

Vol. 25, no. 3 September 2010 eISSN 1542-3417

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1 NASIG Newsletter September 2010

Conference Planning Committee ensured that all of our needs were attended to, including some relatively mild (for Palm Springs!) weather. The 25th Anniversary Task Force put on an especially fun evening of celebration and memories. For those who found the heat a bit too much, there were several cool and restorative pools at the lovely Las Palmas resort.

We're currently waiting for the final report from the Evaluation & Assessment Committee, but I can tell you from comments I've seen on the conference evaluation survey – and from my own, personal perspective – one of the big hits this year was the addition of the vendor exposition. In fact, the overwhelming majority of comments on the survey were very positive. One of the survey responders said, "YESYESYES—do this again!!!" Don't worry, we will. The financial aspect of the vendor expo was an undeniable benefit to our organization as a whole. Receiving payment for expo space from our vendors meant we were able to hold the conference registration fees at the 2009 prices. For library-based members, the vendor expo meant those folks who attend no conferences other than NASIG during the year were able to visit with vendor members they might not otherwise see. Feedback from our vendors indicates that they appreciate having the expo limited to one afternoon. This allows them to finish the expo, get into their NASIG-casual clothes, and participate in the rest of the conference with everyone else. So, look forward to this becoming another NASIG tradition.

Continuing Education

The Continuing Education Committee is looking for ways to bring more educational opportunities to the NASIG membership. The committee will soon be conducting a survey asking about content and modalities (in person, web-based, etc.) to get ideas about what the membership needs and wants. Keep an eye out for that and please respond! If you have ideas for workshops, seminars, unconferences, etc., please contact them at cec@nasig.org. One upcoming event, co-sponsored by NASIG, is the 9th Annual MidSouth eResource Symposium, to be held at Mississippi State

University on September 16th, 2010. For more information, see http://library.msstate.edu/eresource. Also, because of our collaboration with NISO, NASIG members are able to attend NISO Webinars and Forums at NISO member rates. More information on upcoming NISO events can be found on the NASIG home page, as well as http://www.niso.org/news/events/2010/.

Nominations & Elections

It's that time of year! The call for nominations has been issued, and the Nominations & Elections Committee will receive your nominations until October 11th, 2010. This year we will elect a vice president/president-elect, treasurer and three members at large. Nominations are anonymous, and you may submit multiple names for one office. It's not necessary to check with the people you nominate; the committee always asks those who have been nominated if they are willing to stand for election. As always, self-nominations are welcome!

Stay Tuned...

Some of you may have heard me say that I am already wildly in love with western North Carolina -- and I haven't even lived here for leaf season yet! Stay tuned for my breathless descriptions of autumn in the Smoky Mountains. Until next time, talk to y'all later!



Treasurer's Report

Lisa Blackwell, NASIG Treasurer

BALANCE SHEET (Includes unrealized gains) As of 08/17/2010

		Interest
ASSETS	Monies	rate
Bank of America		
accounts		
Charles Schwab		
(account closed)	\$0.00	0.01%
CHECKING-264	\$5,113.96	n/a
SAVINGS-267 (account		0.10%
closed)	\$0.00	
TOTAL Bank of		
America funds	\$5,113.96	
INVESTMENTS		
JPMorgan Chase Gov't		
Bond (pending)	\$51,336.18	0.04%
Chase accounts		
Business Checking -		0.01%
4961	\$25,306.20	
High Yield Savings –		0.25%
1652	\$260,117.18	
LIABILITIES	\$0.00	
EQUITY	\$341,873.52	
TOTAL LIABILITIES &		
EQUITY	\$341,873.52	

^{*}The NASIG budget runs on a calendar year for tax purposes.

NASIG COMMITTEE EXPENSES Jan-Aug 2010

	2010	2010
NASIG committees	estimate	expenses
Administration	\$25,600.00	\$12,929.17
Archives	\$150.00	\$0.00

50.00 \$18,115.56 \$0.00 \$0.00 05.00 \$1,000.00
OF OO \$1,000,00
05.00 \$1,000.00
50.00 \$961.91
00.00 \$0.00
00.00 \$9,168.75
80.00 \$0.00
\$0.00 \$0.00
50.00 \$0.00
00.00 \$66.19
\$0.00 \$0.00
80.00 \$97.92
75.00 \$110.70
12.42 \$0.00
00.00 \$452.26
00.00 \$0.00
25.00 \$9,303.92
00.00 \$175.00
70.00 \$19,788.79
\$5,000.00
(EBSCO
sponsorship)
47.42 \$77,170.17

CONFERENCE FINANCIALS 8/1/2009-7/31/2010

	Conference	25th
Category Description	Expenses	Anniversary
INFLOWS		
coaster sales	\$0.00	\$45.00
NASIG Treasury monies	\$0.00	\$12,000.00
organizational		
sponsorship	\$39,018.00	\$5,000.00
Vendor expo at annual		
conference	\$10,000.00	\$0.00
Cafe Press sales	\$36.43	\$0.00

Conference Registration	\$132,676.00	\$0.00
Preconference		
registration	\$3,625.00	
extra conference meals		
(includes 25th Anniv)	\$1,740.00	
lottery drawing	-\$100.00	\$0.00
lottery drawing	\$278.00	
TOTAL INFLOWS	\$187,273.43	\$17,045.00
OUTFLOWS		
conference design	\$140.00	\$15.00
preconf wrkshp	\$467.99	\$0.00
conf entertainment	\$0.00	\$600.00
Conference - Housing	\$10,657.48	\$0.00
Conference - Meals	\$75,295.48	\$30,456.53
conf souvenirs	\$0.00	\$1,531.04
Conference - Office	\$408.98	\$0.00
Conference Photocopying		
& Printing	\$608.46	\$0.00
25th Anniv supplies	\$0.00	\$3,277.66
Conference supplies	\$6,285.63	\$0.00
Conference Speakers	\$2,250.00	\$0.00
Conference refund	\$4,205.00	\$0.00
Palm Springs Conference		
prepayment	\$62,000.00	\$0.00
audio-visual	\$20,660.85	\$0.00
conference calls	\$0.00	\$953.56
TOTAL OUTFLOWS	\$182,979.87	\$36,878.79
OVERALL TOTAL	\$4,278.56	-\$19,788.79

Call for Nominations

Eleanor Cook and Pam Cipkowski, Nominations & Elections Committee Chairs

The Nominations & Elections Committee invites nominations for vice president/president-elect and three member-at-large board positions. Information on each office is found at:

http://www.nasig.org/about adminofficers.cfm.

If you have someone in mind that would be great for a NASIG office, including yourself, please complete the

electronic nomination form available at: http://www.nasig.org/survey.cfm?pk_survey=26&**insert_pk_individual**

You will need to login using your NASIG login and password. All nominations are anonymous even though you are logged in. You may submit multiple nominations for one office. If you have trouble with the online form, please send nominations to Eleanor Cook, N&E co-chair at cooke@ecu.edu.

All active NASIG members are eligible for nomination except current members of the Nominations & Elections Committee http://www.nasig.org/committee-nominations-and-elections.cfm.

The deadline for nominations is Monday, October 11, 2010.

Please contact the Nominations & Elections Committee chairs if you have any questions:

Eleanor Cook, <u>cooke@ecu.edu</u>, or Pam Cipkowski, <u>pcipkowski@luc.edu</u>

Treasurer Nominations

Greetings NASIG members!

Due to confusion on our part and the fact that the new treasurer election process is in its first iteration, we are here to announce that NASIG needs to elect a treasurer-elect in 2010/2011 so that person can serve "intraining" during Lisa Blackwell's second year of service as acting treasurer.

An additional form for treasurer nominations has appeared on the NASIG nominations site, and we encourage you to nominate away.

Also, if you haven't had the opportunity to nominate for the other offices that are open, let me use this as a reminder for you to do that as well! Nominations for all openings close on Monday, October 11, 2010.

As always, please contact either me or co-chair, Pam Cipkowski, if you have any questions or concerns about the nominations process.

Thanks,
Eleanor Cook
Co-chair, NASIG Nominations & Elections Committee

Free Conference Registration Winner

Evaluations and Assessment is pleased to announce the winner of the drawing for a free conference registration. The winner is Gail Julian, head of acquisitions at Clemson University Libraries.

Congratulations Gail!

Executive Board Minutes

May 2010 Conference Call

Carol Ann Borchert, NASIG Secretary

Date: May 12, 2010

Attending:

Rick Anderson, President
Katy Ginanni, Vice-President/President-Elect
Jill Emery, Past President
Carol Ann Borchert, Secretary
Peter Whiting, Treasurer
Lisa Blackwell, Treasurer-Elect

Members-At-Large:

Bob Boissy
Patrick Carr
Steve Kelley
Christine Stamison
Virginia Taffurelli
Sarah George Wessel

Ex Officio:

Kathryn Wesley

1.0 Welcome (Anderson)

The meeting was called to order at 10:03 AM Eastern Daylight Time.

2.0 Secretary's Report (Borchert)

2.1 Outstanding Action Items

The Board decided that the group of action items pertaining to all Board Liaisons should be added to the working calendar instead of being part of the action items list. Action items were modified to read as follows:

ACTION ITEM: Anderson will ask FDC and/or will work with the Newsletter editors to set up guidelines regarding sizes of ads and length of time ads will run. This should be in the form of a brochure with information and contact information for the Past-President to include when sending conference sponsorship information.

ACTION ITEM: Anderson will send a list to Mark by May 20th of conditions we believe are functionally permanent to which we need to adjust and for which we need to plan. This will be based on feedback from committee chairs.

ACTION ITEM: Blackwell will work with D&D to put procedures in place for handling organizational memberships. She will also have them work with ECC to have the link put on the Join Now page to send interested organizations to D&D for membership processing.

ACTION ITEM: Borchert and ECC will work with the Archivist on web presence and other archives issues.

ACTION ITEM: Carr and Boissy will work with CEC and PPR to create a proposal for better ways to promote the contributions of NASIG's membership in continuing education programs and also to share the content of these contributions with the membership as a whole. **IN PROCESS**

ACTION ITEM: Emery will work with N&E over the course of this year to insure that the manual is complete and posted on the website. **ONGOING**

ACTION ITEM: Ginanni will have instructions for setting up a conference call and a note to use Skype if desired or possible to the committee chairs manual. IN PROCESS

ACTION ITEM: Ginanni will find an advertising coordinator for the Newsletter during 2010/2011 appointments.

ACTION ITEM: Ginanni will ask committee chairs to solicit committee feedback for the contingency planning session, to be sent to Borchert by May 17.

ACTION ITEM: Ginanni will find a replacement for the Web Liaison.

ACTION ITEM: Stamison will ask A&R to submit a formal proposal outlining their suggestions for how to handle the Mexican student award. IN PROCESS

Completed Action Items:

- Boissy will clarify with PPR regarding their role in publicizing the conference and will ask them to add this information to their manual.
- Boissy will ask if PPR has anyone on Facebook who could set up a page for the Annual Conference.
- Borchert will edit the committee guidelines and send a draft to Ginanni for discussion.
- Ginanni will ask continuing chairs to attend the contingency planning session.

 Wessel, Boissy, and Kelley will set up a call to coordinate the publicizing of the annual conference.

There was a discussion about UK travel issues and the possible need to have a contingency plan for the facilitator of the contingency planning session.

We will need a draft of what organizational membership is and what rights come with such a membership.

ACTION ITEM: Boissy and Carr will draft a document outlining defining organizational membership and listing the benefits. They will send this to the Board for discussion.

2.2 Approval of Board Activity Report

Kelley made a motion to approve the Board Activity Report with the corrections, as listed below. Taffurelli seconded the motion, and all voted in favor.

3/10 The Board approved CPC offering a chance at winning one gift certificate worth \$100 for early registrations, with CPC setting the closing date for early registration.

3/10 **VOTE:** Kelley made a motion that, for Tactics Session speakers who are only registering for a single day, NASIG would pay the full one-day registration rate rather than half of the full-conference rate, which is the usual reimbursement for Tactics Session speakers. 10 members voted in favor, with 2 abstentions.

3/10 **VOTE:** After N&E alerted the Board to a major malfunction of the electronic voting processing for the NASIG 2010/2011 election through our content management system (CMS) Arcstone, Emery made a motion that the Board vote to determine if we should try to use Arcstone again to process a re-run of the election OR if we should do an election using Survey Monkey. 11 members voted in favor, with one abstention.

3/10 CPC presented an idea for a conference bag contest this year as a fun way to encourage recycling, rather than providing bags at the conference. The Board approved this idea.

3/10 The Proceedings editors reported an additional 30 copies of the Proceedings beyond their standard list of recipients for complimentary copies. Suggestions were made, including last year's Award winners, the UKSG President, and/or LSOC ambassadors to give as gifts when visiting library schools.

3/10 The Board discussed issues pertaining to organizational sponsorship and dinner payment of members of those organizations. Organizational sponsorship of a given event that may require a separate charge will result in the sponsoring organization having two attendees at the sponsored event free of charge.

3/10 The Board decided to change terminology for committee chairs from "co-chairs" to "chair" and "vice-chair," with CPC being the exception where the term of "co-chair" is retained.

4/10 The Board discussed possible candidates to replace Buddy Pennington as ArcStone Liaison. It was decided to keep the conference registration discount associated with this position, and the position description was altered to indicate it is a two-year appointment.

4/10 The Board decided that, instead of trying to print lists of attendees for each registrant, we will put a list that is current as of April 30 on the flash drives, and post a current copy on the bulletin board at the conference. This way, we can still help people see who is attending and save paper at the same time. The final full list of attendees by name and affiliation can also be posted in the members-only section of the web site after registration closes.

4/10 Boissy made a motion to supply a list of attendees by name and institution to post on the NASIG web site as soon as possible. Anderson seconded. After some discussion, during which it was pointed out that such a list is a benefit for Tier 1 conference sponsors, 10 members voted against and 2 abstained.

4/10 One of the Board members was approached about notifying NASIG members about job openings. It was suggested that job advertisements should be posted in the NASIG discussion forums.

4/10 The Board approved NASIG support for the 9th MidSouth E-Resources Symposium hosted by Mississippi State University Libraries.

3.0 Treasurer's Report (Whiting/Blackwell)

Whiting trained Blackwell in the Treasurer's duties over the weekend and will be helping her with the conference closeout. We currently have \$415,235, and have spent \$20,000 so far on the conference.

4.0 Committee Reports (all)

25th Anniversary Task Force: There has been a flurry of emails. The commemorative coasters are ready, and the Task Force has the Board commemorative statement. The anniversary dinner does not require members to dress up. The Board agreed that would be a very "non-NASIG" thing to request.

Awards & Recognition: A&R would like to see new procedures in place for next year for selecting the Mexican Student Award winner. This year there were some logistical issues.

Bylaws: Nothing to report.

Conference Planning: The Board Liaison had just met with the CPC co-chairs in Palm Springs, and they are very busy.

Conference Proceedings: The 2009 Conference Proceedings are now published online on the NASIG site for members. The editors have updated the Proceedings manual, and the new editor is working out well.

Continuing Education: Nothing to report beyond the annual report already submitted.

Database & Directory: There is a discrepancy in the data on their annual report due to a known system problem, and they are working on correcting this.

Electronic Communications: The have completed the communications survey, have the raw data, and will report to the Board.

Evaluation & Assessment: Janice Lindquist is in touch with PPC to make sure she has the evaluation form.

Financial Development: Nothing to report.

Library School Outreach: They have a draft of their committee manual. They still need more ambassadors.

Membership Development: Nothing to report beyond annual report already submitted.

Mentoring: The call for mentors has been posted and they've received a good response. IOP will be sponsoring the first-timers reception.

Newsletter: They now have a copy editor and are getting the blog edition wrapped up before the conference. The .pdf edition is getting caught up using the Google site.

Nominations & Elections: N&E is working diligently on their manual, which will be posted by the June meeting.

ACTION ITEM: All Board Liaisons will notify committee chairs that manuals will be posted publicly. If there is a compelling reason not to post a committee manual for public availability, the committee chair needs to let the Board Liaison know and the Board will discuss it.

