problems, ensure compatibility with standards, install patches and updates, etc. Hixson outlined various methods of evaluating the success of the repository.

The conference proper began with the opening keynote, "The Changing Faces of Catalogs: Accelerating Access, Saving Time" presented by Karen Calhoun, Assistant University Librarian for Technical Services at Cornell University. Calhoun presented the "Net Generation" library users' preferences: most students surf the web to find information; the library website and catalog rank very low in the list of students'

information sources. Calhoun emphasized that the library can not assume that users will simply come to us; we have to put the library “where the user is.” Some new strategies for libraries are digitizing books, using WorldCat.org, partnering with other libraries to create larger (but fewer) catalogs, and innovating within the catalog. New catalog software such as AquaBrowser, WOPac, and Evergreen are more user-friendly than older catalog models. New products on the horizon are ExLibris’s Primo, Innovative’s Encore, and an open source Extensible catalog.

The keynote was followed by a panel on Institutional Repositories called “Transporters to the Next Generation or Just Another Holodeck?” Panelists were Carol Hixson (University of Regina); Cat McDowell (UNC-Greensboro), Allan Scherlen (Appalachian State University), and Joseph Thomas (East Carolina University). Hixson argued that IRs will not change established modes of scholarly communication. McDowell concurred with this view, indicating that most of the IRs with a good deal of content in them are high research institutions, according to the Carnegie classification. She held the opinion that IRs are not the vehicles for change that initial proponents thought they would be. The other panelists brought forward other reasons for having IRs, though: Scherlen posited that IRs have overwhelming benefits for the participants, and that libraries ought to collect electronic faculty output as we do print. Thomas indicated that IRs require a great deal of administrative, library, and faculty buy-in, but that they are very useful for tenure review and storing university output of any kind, whether videos, art exhibits, performances, etc.

The next session was a general session entitled “Empowering the Library Search Experience.” This was a two-part presentation by Holly Johnson (Howard County Library, Columbia, Maryland) and Kristin Antelman (North Carolina State University Libraries). Johnson presented her public library’s effort to make the catalog more user-friendly. She demonstrated AquaBrowser catalog searches and features such as the “discover cloud,” which is a cloud of related terms to the search terms. She also demonstrated the faceted search for refining search results and a library databases search that is linked from AquaBrowser. Howard County Library has added selected RSS feeds, and it is also considering adding a “Buy it” link to

bookstore websites when a patron would like to buy a copy of the desired item. Antelman discussed NCSU’s implementation of the Endeca-powered catalog interface and the issues that are still outstanding a year after implementation. Antelman raised a few concerns: serials still present challenges for relevancy ranking, and subject access is still a problem because of the disconnect between natural language searching for subjects and the LCSH terms for subjects. In the future, NCSU will implement RSS feeds and a search box that can be used in patrons’ browsers. Also, the Triangle Research Libraries Network (North Carolina State University, UNC Chapel Hill, Duke University, North Carolina Central University) will be instituting a consortium-wide Endeca-powered catalog.

The concurrent sessions followed the general session. A session entitled “Community College Libraries – How Far Do We Need To Go” was led by Marilyn Carney (Wake Technical Community College). Carney discussed a survey of area community colleges that had three objectives: to find out how community colleges are enhancing journal collections despite small budgets, how they are responding to increased e-journal usage, and how their libraries have been affected by the switch to more online journals.

Another concurrent session, entitled “The Right of Passage: Going from Print to Electronic – Is it the Right Move” was led by Barb Dietsch (Environmental Protection Agency Library) and Leslie Covington (EBSCO Information Services). Dietsch and Covington discussed the issues involved in the process of switching a library’s subscriptions from mostly print to mostly online. Covington was able to provide a vendor’s perspective of this process for a full view of the transition.

Yvette Diven (CSA) and Beth Bernhardt (UNC Greensboro) presented on “The TRANSFER Initiative: Helping Develop Guidelines for Journal Transitions Between Publishers.” The presenters discussed this United Kingdom Serials Group initiative to establish standard practices for title transfers between two publishers. Recent updates were provided, and Diven provided a publisher’s perspective on the challenges of title transfers.

Sandy Hurd (Innovative Interfaces) presented a session entitled, "Got Chopsticks? Get SUSHI." Hurd described the Standardized Usage Statistics Harvesting Initiative (SUSHI) that will automatically gather COUNTER-compliant usage statistics and transmit these statistical reports to libraries' information systems seamlessly. Hurd described work that has been done thus far and challenges that remain.