Program Planning: The schedule is set and flash drives are being loaded.

Publications & Public Relations: Conference publicity has been done. It was reported that we are okay on the

room reservation block, and there are 344 full registrations as of May 12.

The remaining agenda items will be discussed via email or at the June Board meeting.

The meeting adjourned at 11:04 AM Eastern Daylight Time.

Minutes submitted by: Carol Ann Borchert NASIG Secretary May 20, 2010

June 2010 Meeting

Carol Ann Borchert, NASIG Secretary

Date: June 3, 2010

Place: Rancho Las Palmas Hotel, Palm Springs, California

Attending:

Rick Anderson, President
Katy Ginanni, Vice-President/President-Elect
Jill Emery, Past President
Carol Ann Borchert, Secretary
Peter Whiting, Treasurer
Lisa Blackwell, Treasurer-Elect

Members-At-Large:

Bob Boissy
Patrick Carr
Steve Kelley
Christine Stamison
Virginia Taffurelli
Sarah George Wessel

Ex Officio:

Kathryn Wesley

Guests:

Anne Mitchell and Morag Boyd, *PPC co-chairs*Cory Tucker and Mike Markwith, *CPC co-chairs*Joyce Tenney, *Site Selection*Steve Shadle, incoming Vice President
Clint Chamberlain, incoming member-at-large

Buddy Pennington, incoming member-at-large Jenni Wilson, incoming member-at-large Angela Dresselhaus, incoming *ex-officio*

1.0 Welcome (Anderson)

The meeting was called to order at 8:07 a.m.

2.0 Secretary's Report (Borchert)

2.1 Approval of May 12, 2010 Minutes

Taffurelli made a motion to approve the May 12 conference call minutes. Blackwell seconded. All voted in favor.

2.2 Approval of Board Activity Report Since the May Conference Call

Anderson made a motion to approve the following Board Activity Report for addition to the current minutes. Kelley seconded. All voted in favor.

5/10 **VOTE:** Anderson made a motion that NASIG be a sponsor for the OVGTSL (Ohio Valley Group of Technical Services Librarians) conference in 2010. This involved a mention of NASIG in the program, brochures for attendee packets and display of the NASIG banner. Motion was seconded by Ginanni. 10 votes in favor, 2 abstentions.

5/10 The Board selected the following topic for the NASIG Business Meeting on June 4: Presentation of results of the ECC survey on NASIG communications followed by a brainstorming session of optimal methods of communication between NASIG and its membership.

5/10 **VOTE**: Anderson made a motion to alter Joyce Tenney's charge for Site Selection to include authority to negotiate and make arrangements for the 2013 NASIG Annual Conference facilities. Whiting seconded the motion. All members voted unanimously in favor of this motion.

5/10 The Board approved the idea of selling extra sets of the 25th Anniversary commemorative coasters. One set needs to go to the archives.

5/10 The Board agreed to continue the practice of drawing a name from the folks filling out the evaluation form to award a free registration for the 2011 conference.

5/10 The Board discussed a question from the Telecommunications Task Force about the use of Skype for committee conference calls. Because some institutions will not allow members to download additional software for security reasons, using Skype might also include the need to pay for Skype-to-landline calls. The cost of these calls is \$0.021 per minute. Given the low cost, the Board encourages committees to use this option at their discretion and agreed that we can set up a NASIG ID in order to bill NASIG for the cost of these calls.

2.3 Action Items Outstanding

Following is a list of action items still outstanding as of June 3, 2010, with completed actions from previous reports listed below.

Not Done/In Progress

ACTION ITEM: Anderson will ask FDC and/or will work with the *Newsletter* editors to set up guidelines regarding sizes of ads and length of time ads will run. This should be in the form of a brochure with information and contact information for the Past-President to include when sending conference sponsorship information.

ACTION ITEM: Blackwell will work with D&D to put procedures in place for handling organizational memberships. She will also have them work with ECC to have the link put on the Join Now page to send interested organizations to D&D for membership processing.

ACTION ITEM: Boissy and Carr will draft a document outlining and defining organizational membership and listing the benefits. They will send this to the Board for discussion.

ACTION ITEM: Borchert and ECC will work with the Archivist on web presence and other archives issues.

ACTION ITEM: Emery will work with N&E over the course of this year to insure that the manual is complete and posted on the website. **ONGOING**

ACTION ITEM: Ginanni will have instructions for setting up a conference call and a note to use Skype if desired or possible to the committee chairs manual. IN PROCESS

ACTION ITEM: Ginanni will find an advertising coordinator for the *Newsletter* during 2010/2011 appointments.

ACTION ITEM: Stamison will ask A&R to submit a formal proposal outlining their suggestions for how to handle the Mexican Student Award. IN PROCESS

Completed Action Items

- All Board Liaisons will notify committee chairs that manuals will be posted publicly. If there is a compelling reason not to post a committee manual for public availability, the committee chair needs to let the Board Liaison know and the Board will discuss it.
- Carr and Boissy will work with CEC and PPR to create a proposal for better ways to promote the contributions of NASIG's membership in continuing education programs and also to share the content of these contributions with the membership as a whole.
- Ginanni will ask committee chairs to solicit committee feedback for the contingency planning session, to be sent to Borchert by May 17.
- Ginanni will find a replacement for the Web Liaison.
- Anderson will send a list to Mark by May 20th of conditions we believe are functionally permanent to which we need to adjust and for which we need to plan. This will be based on feedback from

committee chairs.

2.4 Working Calendar Updates-Which Committees Did You Not Hear from?

No working calendar additions were reported.

3.0 Treasurer's Report (Blackwell/Whiting)

3.1 Overview 2010 Budget and Expenditures to Date

Whiting reported \$412,526.26 in the NASIG checking account. We currently have \$51,336.18 in the Charles Schwab account. Next year we will move that from the cash fund to a money market.

ACTION ITEM: Anderson will ask FDC to determine how much money we should have in the checking and savings account.

3.2 Donations Update

So far, members have donated \$168. This is lower than last year and may be due to economic factors. It might help to publicize how we used donation money.

ACTION ITEM: Anderson will add it to the President's Manual to send a handwritten thank you note each year to those who donate.

ACTION ITEM: Borchert will add an item for the *Newsletter* calendar to ask the Treasurer for donation information at the end of each year to report on donations in the *Newsletter*.

6.0 Member "Demographic" Survey for Potential Sponsors (Anderson/Emery)

The purpose of this survey would be to provide information regarding a breakdown of our membership for sponsors. In other words, how many people with decision-making power are attending NASIG? We should be able to glean some information from the conference evaluations. There is also information in ArcStone that we can use to run reports. We need to

poll vendors to see what information they need in order to make an informed decision regarding sponsorship, the vendor expo, or other forms of participation. We need to put together a task force with E&A and MDC representation. Emery will be on the task force; Wilson will be the head.

ACTION ITEM: Ginanni and Wilson will select members for a task force to write a proposal to poll vendors for information about what information they need in order to make an informed decision regarding sponsorship, the vendor expo, or other forms of participation. The proposal will include cost estimates and will be sent to the Board.

7.0 NASIG Historian—Archivist or ECC? (Borchert/Boissy)

The NASIG Historian will help select, upload, and maintain photos for the NASIG website. If this is set up as a wiki, other people can help tag the photos. We could add this person to ECC, and he/she would consult with the Archivist to determine what to keep. Alternatively, the Historian could work with the Archivist and consult with ECC on placement of information on the website. The Secretary could be the Board Liaison to this position as she is for the Archivist, rather than this person working under the Archivist.

ACTION ITEM: Ginanni will draft a charge and job description for the NASIG Historian, run it by the Board, and then appoint a Historian.

8.0 CPC (Wessel, Tucker, Markwith)

8.1 Final Conference Registration

There are 366 registrants for the conference, 3 of which were walk-ins, and two new pre-conference registrants. Our break-even point was 425 registrants, but we were okay because of the sponsorship money.

8.2 Conference Budget

Conference budget is on-target.

8.3 Event Planning Update

The resort has been very accommodating. There will be a looping PowerPoint presentation about sponsoring vendors before the sessions. Attendees get 15% off at the resort shops and special spa pricing, and the \$100 gift card drawing for early registrants will be at the opening session.

9.0 PPC (Kelley, Mitchell, Boyd)

There has been one no-show speaker so far. This year, there was a lot of difficulty communicating with vision speakers. PPC recommends using a speaker's bureau rather than having the committee members continue to do this.

User and discussion groups were combined for the first time in the same time slot. There are no lightning talks this year in favor of a no-conflict time this year for committees. PPC will evaluate that for next year.

We are trying to limit the size of panel presentations. One idea is to have the names of all presenters at the time of the proposal, rather than having people added after the proposal is accepted. Sometimes we end up with the same speaker in several different programs. Perhaps we should allow an individual to speak in a maximum of two sessions (not including preconferences) as a co-presenter, but only one presentation as a solo presenter. PPC can add this to their manual. So far, there has been no feedback on the 3-person panel limit.

PPC suggests doing a call for proposals next year instead of a call for proposals or program ideas. Perhaps the first call could just be for proposals, the second call could be for proposals and ideas, and the third call could list some of the ideas in the call for proposals. This way, PPC does not have to hunt for presenters based on the ideas that were submitted.

For discussion groups, PPC suggests having folks sign up at the registration desk next year and let it be more organic and spontaneous. This takes the planning for

discussion groups out of PPC's hands. The User Groups, on the other hand, often have audiovisual needs, so this should be arranged through PPC ahead of time. PPC will still make sure there is a time slot for discussion groups and will coordinate with CPC for managing that. CPC and PPC can evaluate the rooms on-site at our fall Board meeting.

PPC suggests one keynote speaker instead of three vision session speakers, and we could move the time slot for that. PPC will put a proposal together for vision sessions.

For conference publicity, PPC recommends designating a PPC person to feed information to the Publicist. Alternatively, should the Publicist be writing the copy as well as distributing it? They also need to hit social networking sites. The Board may need to revisit the Publicist position.

ACTION ITEM: Kelley and Boissy will rewrite the job description for the Publicist and bring it to the Board.

The official NASIG Facebook page was originally set up by MDC, and should be managed by NASIG.

ACTION ITEM: Ginanni will discuss the NASIG Facebook page with Mykie Howard.

The Twitter account is handled by ECC and feeds into the *Newsletter*. LinkedIn can be handed over to PPR and should include a monthly news blast from the What's New part of the NASIG site. Should Facebook also be handled by PPR?

ACTION ITEM: Chamberlain will ask ECC to add it into their manual that they will take management of the social networking outlets for NASIG. ECC can manage the committee posting rights.

10.0 Site Selection Report (Anderson/Tenney)

2011 and 2012 contracts have been signed. We will go ahead and post the 2012 site information on the NASIG website. Because we are still able to negotiate well in

this economic climate, we will go ahead and start searching for the 2013 site.

11.0 Implementing Organizational Memberships (Blackwell/Boissy)

The organizational contact will be the person who makes payment for the memberships and registration. There can be 3 full members attached to the organizational membership. Organizational members will be on the same calendar as individual members. Organizations will need to be able to change who the 3 members are mid-year if people leave or are promoted. Once the organizational membership goes live, we'll need to fix the multiple places on the NASIG website that state we only accept individual members, and we will have to add references to organizational members.

ACTION ITEM: Ginanni will ask ECC and the Web Liaison to review the website for references to individual memberships that need to be removed and to determine where references to organizational memberships need to be added.

12.0 NASIG Responsibility for Merriman Award Winner in Event of Travel Delays or Emergency Situations (Emery)

Given the recent volcanic activity and how it impacted this year's Merriman Award winner, the Board discussed how to better plan for such an emergency. A&R should recommend that the award winner use part of their stipend to purchase a temporary international phone and have the NASIG President's phone number on hand, since the President will also be at UKSG. We should know where they will be staying in case we need to contact them, and/or they should have a computer with Skype loaded on it. The President should take the NASIG credit card to UKSG in case we need to pick up additional hotel or other expenses for the award winner. It was suggested that the President and Merriman winner should be reimbursed for the additional costs they incurred as a result of their travel delays. Anderson declined for himself, since his institution had already covered his costs.

ACTION ITEM: Anderson will check with this year's Merriman Award winner to see what additional reimbursement she might need retroactively as a result of travel delays.

ACTION ITEM: Anderson and Whiting will add information to the President's and Treasurer's manual indicating that the Board may approve additional funding for the Merriman Award winner and the NASIG President to account for emergency situations.

ACTION ITEM: Anderson will ask FDC to formulate language to add to the existing reimbursement policy to include contingency funding to cover emergencies.

ACTION ITEM: Stamison will ask A&R to add it to their manual regarding the Merriman Award winner, that contingency funding will be made available in case of emergency.

Kelley made a motion to cover expenses, pending Board approval on a case by case basis, according to the reimbursement policy in cases of emergency. Whiting seconded, and all members voted in favor.

13.0 Advertising Coordinator—Newsletter or FDC? (Ginanni)

There will be one person on each committee to handle advertising. The FDC member will procure advertisements, and the *Newsletter* person will receive copy and add into the *Newsletter*.

ACTION ITEM: Anderson will work with FDC to get a pricing list for advertisements.

ACTION ITEM: Ginanni will appoint or select members on FDC and the *Newsletter* to work with advertisements.

14.0 CEC-PPR Proposal (Carr/Boissy)

Many Board members had not had a chance to review the proposal yet. NASIG members could be encouraged

to post notice on non-NASIG presentations in the *Newsletter* and to the Publicist.

ACTION ITEM: All Board Members will review the CEC-PPR proposal and discuss.

15.0 NASIG Internships (Carr)

We could set up a NASIG internship as a project for a library science student. We could divert money from the student grant award, or encourage schools to count this as a fieldwork for credit. Ideas for projects included some of the duties for the NASIG administrative position that was never filled, creating a NASIG Guide, helping to set up an un-conference, or working on the member demographic survey. During the course of this discussion, it was noted that many programs are no longer "library schools," and this term has become outdated.

Anderson made a motion to change the name of the Library School Outreach Committee to the Student Outreach Committee. Ginanni seconded. All voted in favor.

ACTION ITEM: Ginanni will work with the Student Outreach Committee to create a formal proposal for the internship program.

16.0 Newsletter Moving to Open Access Model (Borchert)

The Newsletter would like to move to an open access model, which will help them manage layouts for the PDF version of the Newsletter. A question arose regarding why this was different from the NASIG Proceedings, since the Board had decided not to make the Proceedings open access at this time. The Proceedings are more like a book than a newsletter, and we receive funding from Taylor & Francis for them to publish the Proceedings on our behalf. Another question arose about advertisements. Although Utah State University has not hosted advertisements in their other OA publications, they are okay with us doing so.

The PDF will be posted as a single file with advertisements embedded.

Ginanni made a motion to approve the proposal to have Utah State University publish the *NASIG Newsletter* via bepress as an open access document. Stamison seconded. All voted in favor.

17.0 Other Business (All)

The documents for the contingency planning session held on June 2 will be distributed for discussion among the Board at a later date.

ACTION ITEM: Ginanni will send a copy of the raw documentation to the outgoing Board members and all attendees of the contingency planning meeting when that information is available from Mark Lane.

ACTION ITEM: All Board members will discuss how to turn the contingency planning documentation into a public document for distribution and discussion among the NASIG membership.

Ginanni made a motion to adjourn the meeting, seconded by Boissy. All voted in favor by leaping from their chairs and preparing to leave the room. The meeting adjourned at 12:01 p.m.

Minutes submitted by: Carol Ann Borchert NASIG Secretary June 13, 2010

Minutes approved by NASIG Executive Board July 23, 2010.

26th Conference (2011)

CPC Update

Shana McDanold and Karen Darlanding, Co-Chairs

Planning for the 2011 NASIG Conference is underway! The 2011 Conference will be held in St. Louis, MO, home of the Gateway Arch and Cardinals baseball. This year's theme is "NASIG 2011: Gateway to Collaboration." The logo is currently being designed and will be posted on the website as soon as it's approved.