Another session, entitled "Implementing ERMS: Opportunities and Challenges" was presented by Rebecca Kemp (UNC Wilmington) and Jeff Campbell (UNC Chapel Hill). Kemp and Campbell described what an ERM module does and some of the challenges of implementation. These included customizing the ERM, organizing and creating documentation, workflow changes, training or retraining staff, and integration with already-existing practices and resources.

Rob Wolf (UNC Pembroke) led a concurrent session, "User-Based Serials Collection Development." Wolf described how UNC Pembroke's library has used innovative methods of collection development, including consulting

reference librarians for their recollections of frequently requested journals as well as usage logs and interlibrary-loan requests.

The closing keynote was entitled, "To Boldly Go: Transforming Cataloging and Catalogs to Meet User Needs." Presenter Regina Romano Reynolds (National Serials Data Program) first outlined the user needs of the Net Generation. Today's students would like libraries to aspire to the ease of use and customer-friendliness of Internet search engines, bookstores and coffee bars. Reynolds then discussed how the library has historically responded to user needs, i.e., in the creation of metadata. Reynolds asked whether there is a way to reduce the duplication of metadata created for the ISSN program, ONIX, and library catalogs. Lastly, Reynolds discussed the new CONSER standard serials record as a case study in a new practice that has the potential to save cataloging time while still retaining a high standard of metadata creation. Reynolds ended with the hope that libraries will continue to determine how best to serve the user, given all the new technologies at our disposal.

MISSISSIPPI STATE UNIVERSITY HOSTS NASIG-SPONSORED WORKSHOP ON E-RESOURCES AND LIBRARIES

Reported by Patrick L. Carr

For a seventh year, Mississippi State University (MSU) Libraries hosted an e-resource workshop for information professionals working in libraries across the Southeast. Co-sponsored by NASIG, MSU Libraries, EBSCO Information Services, Haworth Press, and SirsiDynix, this year's workshop was held at Mitchell Memorial Library on July 20, 2007. Titled "Black Cats & Broken Links: Dispelling E-resource Superstitions," this workshop provided the approximately one hundred attendees with valuable insights and knowledge that will enable them to overcome the many challenges related to the role and management of e-resources in libraries.

The workshop featured four presentations given by leading innovators in the field of e-resources and libraries. Keynote speaker Stephen Abram got the workshop off to a lively and thought-provoking start with his presentation "Our User Experience: Puzzle Pieces Falling in Place." Drawing on his experiences as Chief Strategist of the SirsiDynix Institute, Abram argued that

libraries' tools for information access and management must evolve in light of the changing needs and expectations of users. The presentation explored this topic by discussing the information environment in which libraries currently exist and highlighting the conceptual challenges that information professionals must overcome to succeed. Abram ultimately provided attendees with ten key recommendations that will allow their libraries to thrive in the future.

The workshop's second speaker was Tim Bucknall, Assistant Director for University Libraries at the University of North Carolina at Greensboro. In his presentation, "Are Consortium 'Big Deals' Cost-Effective? A Comparison and Analysis of E-Journal Access Mechanisms," Bucknall provided attendees with detailed data regarding the various e-journal acquisition models that his library has explored in recent years. Comparing individual subscriptions, pay-per-view access, and

consortium packages, Bucknall analyzed the advantages and disadvantages of each option, including cost-per-use and the impact on collection development at the library. Ultimately, Bucknall advocated that the advantages of consortial partnership for e-journal access—embodied in his development of the Carolina Consortium—can often provide a library's users with the greatest amount of e-journal access at the lowest cost.

The workshop's third presentation, titled "ERM on a Shoestring: Betting on an Alternative Solution," was co-presented by Dalene Hawthorne, Head of Systems and Technical Services at Emporia State University, and Jennifer Watson, Head of Electronic and Collection Services at University of Tennessee Health Sciences Center Library. Hawthorne and Watson's presentation provided attendees with snapshots of how two libraries with limited resources have developed innovative ways to use existing tools in order to effectively manage e-resources. Watson began the presentation by describing how her library has utilized three separate tools—a Filemaker Pro database, a MySQL database, and the Blackboard course management system—in order to successfully manage the licensing, access, and invoicing terms of her library's collection of e-resources. Hawthorne's portion of the presentation provided an alternative e-resource management strategy which utilizes the acquisitions module of her library's ILS.