The hotel is the beautiful Hilton St. Louis at the Ballpark in the middle of downtown. Not only is the hotel near Busch Stadium (home of the Cardinals), but it's also near the MetroLink light rail, connecting the airport to downtown and allowing for easy and safe transportation all around St. Louis. We're not sure yet if the Cardinals will be at home, but our CPC has a mole lurking who will tell us the minute the Cardinals' 2011 schedule is posted, and we'll pass the information on to you!

St. Louis is known for more than baseball and beer. There's Ted Drewes Frozen Custard, a variety of free museums, delicious eats (with ample vegetarian options), and great neighborhoods, each with its own unique style. St. Louis's own Forest Park, home to many of the city's museums, is also 50% larger than Central Park in New York and has a network of beautiful paths for easy walking and running.

Your CPC is hard at work setting up events and researching the local attractions, like the Gateway Arch and the local museums, and more. Watch the conference website for updates.

Meet us in St. Louis!

2011 Call for Proposals

Anne Mitchell and Michael Hanson, PPC Co-Chairs

NASIG 26th Annual Conference Gateway to Collaboration June 2-5, 2011 St. Louis, Missouri The 2011 Program Planning Committee (PPC) invites proposals for preconference, Vision, Strategy, and Tactics sessions. The program planners are interested in hearing from publishers, vendors, librarians, and others in the field of serials and electronic resources about issues relating to scholarly communication, publishing, resource acquisition, management, and discovery. Proposals based on emerging trends, case studies, or descriptive and experimental research findings are encouraged.

To propose a program or idea, please use the <u>online</u> <u>form</u>. This Call for Proposals will close on September 17, 2010.

Please note the following:

- The Program Planning Committee reviews all submitted proposals and hopes to notify applicants of the status of their proposals in December 2010.
- The Program Planning Committee welcomes proposals that are still in the formative stages, and may work with potential presenters to focus their proposals further.

- Proposals should name any particular products or services that are integral to the content of the presentation. However, as a matter of NASIG policy, programs should not be used as a venue to promote or attack any product, service, or institution.
- Time management issues generally limit each session to two speakers for Tactics sessions or three speakers for Strategy sessions. Panels of four or more speakers must be discussed in advance with the Program Planning Committee, prog-plan@nasig.org.
- Proposals may be accepted as a different type of session than was originally suggested; this decision is at the discretion of the Program Planning Committee.
- Proposals may be accepted as NASIG has a reimbursement policy for conference speakers whose organizations do not cover expenses.

Inquiries may be sent to the PPC co-chairs, Anne Mitchell and Michael Hanson, at: prog-plan@nasig.org.

We look forward to seeing you in St. Louis!

25th Conference (2010) Wrap-Up

Interview of Selden Durgom Lamoureux,
Electronic Resources Librarian at the North
Carolina State University Libraries
and the John Merriman Joint NASIG/UKSG
Award Winner for 2010

Lisa Kurt, Head of E-resources and Serials, University of Nevada, Reno

It was a pleasure interviewing this year's John Merriman Joint NASIG/UKSG Award winner, Selden Durgom Lamoureux. Selden shares with us not only her professional background and how she came to her current role as electronic resources librarian at North Carolina State University, but she also gives us a fantastic glimpse into the UKSG conference. We are fortunate to hear of her amazing time in Edinburgh, Scotland, despite her dealing with a rather exciting

volcanic incident that impacted much of Europe. Yet, Selden took it all in with grace and cheer.

Congratulations Selden on being the 2010 Merriman award winner. Can you start by telling us a little bit about your current position and how you have been involved in serials?

I'm an electronic resources librarian and work in Acquisitions at North Carolina State University. Most of my career in libraries has been focused on the electronic side of serials, first with licensing and management, and now with an emphasis on tools, workflow, and distribution of work. I feel very fortunate to be in a setting with extraordinary colleagues, both professionals and paraprofessionals, with the imagination and will to re-imagine what it means to be serialists.

Can you tell us what initially lead you to NASIG and why you continue to stay involved?

Like many of my colleagues, I'm an accidental serialist. I fell into Serials while working in a special library as a graduate student. We were short-handed and I wound up taking on serials management for a collection of 400 titles (what a shock to move to a university library with a print serial collection 50 times that size!). When I accepted my first full-time professional position eleven years ago, my boss, Janet Flowers, sent me to NASIG even before I had started my job. She thought then that NASIG was essential to my serials education and she was right. I have never missed a NASIG conference since.

What prompted you to apply for the Merriman award and what was your reaction when you found out that you were the recipient?

In addition to the obvious attraction of traveling to Scotland, I was hoping to be able to meet colleagues from JISC (Joint Information Systems Committee), the national UK consortium, and those from EDItEUR, the innovative standards body in the UK, with whom I'd had email and phone exchanges. We had not previously had much opportunity to meet face to face, and I wanted to be able to engage with them in a long list of conversations about what they had done to develop certain standards and what they were planning. In addition, of course, I was really looking forward to meeting my counterparts from the UK and comparing notes.

Give us some of your first impressions of the UKSG conference. Was there anything that surprised you?

The multitude of languages! This conference attracts serialists from all over Europe, and I hadn't realized UKSG reaches so far beyond the UK borders. It was truly an international gathering. The next surprise was the ratio of publishers to librarians – UKSG has a more equal balance of the two. There were not quite so many subscription agents, but it seemed to me that half the attendees were publishers. At NASIG we have

talked about encouraging more participation from publishers. After experiencing a conference where that is the case, I can confirm that it provided not only a good opportunity for exchange, but shifted my awareness of librarians' place in the serial community.



In attending NASIG previously, what were your expectations of UKSG and how were those expectations different from what you experienced?

I expected a whirlwind of sessions, racing from one to the next and never quite being able to get to everything I wanted. That's what a typical NASIG conference is like. At UKSG there was a more laid back schedule with plenty of breaks to socialize, and a vendor show ran for much of the conference. The content of the programs and the opportunities for conversation, however, were top rate (as expected, of course!).

You were at the conference during all of the dramatic volcano action that was happening- can you tell us about this adventure?

If you have to send someone into an ash cloud, I'm your girl. I was in the very fortunate position of having no pressing personal or professional obligations waiting back home, so could enjoy the adventure. I did have a few grim hours when it was clear I wouldn't be flying back via my return ticket, and that passage on a freighter couldn't be had for love or money (or, no time in the foreseeable future, at any rate). But it wasn't

long before I had a plan B. Throughout, there was a tight knit group of "the stranded" who offered email advice, updates and support from all over the UK and Europe (Todd Carpenter of NISO gets the award for the most convoluted and heroic effort to return – but that's a story you'll need to get from Todd). Best of all, Jill Emery was also stranded in Edinburgh. We teamed up on pub-night and travelled together to Ireland from where we each were able to get a flight home 10 days after the end of the conference.

Despite the volcanic ash adventures, what was Edinburgh, Scotland like for a conference location?

Fabulous!

What was your favorite UKSG session and why was it your favorite?

That's hard; there were several. But if I have to choose, I'll say it was the session on scholarly publication. The room was crowded, but there were only a handful of librarians so most of the session participants were publishers. It was so interesting to hear what was on their minds, hear firsthand what puzzles them about libraries (and librarians). It was also gratifying to hear SERU (Shared E-Resources Understanding) mentioned as an alternative to the expense and labor of negotiating licenses. I loved being able to follow up afterward with publishers I had met during the session. In fact, conversations outside of sessions are where so much of the value of a conference lies. I had a number of memorable conversations with librarians, publishers, and, especially, members of JISC and EDItEUR.

How do you think this experience in attending UKSG will change your career?

Probably, foremost, it strengthens my belief in the power of consortia. Seeing what JISC has accomplished was extremely impressive. It also pulled me out of a

US-centric view of libraries. I'm not sure how long I will be able to sustain that perspective, but I hope for the rest of my career.

I think a lot of NASIG members would be interested to know, what are the differences between NASIG and UKSG?

Scale matters. I was very aware that England is approximately the size of North Carolina, and the UK about twice that. The geographic expanse that NASIG encompasses makes pulling the serials community together in one place every year much more of a challenge. The UK also enjoys much more homogeneity in their laws and government support than we do across North America. Combined with scale, that seems to make communal action easier. The other most striking difference between the two organizations, I think, is the mix of people from the various parts of the serial community. As I mentioned earlier, the UKSG drew a more equal number of librarians and publishers. I will say, however, that the energy, commitment, and creativity of serialists seems absolutely consistent across organizations – being at the UKSG Conference had more in common with a NASIG Conference than any differences I can note.

For those that might be interested in going to UKSG and perhaps applying for the Merriman award, what advice would you give them?

DO IT! It's one of the best conference experiences imaginable.

Thank you so much Selden for allowing me to interview you and speak with you about your exciting UKSG adventures. It has been wonderful getting to know you and I'm thrilled that you were not only able to attend UKSG because of your Merriman Award but also that you were willing to share with me and our fellow NASIG members what it was like. Congratulations once again!

Report on the 2010 NASIG Award Winners

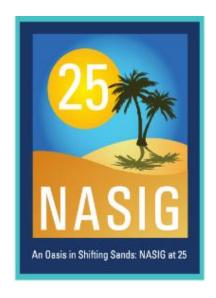
Chris Brady, Awards & Recognition Chair and Jessica Ireland, Awards & Recognition Vice Chair

Award winners' survey conducted by Beth Weston; Photographs by Angela Dresselhaus.

For the conference this year in Palm Springs, the Awards & Recognition Committee was pleased to offer the following awards: six Student Award grants, one Horizon Award (for new serials professionals), one Fritz Schwarz Serials Education Scholarship, one Marcia Tuttle International Grant (for a research/scholarly project of an international nature in serials), one Serials Specialist Award (for paraprofessionals), and one Rose Robischon Serials Scholarship (for professionals with demonstrated financial need to attend the annual conference). In celebration of NASIG's 25th Anniversary, the committee also offered one special Champion Award recognizing the impact, contributions, and leadership an individual has made for the serials profession.

First row: Sarah Razer Callahan, Ivey Glendon, Selden Durgom Lamoureux; **Second row**: Susan Davis, Char Simser, Ning Han; **Third row**: Pam

Cipkowski, Janet Bassett, Zach Coble Fourth row: Richard Rybak ,Angela Black, Jennifer Sauer, Jessica Lewis



Champion Award, sponsored by Serials Solutions:

Susan Davis, SUNY University at Buffalo



John Merriman Joint NASIG/UKSG Award, sponsored by Taylor & Francis:

Selden Durgom Lamoureux, North Carolina State University (NASIG)

Mitchell Dunkley, De Montfort University (UKSG)



Rose Robischon Scholarship, sponsored by Swets:

Pam Cipkowski, Loyola University of Chicago Law School



Fritz Schwartz Serials Education Scholarship: Ivey Glendon, Florida State University



Horizon Award:

Jennifer Sauer, Fort Hays State University



Serials Specialist Award:

Janet Bassett, Salem Public Library (Oregon)



Marcia Tuttle International Award:

Charlene Simser, Kansas State University





NASIG Conference Student Grant:

Zach Coble, University of Missouri-Columbia Ning Han, Louisiana State University Sarah Razer Carnahan, Texas Woman's University Richard Rybak, Dominican University Angela Black, Florida State University Jessica Lewis, SUNY University at Buffalo



Richard Rybak, Sarah Razer Camahan, Angela Black, Zach Coble, Jessica Lewis, Ning Han

One requirement of the student awards is to provide feedback about the conference experience. Below is a selection of their responses to the A&R committee's questionnaire. We received a very positive response overall for the awards and the conference. There are also some very insightful perspectives given on the state of our profession.

Why do you feel it is worthwhile for newcomers to the field of serials to attend a NASIG conference?

 As a newcomer, attending the NASIG conference was worthwhile because of the opportunity to meet and network with colleagues as well as to learn about peoples' experiences with solving problems related to serials work. I appreciated the

- This conference is a great opportunity for newcomers to the field due to the welcoming, nonintimidating nature of the conference, but also due to the relationship the conference has with vendors and the heavy discussions on costs of services, etc.
 I think it is possible that those in library school or those new to the field do not have real opportunities to engage these issues, and I was pleased to see the vendor-client discourse present at the conference.
- Serials are changing all the time, not only print, but also electronic resources. New trends and issues with both print and electronic serials are emerging at every moment, which makes very hard for newcomers to keep track of everything. NASIG provides a great platform that serves this need. It also offers a great opportunity for newcomers to network with other serials or electronic resource librarians. I really enjoyed my first NASIG

experience. It definitely a great conference tailored for people, both professional librarians and SLIS students who work with serials publications.

How did attending the conference benefit you personally?

- I got to network with other professionals in the industry, and hear about some of the current events going on in the field. I was able to present back to my library these experiences and represent my state and institution in a good light.
- I personally benefitted from the conference due to the fact that most of the emphasis in the sessions was on print and electronic journals – something I know little to nothing about. Since I work primarily with digital newspapers and newspapers on microfilm, the entire conference was a crash-course for me on the world of print and electronic serials; I went back to my job understanding much more the conversations that were going on regarding this area, and for this reason I feel grateful that I was able to attend the conference.
- This was my very first NASIG experience and I enjoyed it a lot. It benefited me in so many ways and it would be very hard for me to name them all. But, I do want to share some great experiences that this conference brought me: 1) Networking; I met many excellent and experienced people who have worked with serials for years. I even met the author of a book I've read recently. Most importantly, they not only shared their expert knowledge and insights in serials, but also gave me helpful guidance in professional development and career decision making. By chatting with them, I discovered that there were many other career options available. 2) Knowledge enhancement; I enjoyed most of the sessions offered by NASIG. They all touched those most current and highly debated topics which enhanced my knowledge in serials, as well as increased my interests in this field. Most of the sessions offered me "real" food for thought and I really enjoyed them.
- NASIG was the first national conference that I attended, and I enjoyed talking to librarians from around the country (and hemisphere!) about the issues they face in their libraries. I benefited from the "professional retreat" that the conference provided, where the sessions and networking allowed me to explore ideas I've had and to develop

new ones about serials work and librarianship in general.

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

- I actually got a job offer for a serials librarian position before I attended NASIG. Before that, I worked at a cataloging department in an academic library for almost two years. I knew that serials publication and electronic resources is a black hole, but I really want to dig it on my own to see how deep the hole is. I already had very strong interests in serials even before I attended NASIG. But after attending the conference, my desire to dig into the black hole is even stronger. Besides print serials, I got to know more about electronic serials by attending this conference. I think in the future I will pay more attention to that for my research.
- The NASIG conference reemphasized the importance of serials in academic libraries, and particularly electronic serials. Sessions such as Sara Sutton's Core Competencies for Electronic Resources Librarians gave me an idea of the skills I need to possess upon graduating to be competitive in the job market.
- My experience at the conference made me reconsider seeking a career in serials. To be honest, most of the people I talked to seemed very frustrated with the profession. Burnout was high, as most who had been there long enough were just waiting to retire. The other professionals, the younger ones, were waiting for the others to retire before they could implement the changes they wanted. There's a lot of generational friction in this field, and I think that's because it's changing so rapidly. But the prevailing sentiment, honestly, was that it was only going to get worse for serials professionals. As publishers raise their prices, collections are being downsized and so are staff. People are doing more with less. The future looks bleak, to be honest. And though e-resource librarians are being hired, they seem to be saddled with a whole host of duties that they themselves don't understand. A lot of the new professionals seemed to say, "I'm not really sure what it is I'm supposed to do. Half the time I feel like they expect me to be a rocket scientist; the other half of the time, I am little more than a trained monkey." I feel the same way now at my current job, and it looks

- like being a professional probably won't change that. I've been in serials for six years, and I've never seen so much pessimism and bitterness. So, maybe I should go into reference or something instead.
- I don't think the conference has influenced my career plans in a specific way (i.e., looking for a job as a serials cataloger), but attending the conference has influenced me to seek out other library conference opportunities in order to meet others in the field.

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

- Nothing, it was awesome. Thank you so much for doing this. I had a blast.
- I don't really know. I had a great time and met a lot of cool people.
- My conference experience was very enjoyable.
 From the beginning, at the First-Timers/Mentoring Reception, I felt welcome and comfortable (except for the heat!).
- I think NASIG has already done a wonderful job in assuring award winners a pleasant conference experience. Personally, I love the place we stayed and the food we had. The Awards & Recognition Committee did a great job in helping me book my flight and other requests. I especially like the breakfast event that was held on Sunday morning. It would be even greater if we could have a small dinner or meeting session for all award winners. I also enjoyed the first timers session and award recognition session. Everything just went so smooth and I enjoyed a lot.

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

 Everything seemed to be fairly good for me this time, from both an award winner and a conference attendee perspective. I think I will stay with NASIG and try to volunteer for some projects next time. I probably will have some suggestions or comments to make by then. Telling folks where the CVS pharmacy was located would've been a good idea.

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

- Serialslistserv.
- I learned of the NASIG awards through a listserv email circulated by the LIS School at Florida State University.
- I learned about NASIG from my supervisor at work, who is a very active NASIG member.
- University of Missouri's LIS listserv.

Where should NASIG be promoting awards?

- Library schools. I heard nothing from my college and figured they would want their students to win grants and attend conferences while they are still students. Chances dwindle once you start being a librarian and people expect your institution to pay. But few libraries have money for travel anymore, at least the academic ones.
- I was somewhat surprised to find that NASIG's
 Facebook group isn't as active as I thought it would
 be (many of the wall posts are well over a year old).
 Additionally, I would recommend converting from a
 group to a fan page so that its updates will show up
 in its followers friend feed that way NASIG would
 have an ongoing, active presence and could easily
 promote awards.
- Library and Information Schools. Many SLIS students actually are interested in serials work and electronic resources, but there only are very few related courses available through most SLIS programs. I think it is a good place for NASIG to promote all the awards, especially the student grant. Students definitely want to take the advantages to learn things they can never get from the program they are in.
- I think LIS schools' listservs would be pretty effective. ALA has a student member blog: http://www.americanlibrariesmagazine.org/student-member-blog

Minutes for the 2010 Conference Business Meeting & Brainstorming Session

Rancho Las Palmas Hotel, Palm Springs, California

Friday, June 4, 2010

Carol Ann Borchert, Secretary Linda Griffin, Parliamentarian and Brainstorming Session Facilitator

Call to Order

The meeting was called to order at 4:04 PM.

Highlights from the Past Year Presented by Rick Anderson

Anderson reported a 25 percent increase in sponsorship thanks to the efforts of Jill Emery and many others who helped our past president in this effort. Anderson expressed his gratitude for the hard work of all of the NASIG committees and task forces this year, particularly the 25th Anniversary Task Force and their planning of special events in honor of our anniversary.

The NASIG Bylaws were changed this year in order to permit a new category of memberships for organizations.

NASIG and UKSG awarded the first Merriman Awards this year, which provides funding for one NASIG member to attend UKSG, and one UKSG member to attend NASIG. Despite travel problems in returning to the United States for the NASIG member, Selden Lamoureux, we believe that the award provided a net benefit for both organizations.

The NASIG *Newsletter* will soon be moving to an open access model, hosted by Utah State University on the bepress platform. This will facilitate management of the PDF version of the *Newsletter*.

The continuing Executive Board members and Committee Chairs participated in a day-long

contingency planning session on Wednesday, June 2, facilitated by Mark Lane. This is a continuation of the strategic planning cycle that NASIG began in 1990. Results will be shared with the membership once the Board has received the final report and has a chance to assimilate it.

The NASIG Annual Conference will be held in St. Louis, Missouri for 2011.

Secretary's Report Presented by Carol Ann Borchert

The NASIG Executive Board has approved a new volunteer position of NASIG Historian. This will be a separate position from the Archivist, but will also have the NASIG Secretary as their Board Liaison. The NASIG Historian will help to select photos to be archived in an electronic form, to possibly be printed, and also stored in the Archives. This will facilitate the efforts of future anniversary celebrations.

There will also be new positions on the Financial Development and *Newsletter* committees pertaining to advertising in the NASIG *Newsletter*. The FDC position will obtain advertisements and the *Newsletter* position will help with layout.

The Board voted to change the name of the Library School Outreach Committee to the Student Outreach Committee. Many students are no longer attending a "library school" so the new committee name better encompasses the mission and reflects more current terminology.

Treasurer's Report Presented by Peter Whiting

Whiting reports that we have \$412,520.26 in the NASIG checking account, and \$51,336.18 in the Charles Schwab account. We will be moving the Schwab money from cash to a money market account.

The NASIG committees are on track with expenses and we have received \$168 in personal donations to NASIG. The Conference budget is in good shape, in part due to organizational sponsorships.

Introduction to the 2010-2011 Board Presented by June Garner & Eleanor Cook (N&E Co-Chairs)

Garner and Cook thanked everyone who agreed to stand for nomination and review for the NASIG elections. They introduced the 2010-2011 NASIG Executive Board, beginning with the continuing members, then the incoming members:

- Rick Anderson, Past President
- Katy Ginanni, President
- Carol Ann Borchert, Secretary
- Lisa Blackwell, Treasurer
- Patrick Carr, Member-At-Large
- Steve Kelley, Member-At-Large
- Christine Stamison, Member-At-Large
- Steve Shadle, Vice President/President-Elect
- Clint Chamberlain, Member-At-Large
- Buddy Pennington, Member-At-Large
- Jenni Wilson, Member-At-Large

Please remember to nominate folks for next year's elections!

Recognition of Outgoing Board Members and Committee Chairs Presented by Carol Ficken and Chris Brady (A&R Co-Chairs)

Ficken and Brady wish to recognize the work of the following outgoing Board members and Committee Chairs:

- 25th Anniversary Task Force, Tina Feick and Theresa Malinowski
- Archivist, Sheryl Williams
- Bylaws, Elizabeth Parang
- Conference Planning, Cory Tucker and Mike Markwith
- Conference Proceedings, Allyson Zellner
- Database & Directory, Bob Persing
- Evaluation & Assessment, Anne Fath
- Financial Development, Zac Rolnik
- Library School Outreach Committee, Kara Killough
- Membership Development, Alice Rhoades
- Mentoring, Dana Walker
- Newsletter, Kathryn Wesley
- Nominations & Elections, June Garner
- Program Planning, Morag Boyd

- Publicist & Public Relations, William Joseph Thomas
- Awards & Recognition, Carol Ficken
- Past President, Jill Emery
- Member-At-Large, Bob Boissy
- Treasurer, Peter Whiting
- Member-At-Large, Virginia Taffurelli
- Member-At-Large, Sarah George Wessel
- President, Rick Anderson

Discussion of Old Business Presented by Linda Griffin, Parliamentarian

There was no old business.

Call for New Business Presented by Linda Griffin, Parliamentarian

There was no new business.

Susan Davis made a motion to adjourn, seconded by Jessica Ireland. The Business Meeting adjourned at 4:25 PM and immediately moved into the Brainstorming Session.

Brainstorming Session

Beth Ashmore presented results from the recent Electronic Communications Survey, requesting feedback about how well NASIG is communicating with its members and how such communication could be improved.

There were 223 survey respondents, which represents a 30 percent response rate from the membership.

Ashmore expressed thanks to Tim Hagan and Tonia Graves for their work putting the survey together.

Based on the survey results, the NASIG email blasts and *Newsletter* are currently the most preferred methods of receiving information. Many people preferred to conduct discussions via the listserv that is not currently in use.

Of the respondents, 54 percent feel that they are mostly or fully informed, with 37 percent feeling they are adequately informed. As Ashmore noted, however,

no one wants to be "just adequate." Some themes emerged from the open-ended comments section, including: 1) focus on push technology, 2) use of Web 2.0 and social networking technologies, 3) there are too many channels of communication, and 4) a need for balance.

The floor was then opened to discuss what ideas members had for tackling our organizational communication issues. Comments included:

- Don't add more time-intensive things to the job we already have with NASIG. We are all volunteers with other full-time jobs.
- Love the discussion at conference and would love to see that outside of the conference as well. Maybe this could focus on some of the conference topics in an asynchronous way, but not sure what technology would be needed for that.
- NASIG-L was limited to NASIG topics, such as conference locations and feedback. We have discussion forums, but they are sometimes frustrating to use and it's difficult to back out of them and continue to navigate the NASIG site.
- We need a single discussion place that is easier to access and manage the time spent on it.
- One member said that he left NASIG because the emails were too much. He wants to discuss library issues. Email can be good, depending on how it is used.
- The content of the conference is one topic of organizational communication, and details of how to handle NASIG business is another. Need the information pushed; no time to go find discussions.
- One suggestion for a session at the next conference would be how to be good users of electronic media, such as managing and following blogs, etc.
- We need to be able to reach the next generation.
 How do we bring NASIG back to the forefront of
 communication as we were when NASIG was a
 young organization? Maybe a new technology task
 force to look at this? Might help draw in new
 membership.
- We need to utilize the tools we have in the right way.
- Maybe we need to consider a name change. Many places don't have so much serials work going on anymore. We need to utilize what we do well.

- Or maybe NASIG should be a name and not an acronym.
- We need to engage the membership in a discussion about the future of NASIG and a possible name change.
- We need to engage those who are not members as well.
- Does the name NASIG even represent what we are anymore?
- Examine what we want to convey to NASIG members and non-members. Pay attention to how we are communicating and to whom.

The Brainstorming session ended at 5:10 PM.

Submitted by

Carol Ann Borchert, NASIG Secretary June 7, 2010

Minutes approved by NASIG Executive Board July 23, 2010.

NASIG Executive Board Wrap-up Notes

Place: Rancho Las Palmas Hotel, Palm Springs, California

Attending:

Rick Anderson, President
Katy Ginanni, Vice President/President-Elect
Jill Emery, Past President
Carol Ann Borchert, Secretary
Lisa Blackwell, Treasurer-Elect

Members-At-Large:

Bob Boissy
Patrick Carr
Steve Kelley
Christine Stamison
Virginia Taffurelli
Sarah George Wessel

Ex Officio:

Kathryn Wesley

Guests:

Steve Shadle, incoming Vice President
Clint Chamberlain, incoming Member-At-Large
Buddy Pennington, incoming Member-At-Large
Jenni Wilson, incoming Member-At-Large
Joyce Tenney, Site Selection
Angela Dresselhaus, incoming Ex-Officio

Regrets:

Peter Whiting, Treasurer

Session Feedback and Suggestions

Two heavily attended sessions noted were the e-books and OCLC research, each with close to or over 100 people.

Panelists need to minimize time giving background of organization when their time is limited to start with, except when relevant to topic. PPC could add to list of speaker resources about giving a good presentation.

There were a couple of sessions from vendors that turned into sales sessions. Maybe it is time to just let folks present what they want? Attendees can leave and go to a different session if they don't want to listen to it. Keep the no disparaging policy.

Should we do another speed dating session? The session at a previous conference was very popular, but we figured vendor expo would replace it. Do we want to have both? The speed dating session only reached about 75 people versus the vendor expo, which reached a much broader audience.

The suggestion arose that we might eventually want to do away with the conference program tracks.

Regarding the vendor presentation issue, we could try a track of product services as an experiment and see how it works.

Vendor Expo

The Vendor Expo generated overwhelmingly positive feedback, except one or two persons. Emery will be following up with vendors for their feedback.

Awards

When awards were handed out, sponsors for the awards were not mentioned, nor were they in the brochure about the awards. This needs to be corrected for next year.

The Merriman Award was awarded to two people (one NASIG and one UKSG), but we only acknowledged the NASIG half. Anderson reported that was done at the UKSG award recipient's request.

When announcing the Rose Robischon award winner, we need better euphemism for them when we publicly announce, rather than saying that they don't have any money. We don't need to change the award description, but the wording on the announcement at the conference should be changed.

Business Meeting & Brainstorming Session

During the "Meet the Board" section of business meeting, Board members should line up so folks can see us.

There was some feedback from the brainstorming session about not staying on topic, since we strayed from the original topic. Some folks felt that we should have stayed with the original topic; others were glad the NASIG name issue came up and was discussed.

The Board needs to revise the invitation to the parliamentarian to make requirements more clear. Do we need to continue to have a specific brainstorming topic if we're rolling it in with the business meeting? Or explain very clearly that new business is a time to discuss anything on one's mind? Should we separate parliamentarian duties from brainstorming session

facilitator? Should we send a call for old and new business before the meeting to add to the agenda?

Communication

Non-member registrants were not receiving the conference blasts; they only received one message. CPC and PPC manuals should be updated to make sure non-member registrants are included in all conference communication. ECC has already added information to wiki regarding sending blasts to registrants, including non-members.

There was an issue of a tweet that was derogatory toward an individual from the conference. The Board does not wish to censor communication about the conference, but we would like to remind people to be respectful and civil, particularly in public discussions, whether live or virtual. Board members will mull this issue and discuss in a future board meeting.

A question arose if we should have a social networking task force. ECC might already find this within their purview, but if they feel we need separate task force, we could appoint one. As for the task force on new technologies, it should evolve naturally. These technologies are really bottom up not top down.

Do we need more reminders about the committee meetings? This should not come from Board liaisons, but rather from committee chairs; the meeting is for the incoming committee.

It is okay to announce Nashville in 2012; contracts are signed. Announce that we are considering a Canadian location in the next 3-5 years and to get passports, etc. So far, we haven't quite been able to get conference room rate that we need from some Canadian locations.

Speaker Travel Arrangements

PPC travel arrangements will need to match reimbursement policy. Generally, if there are things in the manual that they don't do, they need to be removed at discretion of the committee. We need to review the reimbursement policy in light of current airfares and methods of booking flights.

Future Possibilities and Projects

There is the possibility of co-sponsoring a session with ER&L at their conference and ours. This would be a marketing opportunity for both ER&L and NASIG. We could capture one ER&L program and brand it, broadcast as a streaming file, send it to listservs, and add it to the NASIG site. Then ER&L would do the reverse with a NASIG program. ER&L can bring the technology to St. Louis for us.

The topic of the NASIG internship came up. This could be a spring program to help a committee with a project. The Board would agree on the project at the fall board meeting. More details will be forthcoming to the Board in a formal proposal. The intern will need to have a mentor assigned. Internship will need to be assigned before other awards. We will need to advertise heavily with schools, with the project finalized by the end of summer and awarded by November so they can register for credit. SOC will develop this and let A&R do the administration. We need a project list from committees by the end of summer, and the Board can review. Also, we should have a mechanism for students to propose ideas as well, such as student award winners who have some familiarity with NASIG. Review the job description for the administrative assistant position to see if Board wants to submit a proposal. We can substitute one of the student grant awards with the internship. If there are two interns, there would be two fewer student grants that year. Same financial benefit at conference would apply to both. Maybe have them do a poster session on their experience?

Submitted by: Carol Ann Borchert NASIG Secretary June 14, 2010

Minutes approved by NASIG Executive Board July 23, 2010.

2010 Conference Evaluation Report An Oasis in Shifting Sands: NASIG at 25 June 3-6, 2010

Submitted by:

2010 Evaluation & Assessment Committee
Janice Lindquist (Chair), Smita Joshipura (Vice Chair),
Barbara McArthur, Virginia Rumph, Christine Torbert

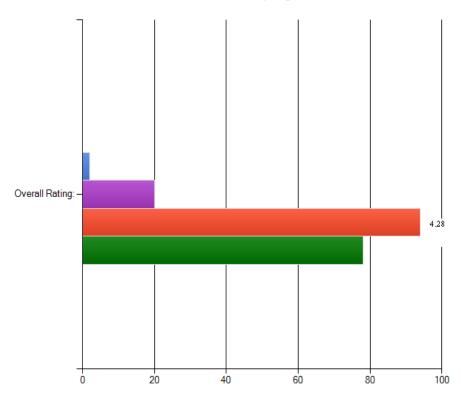
NASIG's 25th annual conference was held in Palm Springs, California. The conference featured one preconference, three vision sessions, ten strategy sessions, sixteen tactics sessions, and five poster sessions. Other events included an opening reception at the Rancho Las Palmas Resort as well as the 25th anniversary dinner and dance. It should be noted that a new event was featured at this conference, a vendor expo.