The workshop's final presentation was given by Oliver Pesch, Chief Strategist at EBSCO Information Services. Pesch's presentation, titled "Library Standards and E-resource Management: A Survey of Current Initiatives and Standards Efforts," provided attendees with a whirlwind tour of the standards and initiatives which are currently shaping how libraries manage and provide access to e-resources. Among the topics that Pesch described in his presentation were organizations leading the way in the development of e-resource-related standards and the role that specific standards and initiatives play over an e-resource's lifecycle.

Based on the enthusiastic evaluations submitted by attendees, this year's workshop can be deemed a success. While Abram's presentation inspired the attendees to contemplate the larger philosophical questions related to the evolving role of e-resources in libraries, the presentations of Bucknall, Hawthorne and Watson, and Pesch all brought to light specific tools, trends, and strategies that promise to shape the future of e-resources. Article-length write-ups of each of these presentations are to be published in an upcoming issue of *The Serials Librarian*. At present, the workshop speakers' PowerPoint slides and handouts are accessible at <http://library.msstate.edu/nasig/schedule.html>. Audio recordings of the presentations, along with the presenters' PowerPoint slides and handouts, are accessible at <http://library.msstate.edu/nasig/schedule.html>.

TITLE CHANGES

[Note: Please report promotions, awards, new degrees, new positions, and other significant professional milestones. You may submit items about yourself or other members to Kurt Blythe (kcblythe@email.unc.edu). Contributions on behalf of fellow members will be cleared with the person mentioned in the news item before they are printed. Please include your e-mail address or phone number.]

CHRIS BRADY says of his June 5th change from being Serial and E-Resources Catalog Librarian at Baylor University to being Catalog and Government Documents Librarian at Baylor Law School that, "Six months ago I wouldn't have thought I would be making this move now. I was quite happy with my old job. But I liked helping out over at the law school this spring while there was a vacancy, and now I am over here full time." Chris may now be found at:

Chris Brady
Catalog and Government Documents
Librarian
Baylor Law School Library
PO Box 97128
Waco, TX 76798-7128
Tel.: (254) 710-4914
Fax: (254) 710-2294
E-mail: C_Brady@baylor.edu

Similarly staying at his institution is **PATRICK CARR**, who has switched, as of December 2006, from being Mississippi State University's Serials Librarian to being their Serials Coordinator. His contact info is now:

Patrick L. Carr
Assistant Professor/Coordinator of Serials
Mississippi State University Libraries
PO Box 5408
Mississippi State, MS 39762
Tel.: 662-325-8184
E-mail: pcarr@library.msstate.edu

PETER FLETCHER has changed institutions along with titles, having begun work on July 2, 2007 as Cyrillic Catalog Librarian at the UCLA Cataloging and Metadata Center, after working as Serials and Electronic Resources Cataloger at Tulane University.

JULIE KANE has likewise moved across the country, having reported to her new position as Head of Technical Services at Sweet Briar

College on August 6, 2007. Of leaving Stanford Law School, where she was a Serials Librarian/Cataloger, Kane says, "Since my husband and I are originally from Vermont, we wanted to get back to the East Coast to be closer to our families after 6 years in California. I'm excited for the challenge of a new position with greater responsibilities in a very close-knit community setting - all of the faculty and staff I've met have been extremely welcoming and supportive. I will miss my colleagues at Stanford Law but am thrilled to begin work in this wonderful new community, to be in the same time zone as our families, and to experience all four seasons again!"

Staying in the eastern United States, but with a long move behind him, nonetheless, is **LEE KRIEGER**, who left his position as Collection Development Special Projects Librarian at the University of Miami to start work April 16, 2007 as Manager, Collection Development & Technical Services for the Library System of Lancaster County (PA). Krieger says of the move that, "It gave me an opportunity to move back to my home state and to an area (Central Pennsylvania) that I already had lived in before and loved, with the added bonus of not having to worry about hurricanes anymore! Also, after 18 years of dealing exclusively with acquisitions, this position gave me a chance to revitalize my interest in technical services librarianship by giving me new responsibilities in related areas and in a different environment, that is, public libraries." However, Krieger adds that, "unfortunately, I have very little to do with serials anymore, but I still follow the news with interest."

ALISON MAJEAU remains at Worcester State College, but, as of March 12, 2007, has left her position there as a serials consultant for a permanent position as Serials Librarian. Majeau says of the opportunity that, "Worcester State College had been without anyone in the Reference/Periodicals librarian position for a number of years. My first order of business was

to catalog and create access through our website and OPAC to the 100+ online journals that we have been paying for but unable to access. I'm now responsible for reorganizing the entire serials workflow into one instead of three departments, in addition to collection analysis and preservation." Majeau adds that, "It's nice to be back in NASIG, which I was a member of from 1983-1997 when I was Editor of the Boston Library Consortium Union List of Serials."

DENA SCHOEN began work at East View Information Services, Inc. as Director of Sales on January 15, 2007. Schoen's new employers noted in a February 2007 press release that her "strengths include a substantial career serving scholarly and academic libraries with print, subscription and electronic resources. She comes to East View from German bookseller and subscription agent OTTO HARRASSOWITZ GmbH & Co., where she led a sales team as Director of Sales for North America." From her office in Seattle, Washington, Schoen feels "ideally situated to develop East View's business relations with western United States and Canadian libraries and research institutions. I will support customers worldwide."

Still at Grand Valley State University, but with a new title and new job focus, is **BOB SCHOOF**S.

Schoofs reports of his change from Periodicals Librarian to Arts & Humanities Librarian that, "I began my new job in May of 2006. It happened as the result of a restructuring in the library that did away with the Periodicals Department. I wrote an article about the restructuring titled 'Abolish the Periodicals Department,' which I think NASIG members will find interesting." Published in *College & Research Libraries News*, the article may be found at: <http://tinyurl.com/y6excj>. Schoofs goes on to say, "I am still involved with serials in various ways, but I now spend much more time teaching and working with the 5 academic departments to which I am now assigned as liaison: history, writing, philosophy, classics, and liberal studies." Schoofs may be contacted at:

Bob Schoofs
Arts & Humanities Librarian
Grand Valley State University
E-mail: schoofsr@gvsu.edu

JOHN SKRTIC is also no longer a Periodicals Librarian, having left his position in the Periodical Center of the Cleveland Public Library to assume a new role as Cleveland Public's Assistant Head, General Reference Department, in addition to serving as its Serials Committee Chair.

CALENDAR

Lillian DeBlois, Calendar Editor

[Please submit announcements for upcoming meetings, conferences, workshops and other events of interest to your NASIG colleagues to Lillian DeBlois, lillian_deblois@msn.com. Contents of the calendar are continuously updated.]

October 4-7, 2007

LITA National Forum

“Technology With Attitude”

Denver, Colorado

<http://www.ala.org/ala/lita/litaevents/litanationalforum2007denver/forum2007.cfm?CFID=92854325&CFTOKEN=84875927>

October 19-24, 2007

American Society for Information Science and Technology (ASIS & T)

Annual Meeting

“Joining Research and Practice: Social Computing and Information Science”

Milwaukee, Wisconsin

<http://www.asis.org/Conferences/AM07>

October 27, 2007

Potomac Technical Processing Librarians

82nd Annual Meeting

“Show Me the Money! 21st Century Acquisitions and Collection Development”

Government Printing Office, Washington, DC

<http://www.lib.virginia.edu/ptpl/2006mtg.html>

October 29-31, 2007

Internet Librarian

Monterey, California

<http://www.infoday.com/conferences.shtml>

November 7-10, 2007

Charleston Conference Issues in Book and Serial Acquisitions

27th Annual Conference

Charleston, South Carolina

<http://www.katina.info/conference/>

January 11-16, 2008

American Library Association (ALA)

Midwinter Meeting

Philadelphia, Pennsylvania

<http://www.ala.org/ala/eventsandconferences/midwinter/2008/home.htm>

February 2008

Western Chapters of the Medical Library Association (MLA)

Annual Meeting

Las Vegas, Nevada

<http://www.mlgsc.mlanet.org/jointmeetings.htm>

March 25-29, 2008

Public Library Association (PLA)

12th National Conference

Minneapolis, Minnesota

<http://www.placonference.org/>

May 16-21, 2008

Medical Library Association (MLA)

Annual Conference

Chicago, Illinois

<http://www.mlanet.org/am/meetings.html>

June 5-8, 2008

NASIG

23RD Annual Conference

Phoenix, Arizona

<http://nasignews.wordpress.com/2007/01/22/221-nasig-conference-site-selection/>

June 15-18, 2008

Special Library Association (SLA)

Annual Conference

Seattle, Washington

<http://www.sla.org/content/Events/index.cfm>

June 26-July 2, 2008

American Library Association (ALA)

Annual Conference

Anaheim, California

<http://www.ala.org/ala/confservices/upcoming/upcomingconferences.htm>

October 20-22, 2008

Internet Librarian

Monterey, California

<http://www.infoday.com/conferences.shtml>

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