This year, 260 of the 383 conference attendees completed the online evaluation form. This 68% response rate reflects an increase of 14% from last year's response rate of 54%. This was the third year that the evaluations forms were available online. A PDF of the survey was also provided on the NASIG website for attendees to use during the conference. Those who completed the evaluation form were also eligible to enter a drawing for a free conference registration. The winner will be announced in the NASIG Newsletter.

Conference Rating

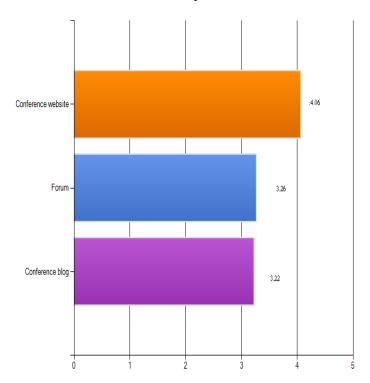
Respondents were asked to give ratings on a scale of 1 to 5, with 5 being the highest rating. The overall rating for the 2010 conference was 4.28 which is similar to last year's conference which rated 4.31 overall.

Considered as a whole, how would you rate the 25th annual NASIG conference in Palm Springs?

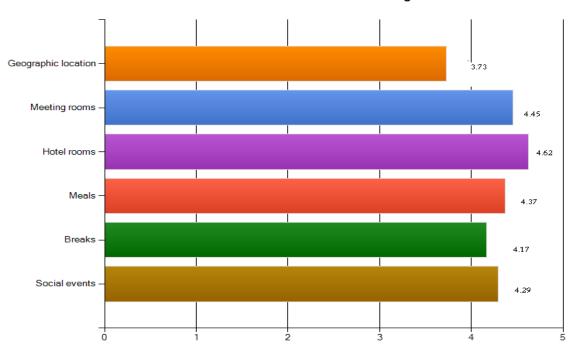


One to five rating scale.

Please evaluate the usefulness and overall design of the online conference information:



Please evaluate conference facilities and local arrangements:



Ratings for the facilities and local arrangements were higher than last year in all categories except for geographic location. The Asheville conference was rated 4.35 but the Palm Springs conference was rated at 3.73. There were multiple comments about the heat as well as the distance and/or difficulty of travelling to Palm Springs which might account for the lower rating. Still, despite the negative factors, the Palm Springs conference site was rated higher than the ones in Phoenix (4.15) or Louisville (4.18).

The meeting rooms (4.45) and hotel rooms (4.62) received somewhat higher ratings than last year. There were multiple comments praising the hotel, service at the resort, and the centralized location of meeting rooms. There were multiple positive comments in regard to the free wireless and the internet café.

The meals (4.37) and breaks (4.17) also rated slightly higher this year. Negative comments were in regards to the number of meals served outdoors and some attendees missed having more group meals, or at least more structured opportunities for group meals such as the dine-arounds.

Social events (4.29) were also rated higher than Asheville (4.18). Attendees expressed gratitude for the hard work of CPC, PPC, and the 25th Anniversary Committee. There were several requests to bring back the late night socials and to continue to provide opportunities for dancing.

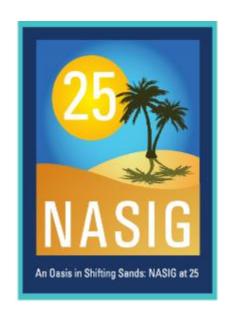
Other conference information, including the conference web site (4.06), forum (3.26) and conference blog (3.22) were rated lower than last year at 4.2, 3.78 and 3.77. There were several comments wishing information was more centralized. One suggested sending direct emails whenever something new was added to the site. Some wished there was more detailed information on the programs prior to registration. Several said they did not use the blog and/or forum.

NASIG again used an online store (Café Press) for conference souvenirs. Most respondents (66.1%) have not visited the store or have no opinion. Those who are happy with the selection came in at 32.8% and those who are not at 1.1%. Some indicated that they would prefer a wider variety of shirt colors and some said they might buy souvenirs on site but didn't think about going to the online store.

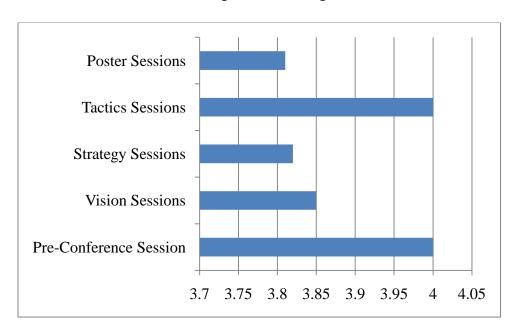
Program

The program followed a "no-repeat" format where most sessions were not repeated. Of those who commented on this aspect of the program, several asked for at least some sessions to be offered more than once. Another theme in the comments was that too often there were multiple programs of interest being offered at the same time. One respondent suggested a pre-conference survey to determine interest in the various programs.

Respondents were also asked about the balance in the types of programs offered. This aspect rated 4.02 which is slightly higher than Asheville (3.96) and tied with Phoenix. Again, as in last year's results, the largest complaint about the balance of the program was the perceived lack of cataloging/metadata-related sessions.



Average Session Ratings



This year the conference featured three vision sessions. Eric Miller's "Linked Data and Libraries" received a 4.06 rating. Kent Anderson's presentation, "How the Internet Changes Publications in Society" received a 4.28 rating. The final session was a panel discussion "Serials Management in the Next-Generation Library Environment" which received a 3.21 rating. There were multiple comments about the several last minute substitutions among the panelists. The average rating for vision sessions this year was 3.85, down from last year's 4.27.

The ten strategy sessions this year generated ratings from 3.43 to 4.08 with an average rating of 4.0. The highest rating was given to Roger C. Schonfeld's presentation, "What to Withdraw? Grappling with Print Collections Management in the Wake of Digitization", with 4.08. Two other sessions were rated above 4.0, Stephanie Krueger and Tammy S. Sugarman's session "Evaluating Usage of Non-Text Resources: What the COUNTER Statistics Don't Tell you" (4.02) and Sarah Glasser's program "When Jobs Disappear: the Staffing Implications of the Elimination of Print Serials Management Tasks" (4.01).

There were sixteen tactics sessions offered in Palm Springs. Ratings ranged from 3.26 to 4.36 with an

average of 4.0. Nine sessions scored above 4.0. Two sessions tied at 4.36 for the highest rating, Steve Shadle's "What Can the Cataloger do with an ERM" and Jason Price's "Making E-Serials Holdings Data Transferable-Applying the KBART Recommended Practice."

Five poster sessions were presented this year. Ratings ranged from 3.58 to 4.04, averaging 3.81. Meggan Curran's "Avoiding Obsolescence: A Professional Development Plan for Print Serials Staffers" received the highest rating.

There was one pre-conference offered this year, Magda El-Sherbini's "Resource Description and Access "RDA": New Code for Cataloging" which received a 4.0 rating.

Other Conference Events

User Group Meetings	4.16
Informal Discussion Groups	4.26
First-Timers Mentoring Reception	3.94
Brainstorming Session	3.65
Business Meeting	3.77
Vendor Expo	4.12

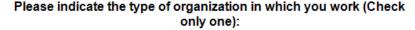
Both the user group meetings and the informal discussion groups rated higher this year. User groups were rated at 4.16 this year, in comparison they were rated 3.80 in Asheville. The discussion groups rated 4.26 this year as opposed to 4.10 last year. There were several requests asking that the discussion groups and user groups not be scheduled during the same time.

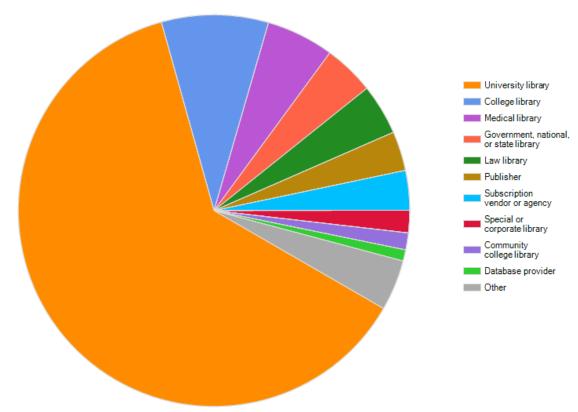
The First-Timers/Mentoring Reception rated a 3.94 down from 4.20 in 2009, but 87.7% of respondents favored continuing this event in the future. The Brainstorming session received a rating of 3.65 (3.74)

last year). Seventy percent of respondents would prefer to continue this event in the future. The most common suggestion would like to see this session better moderated or structured to keep the discussion on topic. The Vendor Expo was rated at 4.12. The majority of the written comments were in support of continuing this event. However, there were multiple comments about the timing of the event as not all conference attendees arrived early enough to attend the Expo.

Respondent Demographics

Respondents by Organization type





Academic library employees continue to represent the largest group of respondents (72.5%). This includes university (134), college (19), and community college (3) librarians. Responses from the vendor and publisher community, including subscription agents (7), publishers

(7), database providers (2), and automated systems vendors (1) comprised 8% of the total respondents, up slightly from last year's 7.5%. Attendees from specialized libraries, including medical (12), law (9), and special or corporate libraries (4) made up 11.7% of

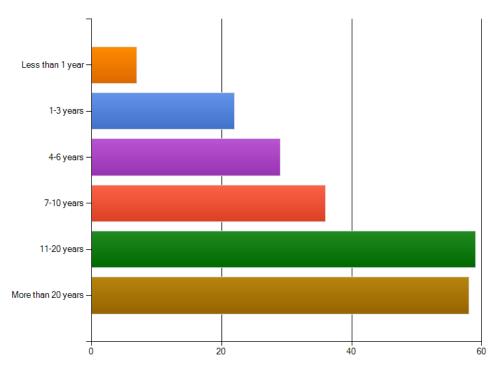
respondents. Other types of institutions included government, national or state libraries (4.2%); public libraries (.9%), students (3.3%), library network, consortium, or utility (.5%), professional association (0.5); and those selecting "other" (0.9%).

Respondents were asked to describe their work, selecting more than one category as applicable. The largest respondent groups identified themselves as serials librarians (49.5%), electronic resources librarians

(42.5%), acquisitions librarians (27.1%), and catalog/metadata librarians (26.2%). Collection development librarians comprised 15.9% of respondents, licensing rights managers (13.6%), technical service managers (14.5%). Reference librarians comprised 13.1% of the respondents. All other categories were selected by less than 10% of respondents.

Respondents by Years of Experience

Please indicate your years of serials-related experience:

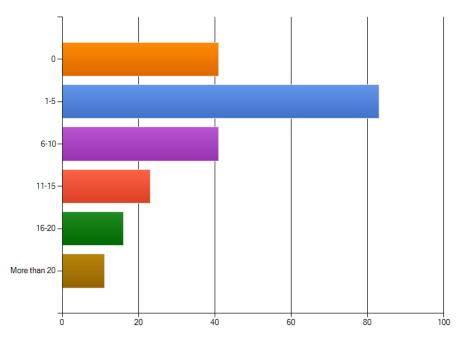


When asked for the amount of serials-related experience, the majority of respondents are in the 11-20 years (28%) or more than 20 years (27.5%) categories. Those with 10 or less years experience comprise 44.5% of the respondents, including those with less than one year (3.3%), 1-3 years (10.4%), 4-6 years (13.7%), and 7-10 years (17.1%).



Respondents by Number of NASIG Conferences Attended





Most respondents were repeat NASIG attendees: 38.6% of respondents had attended 1-5 previous conferences, 19.1% had attended 6-10, 19.1% were first-timers, 10.7% had attended 11-15, 7.4% had attended 16-20, and 5.1% had attended more than 20.

The Evaluation & Assessment Committee would like to thank everyone who took the time to complete the

online evaluation form. We continue to be impressed each year with the thoughtful comments and suggestions that reflect a strong interest in continuing to improve upon the high quality conference NASIG puts on each year. Your comments and feedback are essential to the success of future NASIG conferences.

Conference Reports

Vision Sessions

<u>Linked Data and Libraries</u>

<u>Publishing 2.0</u>

<u>Serials Management in the Next-Generation</u>

<u>Library Environment</u>

Strategy Sessions

<u>Digital Preservation</u>

Not for the Faint of Heart

It's Time to Join Forces

What Counts?

When Jobs Disappear

CONSER Update

ERMs and Impact on Technical Services What to Withdraw?

Tactics Sessions

Core Competencies for ER Librarians
Integrating Usage Statistics into Collection
Development Decisions
Oasis or Quicksand
Shelf-Ready?
What Can the Cataloger Do with an ERM?
Can't We Write a Little Script for This?

Industry Initiatives
Let the Patron Drive
Licensing Electronic Journals through NonSubscription-Agent "Go-Betweens"
Beyond Lists and Guides
One Identifier
Knowledge Bases and Related Tools
Metadata Value Chain for Open Access

Vision Sessions

Linked Data and Libraries

Eric Miller, Zepheira, LCC

Reported by Mary Bailey



Eric Miller describes linked data as the "next phase of the web." When asked what it is, he says the answer is the same as early descriptions of the web: "vague but exciting." In a fascinating presentation, Miller shared a vision of using the web to manage open data around which anyone can build other features. His vision is about collaborating and sharing the content that already exists.

After providing some historical background, Miller shared that some websites such as <u>BBC</u>, <u>NPR</u> and <u>data.gov</u> are already making their content available for others to remix and deliver in new ways. The premise is that the data never leaves its location, but anyone using that data can build applications, to provide new ways of

viewing or creating new meaning from the data. The focus is on generating good content and letting someone else frame it.

Digital preservation repositories are another area where discussion is taking place about opening up data so users can remix it to meet their needs. Doing so will require new ways of cataloging, archiving and supplying content. Linked data allows users to select only what they are interested in and use it in new ways that originators of the data may never have considered.

Miller's premise is that libraries already have data. Since librarians organize data, and understand tagging, identifiers, and control points, they are the ideal group to work with linked data. By exposing the raw data in linked data platforms and creating identifiers, a primary key URL is created that becomes a persistent identification or control point. So far, no one group is willing to trust another's control points, but Miller believes the obvious group to create a "trusted control point" is librarians. Already a trusted entity, librarians can leverage that trust and get involved from the start.

Discussion is already ongoing with the World Wide Web Consortium (W3C) and librarians need to get involved now. Librarians must make others aware of their ability to work with this product while the field is new and evolving. Linked data can empower users to build a community around data.

Publishing 2.0: How the Internet Changes Publications in Society

Kent Anderson, CEO/Publisher of Journal of Bone and Joint Surgery

Reported by Mary Ellen Kenreich

Anderson began this informative, thought provoking and entertaining session by talking about how medicine has evolved. To illustrate the primitive beginnings of medical practice, Anderson shared a story of a common treatment for influenza in 1837, application of leeches to the patient's chest. Around the same time the

medical journal was established as a professional correspondence instrument. While medicine continued to evolve, the journal hadn't changed much, until recently. Traditionally, the journal consisted of a combination of text and line art to be read under reflected light. Now the journal has taken a more abstract form, including videos, online forums and other ways of communicating. Traditionally producers controlled the flow of information and readers simply consumed the product. With the advent of Web 2.0, consumers have access to the same publishing tools as the producers.

Television shows could create groups with a shared experience, but without the internet, could not support conversations. The Internet creates both groups and conversation. Web 2.0 brings people together online and has implications for the evolution of publishing. As people become accustomed to forming groups and conversations online, they will expect the same experience from scholarly information.

Information and access have the potential to replace the scarcity economy. When there is no scarcity, you replace hierarchy with heterarchy. Anderson talked about the term "apomediation" and how a scarce economy requires "intermediaries." In an abundant economy we need guides, or apomediaries. Anderson asked, "What is an apomediary? If you have written an Amazon review, you are an apomediary." As an apomediary, you are a source of information or opinion. The web allows your information/opinion to get directly to the people who want it.

Anderson used the following five movies as metaphors to describe what is shaping the future of Publishing 2.0. Look Who's Talking points out how producer and consumer roles in the information chain are equalizing. Users have just as much to say producers. Reservoir Blogs reminds us to rethink our biases against blogs. Since the mainstream media cannot always report everything we find interesting we need blogs to broaden our access to information. Toy Story illustrates that we are in the age of toys, devices, and various media tools. For the first time in history, consumers

own the infrastructure. *The Matrix* highlights the emergence of the real-time web and publishers must be there. *Transformers* reflects the change in media from sources of information to sites of coordination. Our audiences expect digital, immediate information, and mobile connectivity. We need to follow our customers and ask if we are where they are daily.

There were several interesting questions from the floor. When asked about the future of the book, Anderson commented that he supports serialization of fiction. He said he likes e-book readers, and that there are environmental incentives to stop reading books made of paper. He was asked how long before New England Journal of Medicine and Journal of Bone and Joint Surgery will be solely online. Anderson replied that print drives awareness, but most journals will be online in the near future. He says the "article container" (the PDF) and the layout process is useful. But he also said the periodical release of print would change. When asked how he establishes pricing, Anderson answered, "What the market will bear," and added that pricing is full of compromises. It is a fact of economic life that you treat your best customers the worst, and your loyal customers don't object. Someone asked if we are headed toward an epidemic of Attention Deficit Disorder. Anderson referred to an article written in 1867 that complained about the overload of information and said we need good products and filters to control information.

Serials Management in the Next-Generation Library Environment

Robert McDonald, Indiana University Jonathan Blackburn, OCLC Bob McQuillan, Innovative Interfaces Inc.

Reported by Amy Carlson

Libraries rely heavily on their integrated library systems (ILS) and separate software and services to purchase, track, and activate a variety of materials for their users. With decreasing budgets and increasing accountability, the need for data both drives and inhibits libraries.

Jonathan Blackburn, Robert McDonald and Bob McQuillan addressed their visions of the next-generation library systems and services; highlighting both the needs exposed today in libraries and the current innovations setting the groundwork for the future.

The workflow complexity necessitated by budgets and the increased need for data requires a more flexible set of systems. McDonald suggested that we might see a more flexible, unbundled ILS. Blackburn and McQuillan echoed that strategy, describing the changing nature of workflows and the need for interoperability to reveal a clearer view of the big picture. Cloud computing could provide a shared infrastructure and promote sharing and cooperation. While the notion of working "in the cloud" may seem foreign to some libraries, McQuillan pointed out that the trend has already begun for even the traditional ILS in bibliographic coverage metadata services, consortia, and shared catalogs.

How will the challenges of today help to shape the future systems and services in relation to serials management?

All of the panelists addressed difficulties in workflows and the tensions produced by integrating traditional print workflows with the ones necessitated by electronic products. Many people participate in making decisions on how to process or use these resources. Librarians must piece together disparate information from a variety of systems in order to make effective decisions. Greater flexibility in these systems and a more holistic approach to the process could provide libraries with the data required for decision-making. With more flexible systems and service components, libraries can integrate data into other places such as, learning management systems or university enterprise systems.

Interoperability would promote efficiencies in workflow. Eliminating the need to re-key information and aggregating information from different systems would assist in analyzing and reporting. Reporting tools that could address both print and electronic formats,

which were traditionally siloed separately, would also help. Workflow is not a linear process. The nextgeneration system should enable a variety of workflows. Blackburn noted that libraries should be working beyond format and focusing on quick delivery of materials. Communication strain, exacerbated by a difficult workflow, slows the library from moving forward. McDonald envisioned a future where different types of software or data components, such as toolkits, will pull together the right information needed by a local community. Libraries could mold these tools to fit the institution. He noted that the cloud offers flexibility and creativity by scaling services, allowing the library to purchase infrastructure on a needs basis. To achieve interoperability, the panelists encouraged participation in setting standards and working with vendors.

Strategy Sessions

Digital Preservation: The Library Perspective

Colin Meddings, Oxford University Press

Reported by Janet Arcand

Colin Meddings discussed the results of a Library survey on digital preservation conducted by Oxford University Press (OUP) in February 2010. A 2008 ALPSP survey of publishers found that a majority believed long term preservation was critical. However, there was some uncertainty about the effectiveness of publisher planning, and a significant number of publishers preferred other groups or institutions to be responsible for this access.

In a 2009 internal report, OUP discovered that none of their current preservation arrangements could fulfill all of the anticipated needs: supply/cessation scenarios, format transfer due to obsolescence, and provisions to supply all of OUP's customers. They decided to survey their library customers to learn their concerns. Although post-cancellation access was specifically described as being outside the scope of the survey, OUP noted that many of the responses were directed to it.

Of the 475 individuals who started the survey, 385 finished it (ranking questions may have been offputting). There were responses from every continent and most library types however, the majority of respondents came from North American and European academic libraries. Although a majority rated the issue as important, less than half felt that their library was taking steps to ensure long-term digital preservation. The most prevalent archival access resources were Portico, locally loaded content, LOCKSS, CLOCKSS, and OCLC ECO. MetaArchive, HathiTrust, and national libraries were also mentioned. Meddings indicated that most license agreements mentioning perpetual access couldn't guarantee it because they don't specify how access will be granted. He also pointed out that while some responses indicated that print format was used as a preservation method, this would not be feasible for born-digital content.

The conclusions drawn from the survey were that digital preservation is important to customers but significant numbers of libraries are either not taking action or are relying on others to do it. There was some confusion about the issues, but it was clear that cost was more important than any technical issues, and that collaboration among publishers and libraries is preferred. As a result of the survey, OUP will not drop any of the preservation efforts it is currently undertaking. They also plan to conduct follow up interviews to further investigate the issue.

Not for the Faint of Heart: A New Approach to "Serials" Management

Jonathan Blackburn, OCLC Sylvia Lowden, OCLC

Reported by Sanjeet Mann

"If you're faint of heart, this would be a good time to leave," warned Jonathan Blackburn and Sylvia Lowden at the beginning of their strategy session on the nature of serials management. Blackburn and Lowden conducted an ethnographic study of public and academic acquisitions librarians to understand why they

do what they do and to improve the design of the OCLC Web-Scale Acquisitions module. In this session, they presented their findings, invited the audience to critique and expand on their work, and closed with a lively discussion of the serials management trends they had uncovered.

Lowden began with a brief overview of the goals and methods of user-centered design. Karen Holtzblatt's work on rapid contextual design and Indi Young's mental models matrix were particularly influential as Lowden and Blackburn developed their study. They approached acquisitions librarians at eleven public and academic libraries to observe the work environment, document serials workflows, and conduct interviews. They used the data to construct a mental model that would reflect how serials librarians understood their work and their relationships with other stakeholders, such as library users, subscription agents, and vendors.

Blackburn reported that interviewees thought of serials management occurring in four distinct spaces: selection and ordering, negotiation and licensing, receiving and maintaining, and paying and invoicing. Blackburn and Lowden's affinity map envisioned the librarian at the center of a dense web of relationships with stakeholders, each with their own agenda and demands on the librarian. Serials workflows depended on collaboration among these disparate groups, and frequently broke down at one or more "pain points":

- 1. Libraries often lack a single authoritative list of held materials.
- 2. It is unclear who, inside or outside the library, has authority or expertise for various tasks required to start a subscription.
- 3. Expenses vary unpredictably from year to year, forcing libraries to shift funds around.
- 4. Communication between various parties slows the activation of e-journals.
- 5. Catalogs, knowledge bases, discovery layers, etc. each have separate silos of holdings data that must be updated concurrently.
- 6. Payment may involve maintaining and releasing encumbrances.

- 7. Negotiation and licensing can occur before, during or after the monetary transfer.
- Agreed-upon license terms need to be communicated to all stakeholders, including vendors and the user community.

After reviewing this list, Blackburn and Lowden turned the floor over to audience members, who annotated the affinity map and added extra "pain points," including evaluation of e-journal platforms and managing e-books, among others.

Blackburn and Lowden offered concluding thoughts about tracking costs, which many libraries reported as a significant challenge. Whether an item had recurring or one-time costs had more bearing on its perceived difficulty than delivery format (print versus online) or receipt pattern (monographic versus serial). Ideally, ILS products could simplify this type of task by uniting data from disparate sources, allowing serials librarians to do all their work in one place. Currently, however, lack of interoperability often turns timesaving library tools into additional stressors.

In response to an audience question, Blackburn noted that their research had helped OCLC prioritize development on the acquisitions module. This rich contextual information can also help serials librarians face, without faint-heartedness, the daily chaos and be able to describe it to their colleagues.

It's Time to Join Forces: New Approaches and Models that Support Sustainable Scholarship

David Fritsch, JSTOR; Rachel Lee, University of California Press

Reported by Jessica Lewis

Presented by David Fritsch of JSTOR and Rachel Lee of the University of California (UC) Press, this strategy session focused on the relationships JSTOR is building with university presses and societies. The presenters covered how and why the partnerships make sense in the rapidly changing world of publishing, where university and society presses find it difficult to sustain their operations with ever fewer library and individual subscriptions. The presentation focused on the benefits of the partnerships for both not-for-profit organizations and libraries.

Objective of the Program

The objectives of the program from JSTOR's point of view are to enhance partnership with scholarly publishers, implement a shared technology platform that meets the expectations of today's user, ensure long-term access by preserving all content in Portico, and create a business model that helps secure sustainability of smaller presses.

How it Works

JSTOR will manage the licensing, accessing, and maintenance of UC Press's journal collection including current and past issues. UC Press and other participating publishers will no longer accept orders directly from customers or agents; they will manage individual subscriptions only. JSTOR will handle both print and online ordering and access issues. Although subscriptions will be made available only through JSTOR, UC Press will continue to set subscription prices and select, shape, and ensure high quality scholarship in their publications.

JSTOR will be redesigning its platform to accommodate the collaboration, including drastic changes in its interface and re-branding of web pages to reflect the individual publisher.

Benefits to UC Press

UC Press benefits in many ways through partnering with JSTOR, including expanded digital platform functionality, adding multimedia content, increased personalization and features, improved navigation, increased sales both domestic and international, expanded customer service within a larger network, and seamless access to the complete run of a title.

The risks UC Press is taking in establishing this partnership with JSTOR include a potential loss of identity as their titles are merged onto the JSTOR platform, less autonomy in management and development of the platform, and less direct communication with subscribing libraries. Overall, it was argued that the partnership is overwhelmingly beneficial when compared to the potential risks.

Benefits to Libraries

Libraries benefit from this partnership because it allows for transparent pricing and access to more information to fuel discovery, specifically to current content. It will also reduce the number of licenses to be secured and maintained. JSTOR will not add a surcharge to the subscription prices set by UC Press.

While some risks are evident in beginning this partnership, it was clear that both JSTOR and UC Press would benefit from this collaboration, as would library subscribers. They hope to create a model for other university and society presses to follow as they move forward in this program. As of July 1, 2011, JSTOR will be the only place to access UC Press online content.

What Counts? Assessing the Value of Non-Text Resources

Stephanie Krueger, ARTstor, and Tammy S. Sugarman, Georgia State University

Reported by Jennifer O'Brien

Many libraries collect usage statistics, and these numbers are based on a multitude of criteria – provider, price, format, etc. Methods for collecting usage statistics run the gamut from hash marks on graph paper to complicated electronic systems. All are imperfect, and many can be unreliable when it comes to determining true usage. Collecting usage statistics on eresources can represent a significant challenge, particularly when the e-resources are not based on traditional textual formats, such as, monographs and journal articles. While most vendors are equipped to

provide COUNTER statistics, these metrics do not provide a complete picture of usage for electronic multimedia resources.

Usage statistics allow libraries to make informed decisions about purchasing, provide more accountability, and grant librarians some insight into how patrons utilize resources. Justifying the investment for higher priced resources typically requires a high return. Because usage statistics may significantly impact collection development decisions, the data must be consistent and credible. COUNTER statistics can provide such information for multimedia resources if vendors are willing to change how the statistics are collated and displayed.

Librarians at Georgia State University were asked by administrators to provide information on measurable use outside of the basic usage statistics: outcomes, results, usage, disciplines, and information about the types of patrons using the resource(s). All of these criteria affect the library's ability to assess value and would significantly impact collection development decisions. To meet the needs of collection administrators, ARTstor responded by approaching COUNTER and initiating an experiment to evaluate the metrics used for provision of statistics.

By way of example, a typical COUNTER report can relay any of the following:

- Number of successful full text article requests by month and journal
- 2. Turn-aways by month and journal
- 3. Number of full text article requests by year and journal
- 4. Total searches and sessions by month and database
- 5. Turn-aways by month and database

While these statistics are more than adequate for textual resources, multimedia resources are only adequately represented by the fourth metric: total searches and sessions by month and database. When the material is not a textual resource, the metric must

change to provide usable information. Terminology must change, and "use" must be re-defined.

The majority of ARTstor's use stems from image requests, not textual resources. Multimedia databases carry images, audio, and video; traditional usage statistics do not adequately reflect image views, downloads, and/or streaming.

In addition, the majority of users of non-text resources incorporate material into classroom instruction sessions and lectures, and may load the material into third party resources (Blackboard, etc.). These uses are not counted by any kind of statistical report. If trying to make the case to retain a certain resource, it may behoove libraries to formulate plans for acquiring statistical information about these different types of use. This kind of plan may involve significant contributions from administration (e.g. asking teaching faculty to contribute information about resources utilized, methods of access, and preferred formats).

Textual resources use different metrics and terminology and have unique frameworks that must be modified for fully non-text resources. COUNTER's tech advisory group (TAG) is actively working on this issue. In the meantime, libraries will be left to evaluate multimedia/non-text resources using statistical reports that do not provide detailed usage information.

When Jobs Disappear: Results of a Survey of the Staffing Implications of the Elimination or Significant Reduction of Check-in, Claiming and Other Print Serials Management Tasks

Sally Glasser, Hofstra University

Reported by Sanjeet Mann

As academic libraries shift their collections from print to online resources, how do these format changes affect the staff members working with the materials on a daily basis? Sally Glasser addressed this question in early 2010 by surveying libraries that had experienced a

"significant reduction" in print materials (defined as a decrease large enough to impact staff workloads). Glasser presented the results of her study and led a farranging discussion about the challenges of managing serials staff during such a dramatic change.

In her questionnaire, Glasser asked respondents to identify specific tasks in their serials/e-resources workflows that were recently eliminated or significantly reduced, and describe what happened to the staff positions and the individuals responsible for those tasks. She also asked whether positions were protected by a union and, if so, whether they were part of print or e-resources workflows.

Glasser received sixty-six responses to her survey, evenly split between small (1200-2500 FTE), medium (2500-10,000 FTE) and large (20-30,000 FTE) libraries. Binding was the task most frequently eliminated or significantly reduced; respondents also mentioned cutting back claiming, check-in, and periodicals stacks maintenance. Most respondents explained they were taking these actions as a natural result of dwindling print collections.

One or two positions were affected at most libraries. 85 percent of respondents managed to keep these positions within the library, often by formally reclassifying positions or asking staff to do different tasks. 72 percent of affected staff stayed in the library, but most needed retraining, especially if they were working exclusively with print resources before the reduction. A minority of staff either retired or left for a different job. Two-thirds of responding libraries did not have a staff union.

Changing from print to online formats requires staff to accept new, unfamiliar roles and enter into inherently complex e-resource workflows. Convincing staff to participate in the change and to develop the skill sets they will need to thrive in this environment is a significant managerial challenge, requiring transparency and collaboration with affected staff. Glasser concluded her presentation by urging her audience to document the library's continuing need for staff despite decreases

in print materials, to write flexibility into staff job descriptions, and to draw on the wealth of experience and knowledge of continuing resources that print serials staff have developed.

The Q&A session included discussion about the impact of unions on position reclassifications. Serials librarians contemplating staffing changes at a unionized library need to be familiar with clauses in the labor agreement stipulating percentages of duties that can be changed and criteria for triggering a change in grade. Personnel discussions that could lead to action against staff need to be carefully documented. HR staff is a valuable source of advice in these situations.

Other audience members offered suggestions for coping with resistance to change. Sometimes resistance is caused by "tunnel vision," and if librarians display respect for staff members' opinions and involve them in decision-making, it can help them come on board. Support from supervisors is essential; as one librarian observed, "trust starts at the top with the director." Staff who "just don't get it" despite multiple attempts at retraining can be isolated on special projects, and consider that sometimes "change comes one retirement at a time." But waiting is often not an option, and in this time of rapid change when print materials - if not always jobs – are disappearing, serials librarians need to hold difficult conversations with their staff, appealing to shared goals and promoting flexibility and resilience. "We've done great work," one librarian paraphrased, "but the situation is changing. How can we help you get through this? Because this is what you have to do differently..."

CONSER Update

Les Hawkins, Library of Congress; Hien Nguyen, Library of Congress; Adolfo Tarango, University of California, San Diego

Reported by Marie Peterson

Les Hawkins, Cooperative Online Serials (CONSER) program coordinator, briefly outlined the session and introduced the first speaker. CONSER program

specialist, Hien Nguyen, gave an overview of CONSER's history, membership, standards, and its programs, products and publications. A serials cataloging component of Library of Congress's Program for Cooperative Cataloging (PCC), CONSER began in the early 1970s to convert manual records to machine-readable format. Membership includes national libraries of three countries, ISSN centers, academic, public and special libraries, and corporate affiliates. CONSER's workshops, webinars, guides and manuals aim to increase the pool of knowledgeable serials catalogers and keep them current.

Les Hawkins followed with an update of the 2010 CONSER Operations Committee (OpCo) meeting held in Washington, DC in May. Among the topics at that meeting, OpCo representatives discussed workflows, approaches to title changes, and how to deal with records created under different cataloging rules, such as RDA. The Open Access Journal Project, by increasing the use of CONSER records for open access journals in epackages, will cut down on duplicated work and ensure access to reliable records. Hawkins continued with recent cataloging changes and upcoming RDA testing. Recent changes include indicator coding in the 246 variant title fields. Linking entry fields having a one-tomany relationship (e.g. one "mega disc" with contents from many journals) would use 787 fields rather than 776. MARC 21 changes include the use of the 588 source of description note, and adding form of item (008/23 and 006/06) "o" online and "q" direct access to the current "s" electronic.

The RDA testing timeframe, based on the RDA Toolkit release in June 2010, allows for free access to the Toolkit through August 31, 2010 for any registered libraries. U.S. testing will end December 31, 2010. The first quarter of 2011 is reserved for analysis and decision-making by three U.S. national libraries: Library of Congress (LC), National Library of Medicine (NLM), and the National Agricultural Library (NAL).

During the testing period some LC records are being created according to CONSER Standard Record (CSR) guidelines, and some using RDA. Once testing ends, and letter

assuming RDA is implemented, will some libraries still create records according to AACR2? Also, will guidelines need to be adjusted for the CSR and PCC provider neutral record?

Adolfo Tarango presented *The Work Segment Record: A Practical Approach to Applying FRBR Concepts to Cataloging Serials*. By defining a work segment as "all expressions and manifestations of a serial work issued under a specific title," —assuming that the researcher, or user, wants above all to access information online, but also still wants it if it is not online — we know that content is the foremost goal. Hence the cataloger's objectives: maximize access to content, facilitate navigation, capitalize and expose relationships, and accomplish all of this as quickly and economically as possible.

Work segment cataloging guidelines would follow AACR2 (RDA), but with such additions as: repeated 022 fields, the original manifestation title in 245, all other title variants in 246 fields with subfield "i" for clarity, and publication data for the 245 in 260, with data for all other formats in 533 fields. A ceased specific format would be recorded in a 500 note. One record accommodates all manifestations, maximizing access to content.

ERMs and Impact on Technical Services

Panel moderator: Susan Merrill Banoun, University of Cincinnati

Panel members: Deberah England, Wright State University; Angela Riggio, UCLA; Sharon Purtee, University of Cincinnati

Reported by Jennifer O'Brien

While there is a great deal of information available in respect to implementation, management, and data sharing with Electronic Resource Management (ERM) software, there is little to be found in respect to the impact on employees. Staff from three different libraries participated in a panel discussion of the impact

of ERM on the workflows in their respective technical services departments.

In November of 2008, the University of Cincinnati installed the Innovative Interfaces Inc. (III) ERM. III provided them with three days of training to assist with implementation of the module. In July of 2009, they reorganized in order to create an Electronic Resources department. Two additional staff members were hired, an electronic resources librarian and a collections librarian. Because one was an internal hire, there was a net gain of only one position. Subsequently, the main library absorbed the Health Sciences library and staffing in the Electronic Resources department shrank from 5 FTE to 1.5. While the Health Sciences library had originally operated as a separate entity, with its own technical services operation, it is now part of the larger library, with technical services "outsourced" to the main library.

Since the reorganization, the only traditional activity performed in the Health Sciences Library is periodicals check-in. The department also provides troubleshooting, but the majority of the technical services work has been eliminated. All of the new responsibility associated with ERM implementation had to be absorbed by employees throughout the department; workflows have been significantly affected. As time elapsed, the staff members concluded that ERM training was inadequate and scheduling was an issue. The information relayed in the training sessions was good, but documentation is scarce; they have come to depend heavily upon the systems staff, who must contact III when necessary. Goals for ERM implementation were set prior to training, and were not re-evaluated once implementation began. Staff believes goals should have been established after training, when they were more familiar with the ERM and its capabilities.

Currently, all ERM records for the Health Sciences library are hidden from the public; the decision to make the records viewable in the OPAC is dependent on a number of things, but specifically whether performance of a coverage load is warranted given the number of

resources in the ERM. The module remains visible only to staff; the ERM is used for generation of statistics, tracking of subscription periods, cataloging information, management of username and password combinations, and instructions for accessing resources. Staff would like to add more information about holdings and trial resources.

Wright State University installed and implemented III's ERM while reorganizing the library's computing services department. Webinar training was provided, but was insufficient for the library's needs due to problems with the coverage load. In order to fully implement ERM, instructions were gathered from the Internet, staff conducted site visits to other III libraries, and a student employee was hired to assist in the ERM implementation. Upon the student's graduation, however, the position became vacant, and has remained vacant. At this time, only one person is responsible for managing the ERM.

Troubleshooting, records management, and accessing financial information have been greatly improved by implementation of the ERM. Batch record loads are easy to process and resource packages are easily managed. Staff makes great use of ticklers for management of subscription periods, and updating of the A-Z list. Once records are populated, statistics are easily generated.

There are issues, however, with manual inputting and updating, poorly defined workflow, and time management. While staff considers the ERM to be a worthwhile resource, all scheduling efforts were seriously affected by implementation, and finding time to work on the module is a challenge.

When UCLA library made the decision to implement an ERM, it was using a proprietary system developed inhouse. After evaluating many options, UCLA is now implementing the Serials Solutions resource management product. Multiple staff members are

responsible for implementation and staff members anticipate different people will be responsible for specific tasks within the resource management system. For implementation, they have taken a distributive approach, with more than forty staff members developing new workflows and data structures. Only a limited number of staff members, however, are populating the system. One person will ultimately be responsible for the management of the new ERM system.

Training sessions were provided for select staff and were found to be sufficient. The concept of "train the trainers" worked well in this situation. Staff members believe, however, that wide scale training for the rest of the library staff will need to be significantly focused to ensure people get the intensive training they require. Based on what they have seen, staff members anticipate the new system will meet their expectations, with the caveat that ERM systems were developed in response to requests from libraries. If changes are needed, librarians must advocate for change.

Some staff members want the new resource manager to mimic the old one. This has been the most difficult part of the transition. While staff want the transition to be seamless to the end user, with the same or very similar discovery layer, the amount of time it is taking to fully implement the system in a manner which best serves the end user is considerable.

In short, ERM implementation and management at these libraries is inadequately supported. Staff numbers are commonly too low to allow for full scale, timely utilization of the product(s). Goals for electronic resource management should be established after training is complete – setting goals prior to seeing the module can create issues with workflow and project sustainability. The full potential of ERM systems will not be realized until adequate personnel resources are devoted to robust implementations.

What to Withdraw? Grappling with Print Collections Management in the Wake of Digitization

Roger Schonfeld, Ithaka S&R

Reported by Megan Curran

Roger Schonfeld works for the strategy and resource (S&R) arm of Ithaka, the not-for-profit organization that also houses JSTOR and Portico. His presentation is mainly concerned with ensuring the enduring preservation of print collections as physical formats continue to transition to electronic. Since 2000, Ithaka S&R have conducted surveys tracking faculty's perceived value of library collections and services over time. The survey employs purposefully strongly worded questions to elicit emotional, gut-reactions to these issues. In 2003 and 2006, 20 percent of the 3,000 faculty surveyed said they agreed strongly that hard copies of journals should be discarded; in 2009 that figure doubled to 40 percent. Schonfeld cites economic concerns and increasing familiarity with electronic journals as potential reasons for this change.

The sciences and social sciences were most likely to feel strongly about this issue. The humanities felt less strongly but were still increasingly more amenable to the idea (health sciences faculty were not surveyed).

Pressure on librarians to use less space for collections or to justify expenses for less popular resources has been increasing. Schonfeld stresses the importance of planning strategically for print collection preservation instead of acting on an ad hoc basis and potentially losing access to valuable resources forever. The Ithaka S&R preservation tool uses a scientific framework to identify the preservation community among libraries and calculate what materials can be safely withdrawn from a library without putting greater preservation goals at risk. Print journals need to be preserved somewhere to serve as base materials for fixing scanning errors, to compensate for previously inadequate scanning standards, or to replace a lack of digital preservation. A University of California Berkeley

operations researcher concluded that today the library community needs two perfect, uncirculated copies to keep for 20 years for proper preservation. Libraries can use the tool Ithaka S&R developed to identify which of their titles is well-preserved elsewhere. Schonfeld warns that the tool cannot substitute the decision-making process but can be used as a source of information.

The tool was released in the fall to positive feedback. Going forward, Ithaka and College & Research Libraries (CRL) hope to produce service agreements for institutions that will act as repositories for preserving certain print journal titles. They also plan on introducing a cost-sharing model for borrowing preserved items among libraries.

Tactics Sessions

Core Competencies for Electronic Resources Librarians

Sarah Sutton, Texas A&M University

Reported by Eugenia Beh

Sutton's presentation focused on her research interests including: electronic resources librarianship as a profession, definitions for electronic resources, electronic resources librarians, and competencies. She discussed her prior research, methodology, limitations, and her results.

The purpose of Sutton's research is to identify a definitive set of core competencies for electronic resources librarianship, as so far, no national or international serials/electronic resources professional organizations have adopted competencies for electronic resources librarianship. Her primary research question involved discovering what competencies library employers seek for electronic resources librarian positions. Prior research in this area focused on the identification of core competencies, changes in competencies over time, and the degree to which

competencies for electronic resources librarianship are taught in MLS programs.

Using content analysis to code words or phrases used to describe a competency, Sutton analyzed 246 job ads for electronic resources librarians published between January 2005 and December 2009. In her results, Sutton identified 76 competencies sought by employers in job ads, including, ranked highest to lowest:

- ALA-accredited MLIS (1st)
- experience with an integrated library system (2nd)
- the ability to work collaboratively (3rd)
- familiarity with industry trends (4th)
- customer service orientation (5th)

Competencies unique to electronic resources librarianship included:

- analytical and problem solving skills (7th)
- experience managing/maintaining e-resources (9th)
- experience with, knowledge of, or skill using technology (12th)
- experience with link resolvers and knowledge of OpenURL standards (13th)
- experience licensing e-resources (15th)
- flexibility in the face of change (16th)
- experience with or knowledge of serials/e-resources acquisitions (17th)
- cataloging related skills and/or experience (23rd)
- experience with or knowledge of electronic resources management systems (ERMS) (24th)
- experience working with e-resources vendors (25th)

Additional competencies included: experience troubleshooting e-resources, experience with or knowledge of federated search engines, experience with or knowledge of the administrative functions of library subscription databases, and the ability to incorporate new technologies and innovations into existing operations.

The significance of Sutton's research includes legitimizing electronic resources librarianship and strengthening its jurisdiction as a profession, providing employers with competent professionals, and providing educators with an understanding of the competencies

employers seek. At the end of her session, Sutton asked for volunteers to help with additional coding in order to further refine her results. Her slides are available at http://falcon.tamucc.edu/~ssutton/NASIG 2010.pptx

Integrating Usage Statistics into Collection Development Decisions

Linda Hulbert & Dani Roach, University of St. Thomas, St. Paul, MN

Reported by Megan Curran

Linda Hulbert and Dani Roach presented methods for "happy harvesting" of usage statistics and ways to apply them to principles of collection development. The presenters focused on cost per use as the best way to justify collection development decisions to non-librarian stakeholders. Librarians collect usage data in a variety of ways, but might be at a loss about how to analyze that data. Impact Factors (IF) and Return on Investment (ROI) are potential measures, but libraries are seeing that the highest IF journals in a field still might not be appropriate for their collection needs, and ROI is too time consuming to calculate in an efficient manner.

The University of St. Thomas (UST) subscribes to Serial Solutions' 360 COUNTER service to gather usage statistics. They add cost information to the tool and use that to calculate cost per use, which is then used by their library liaisons and subject affinity roundtables to decide which databases to keep, cancel, or add. UST librarians also apply a formula they call the "fairness factor," as they had noticed some subjects' collections budgets were eating up the budgets for others. In this formula, National Library of Medicine and Library of Congress statistics are weighted against the numbers of an institution's users in a subject and the intensity of their use. They are applying this formula for new acquisitions going forward; they could not retroactively apply it because of the negative impact on the science collection, where the resources tend to be far more expensive.

"I try to remind myself that usage statistics were never

black and white," said Roach, "It's never going to be perfect, and usage statistics are only one factor in decision-making." The presenters see their statisticsdriven collections process as a way to engage the faculty community by publishing lists of resources in danger of being cancelled, and putting resources on probation. They say they rarely encounter faculty who are unwilling to drop low-performing resources. Currently they gather usage statistics annually, but they predict what they count will get increasingly more granular as time goes on. They see interoperability between systems relevant to statistics and cost gathering becoming a growth area where vendors should respond. They also look forward to the continuing development of usage statistics tools like 360 COUNTER, Scholarly Stats, and Thomson Reuters' Journal Use Reports and standards like SUSHI and CORE to make the gathering and assessment process continually easier in the future.

Oasis or Quicksand: Implementing a Catalog Discovery Layer to Maximize Access to Electronic Resources

Ellen Safley & Debbie Montgomery, University of Texas at Dallas Libraries

Reported by Beth Weston

Ellen Safley and Debbie Montgomery reported on their library's exploration of improvements to their OPAC, resulting in the implementation of a discovery layer to maximize access to electronic resources. Safley opened the program with background on the University of Texas at Dallas, which uses the Voyager ILS and SFX. As an institution they recognized the decline in circulation and reference as a result of students using the Internet instead of the library. The library also recognized that when students used the catalog they found it very difficult and confusing. One indicator is the number of ILL requests for items held by the library, demonstrating failures to locate held items using the catalog.

A major part of the library's project to evaluate and improve the OPAC was focus group testing to find out

where users were failing in the online catalog. Using verbal protocol analysis, questions were read to students and their actions were observed. Results indicated that using the catalog is a major barrier for many users. Participants experienced failed search results due to confusion about the use of initial articles and punctuation; holdings statements were not understood, and advanced searching was not used.

The library made changes to the catalog based on the focus group results, and a second round of testing showed an improvement of 11 percent. However, there were still problems with library jargon. Users didn't understand the use of terms like "recall," "on hold," "series" and "returned." Holdings were still baffling and brief and long views of bibliographic records caused confusion. The library instituted another round of OPAC changes and convened a third focus group. There were still problems. Participants searched titles in the author index, for example, or were looking for articles. As a result of the focus groups, the library learned that students rely heavily on the A-Z list of publications that, at the time, only included e-journals. They also learned that students understand e-book, e-journal and fulltext, but these terms aren't used in the OPAC. Based on these outcomes, the library decided to investigate the option of implementing a discovery layer.

Montgomery continued the presentation by discussing the process of selecting and implementing a discovery layer product. The first requirement was to find a tool that would interoperate with Voyager. They evaluated Primo (Ex Libris), Encore (Innovative Interfaces) and AquaBrowser (Serials Solutions). When the evaluations were completed, the staff of forty chose to implement Encore.

There are known risks to working across platforms for this type of product. First, there was a serious need to "de-jargon" the displays. Availability of items is determined by a real-time query to item records in the Voyager catalog. Bibliographic record updates have to be loaded into Encore via the use of change files. The holdings are still not displaying as hoped. There is also a problem where records suppressed in Voyager are

displaying in Encore. This is because the suppress status in Voyager is not a MARC value.

Safley concluded with a list of what they like about Encore: it solved the initial article problem in searching, the spell checker helps users get more results, and search results are cleanly displayed. Staff like the cloud tags and the search forgiveness. One issue to note is that Encore relies on many of the attributes of the MARC format, making cataloging even more important. For the future, the next release of Voyager is slated to contain many discovery layer features. The library will have to evaluate that new release to determine whether or not they will stay with Encore or switch to a different product.

Shelf-Ready? An Alternative for Library Checking In and Claiming Print Journals?

Julie Su, San Diego State University Library; Jose Luis Andrade, Swets Americas; and Bob McQuillan, Innovative Interfaces Inc.

Reported by Laura Secord

As libraries face budget limitations, traditional serials functions and processes such as check-in, claiming, and binding are being evaluated for potential efficiencies. This session presented an example of using a "shelfready" service for print serials. Current print issues are delivered to the library shelf-ready from the vendor (e.g. Swets) ready for automated batch check-in and with claims already processed. Julie Su of San Diego State University (SDSU) Library opened the session, reviewing the factors that led her institution to explore this alternative. Despite serials cancellations and exponential growth of e-journals, the library still had print subscriptions to manage. They considered what they could do differently in light of dwindling staff resources. Shelf-ready serials presented a win-win situation: outsourcing labor-intensive claiming, batchreceiving journal issues (eliminating physical processing), and automating check-in. SDSU selected 200 titles to test with the Swets Consolidation system. They set up bi-weekly delivery, with journal issues

arriving with a SISAC barcode and a hard copy packing slip. SDSU feels that they had a successful outcome with outsourced claiming, with an over 95 percent fill rate and significant staff time savings.

Jose Luis Andrade, Swets Americas, presented the vendor's perspective, describing in detail how the Swets Consolidation Service works. The system uses predictive patterns to track when the next issue should arrive. Claiming is done automatically. Issues can be checked in through the library's ILS. Benefits to the library include receiving print journals in one consolidated shipment, the ability to determine the frequency of shipments, selecting only those value-added services (e.g., adding security strips to issues) that the library wants to pay for, and freeing up staff time for other tasks. Andrade demonstrated how shipments are tracked and shared examples of the types of data available to the customer. He explained that if the library has an ILS batch electronic check-in module, when the library receives the shipment, they pull the FTP file from the vendor site and load the check-in data into the ILS system. The records match on the SICI (Serial Item Contribution Identifier) code found on the bar codes added to each issue.

Bob McQuillan of Innovative Interfaces Inc. (III) shared the perspective of the ILS vendor. The III Serials E-Checkin Server provides automatic, batch check-in processing for print and e-journal shipments by uploading electronic packing slips from a serials vendor such as Swets or EBSCO and integrating the data with the Millennium Serials package. McQuillan demonstrated the steps involved in the check-in process. The Serials E-Checkin Server provides a centralized tool to electronically receive journals and automates the check-in process.

Several challenges and considerations were presented by the panel, including irregular publication patterns, title changes, and publication pattern changes; the software's ability to deal with a non-match; issues related to multiple library locations; and dealing with inconsistencies in data within check-in records. Despite the challenges, shelf-ready services have the potential

to provide time and cost-savings to libraries that choose to use them.

What Can the Cataloger Do with an ERM?

Steve Shadle, University of Washington

Reported by Jennifer O'Brien

While the Innovative Interfaces Inc (III) Electronic Resource Management module (ERM) is intended for the management of electronic resources, it is robust enough to manage a multitude of other tasks. The University of Washington library decided to use the module to load and track cataloging records. The electronic systems librarian, working closely with ERM implementation efforts, believed it could be used for management of cataloging record sets.

Before ERM implementation, the cataloger had been using file folders to manage the licensing and cataloging record sets. Each folder contained multiple notes with instructions for tagging catalog records, set numbers for loads, associated resource record numbers, bibliographic record numbers, and special notations for the III loader. Procedures for handling the record sets were poorly documented, licensing information associated with the MARC records had not been adequately stored, and tracking of financial information (vendor selection, purchasing price, etc.) was not available. Vendor cataloging contacts were unknown. These problems became far more acute once electronic resources were added to the catalog.

In order to ensure information was readily available to staff, the decision was made to incorporate it into the ERM. The ERM's record structure is robust, and allowed linking to both collection level and analytic bibliographic records using soft links. This allowed for easier identification of bibliographic set records with

associated resource records. Utilizing the fixed and variable length fields in bibliographic, resource, and contact records they established a framework for storing and extracting cataloging management information from the ILS. Most fields used were not changed from default, though some were re-labeled, and a local contact field was added.

Bibliographic source was added as a fixed-length field to all records. Contact records were added for individual record vendors. Using contact records to assign five letter codes representing bibliographic sources simplified workflows. In addition to adding contact records for record vendors, they also created a contact record for in-house cataloging. Should a particular record have more than one associated bibliographic source, information was noted in the cataloging note(s) in the resource record.

Cataloging status was added as a fixed-length field. This field contained a single code to identify the status of a particular set (evaluation, first load, update, ongoing, completed, etc.). Staff throughout the library could now track the status of individual record sets.

Cataloging notes were added to resource records. These notes contained information identifying persons responsible for record loads, bibliographic set numbers, bibliographic source identification, selector information, load dates, and any other critical information.

In addition to using these fixed and variable length fields, staff added additional information in the form of ticklers. This allowed them to keep track of continuing resources and irregular records, format changes, and vendor issues.

The management of set cataloging, facilitation of communication among staff, and the maximization of eresource investment(s) has been improved through utilization of the ERM.

Can't We Write a Little Script for This? Managing Serials Data and xISSN

Roy Tennant, OCLC; Mike Beccaria, Paul Smith's College; Adam Traub, St. John Fisher College

Reported by Margaret Hogarth

xISSN: An OCLC Web Service

Roy Tennant of OCLC gave an overview of a suite of OCLC Web Services available to member libraries, most free of cost. These services include the Search WorldCat API, the institution registry, WorldCat Identifiers, the QuestionPoint knowledge base (for reference questions), and xID Services.

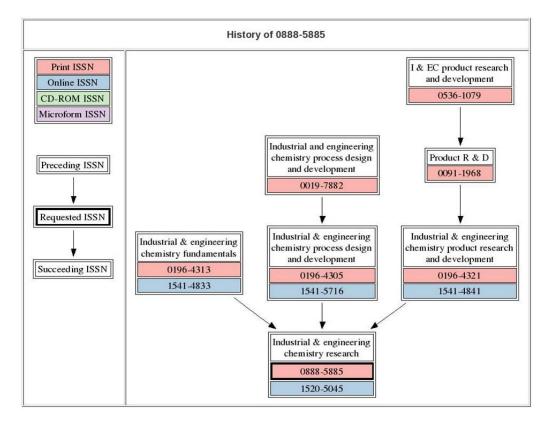
xID Services are based on identifiers such as xISBNs for books, xISSNs for serials, LCCN, and the OCLC number that allow mapping between systems. Using the basic metadata for the work (title, author, URL, etc.) the application can group alternate identifiers for the same work, such as different editions or print and electronic

versions. Using the metadata, the application can link to other systems such as Google Books or HathiTrust.

xID Services are based on REST-style Web Services as opposed to SOAP-style. REST stands for Representational State Transfer, which most simply means that each unique URL is a representation for an object. REST uses HTTP GET, POST, PUT and DELETE, and the results are human readable. REST works well with XML, JSON, and plain text, and supports JSON callback. xID Services mine WorldCat bibliographic data, which is updated monthly.

xISSN relates alternate editions and formats of serials, including predecessors and successors, mergers, and splits, indicates peer review status, and returns serials metadata that is parsed for human use. Tennant demonstrated the xISSN tool at http://xissn.worldcat.org/xissndemo/index.htm, (figure 1), which like a family tree, shows the relationships between related titles, their formats, and ISSNs.

Figure 1. xISSN Title History Tool



Tennant pointed out that the WorldCat API is well documented at http://www.worldcat.org/affiliate/tools?atype=wcapi. xID is incorporated into many sites, products, and projects including LibX, the Python WorldCat API module, xISBN bookmarklet, AquaBrowser, Koha, SFX, Bookchaser.com, Bookmooch.com and more.

To see xISSN in action, go to the <u>Ibsen Society of America's Survey of Articles 1996-2006</u>. xISSN is employed to indicate a journal's peer review status. xISSN checks against a list of 63 peer review sources that OCLC put together and returns the peer review status. If a title is peer reviewed, a green check appears to its left. The developer wrote the script for this xISSN function while on site at the Ibsen conference, showing how simple it is to implement.

Regina Reynolds, director of the U.S. ISSN Center, noted that while this was an incredible tool, she cautioned against using it to solve cataloging problems due to the high number of duplicate or incorrect ISSNs in WorldCat. ISSNs from the U.S. ISSN Center are accurate, but ISSNs from other sources may be incorrect. Roy encouraged participants to correct any errors found in WorldCat, emphasizing that we all need to work together to improve the accuracy of the data. Adam Traub reported that, in his experience, ISSN errors are fixed quickly in WorldCat.

Peer-Review and xISSN

During research instruction students are taught the difference between popular, scholarly and trade journals. Adam Traub noticed that students had to go back and look up journals in Ulrichsweb to be sure their sources were peer reviewed. To remedy this, Traub added about forty lines of code to the library's electronic journal portal. Using xISSN, the code checks the journal metadata against OCLC's list of peer reviewed journals, and returns "Peer Reviewed" in green and a checkmark for those that are scholarly (figure 2).

Figure 2. Peer-reviewed in E-journal Portal

Nature (London) (0028-0836) Peer Reviewed ✓ Title details from ulrichsweb.com™

The code can be added to e-journal lists, OpenURL linkers, and catalogs; it works on any JavaScript enabled page.

Traub noted that of OCLC's sixty-three sources for peer review status, not all agree, so he would like to choose which sources to consult. He wishes that the setup handled off-site users better. Essentially, there are two pools from which an institution's users draw from. Each ISSN sent to the xISSN service counts as one request. In Traub's case, they have one hundred requests available for unauthenticated users and 10,000 for authenticated users. Unfortunately, whether or not a user is on campus (for the IP authentication), xISSN uses up all one hundred requests available for unauthenticated users first. While on-campus users are for the most part unaffected, off-campus users do not get a peer-review check for any ISSN once those one hundred requests have been used up. Requests are used up before 10 a.m. on a normal day, earlier during finals. Traub would like the service to allow authenticated users a larger allocation, check IPs, or change the order of allocation use by sending the request to the authenticated user allocation first.

Using xISSN to improve the Browsability of our E-Resources

Mike Beccaria agreed with Traub that implementing xISSN is easy. Additionally, Beccaria has developed a prototype using OCLC's xISSN and WorldCat's API that allows students to browse similar journal titles from the library's e-journal A-Z list. Libraries have a tremendous amount of data, but patrons don't always realize the scope of what they are seeing. As a solution, Beccaria's script allows patrons to see related resources in the local context. As Morville said in *Ambient Findability*¹, "Findability precedes usability in the alphabet and on the Web. You can't use what you can't find." Find Similar Journals is an example of findability for e-journal

Figure 3. Find Similar Journals A-Z List



Back to library homepage

0-9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other Title contains all words

More full text options

Earth & Environmental Sciences ✓ Search 11 journals found in Earth & Environmental Sciences: Geography: Cartography Cartographic journal (0008-7041) Peer Reviewed Find Similar Journals Look up Article More full text options from 06/01/2003 to 1 year ago in Academic Search Premier Cartographic perspectives (1048-9053) Peer Reviewed Find Similar Journals Look up Article More full text options from 1989 to 2 years ago in Freely Accessible Science Journals Cartographica (0317-7173) Peer Reviewed Find Similar Journals Look up Article from 03/01/1997 to 6 months ago in Academic Search Premier Coordinates. Series B Look up Article More full text options from 2005 to present in Directory of Open Access Journals E-perimetron Look up Article More full text options from 2006 to present in Directory of Open Access Journals

Look up Article

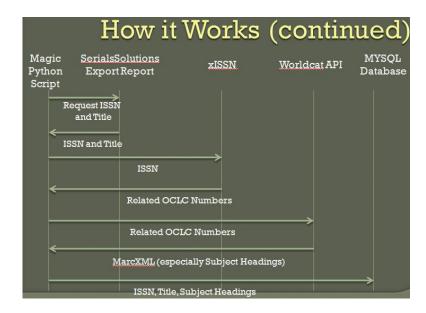
Behind the scenes (figure 4), a MySQL database is used to store the ISSNs and subjects for the journals. A Python script gathers the data from OCLC and stores it in the database. On the front end, a PHP script displays the titles to the patron, and JavaScript adds links to the

Globe (Melbourne) (0311-3930) Peer Reviewed Find Similar Journals

from 01/01/2007 to present in Wilson OmniFile: Full Text Select

Serials Solutions A-Z list. Working from related OCLC numbers and using MarcXML, the script queries WorldCat and returns the ISSN, title, and subject headings. When the link is clicked, the patron is taken to the link resolver.

Figure 4. Findability A-Z List Behind the Scenes



The WorldCat API grabs the 650 field and subfields a, x, y, and z. Initially, Beccaria's script draws only from the 650 | a field. He analyzed the data to see how many records have the 650 field with a, x, y or z subfields in them. In the future, Beccaria would like to develop a better algorithm so that the script delivers better results. He would also like to include 650 | x, y and z subfields. In addition to improving the visual appearance, Beccaria would like to see if the data is useful for other applications.

In order to implement this script, a library needs its own server, MySQL, PHP, Python, JavaScript, and a list of ISSNs and titles. Lists like these can be obtained from vendors. The code can be found by entering the search: Google Code: getrelatedissns or at http://code.google.com/p/getrelatedissns/

An attendee suggested pulling the call number from the OCLC record in addition to the subjects. Beccaria agreed this could provide better results and would be a worthy experiment. When asked if he could just pull the ISSN from his catalog, Beccaria clarified that the script can pull the ISSN from anywhere on a Web page. Attendees asked the presenters more about OCLC's peer review source page. Tennant explained that the site will be redesigned to enhance functionality. The data is not part of the MARC record and is compiled from various sources, including vendors. If the peer review data quality is an issue, why not ask Ulrich's if they have an API? While the accuracy of the data is a valid concern, the advantage of OCLC's peer review list is that it is free. When asked how OCLC deals with discrepancies in the peer review data, Tennant explained he was unfamiliar with the process, but will forward the question to someone with relevant expertise. It was noted that xISSN must be run at intervals; it is suggested monthly. Tennant was asked if the Title History Tool will display date ranges for journals. Date information is included in the xISSN guery, but it is not displayed in the results. Tennant reminded the audience that OCLC is open to enhancement requests. When asked about reciprocal fields, (continued by and continues) Tennant wasn't sure exactly how they were handled by the algorithm, but another staff member could answer the question.

Christie Degener recommended an article by Melissa M. Bernhardt ² which proposes a way to "program the online catalog to retrieve and display related serial records, by using the current accepted practice of successive entry cataloging and MARC bibliographic fields unique to a successive entry record." Results would be graphically displayed.

¹ Mooreville, Peter. 2005. *Ambient Findability*.
Sebastopol, CA: O'Reilly. p. 111
² Bernhardt, Melissa M. 1988. "Dealing with Serial Title Changes: Some Theoretical and Practical Considerations," *Cataloging & Classification Quarterly*, vol. 9(2), 1988, p. 25-39

Industry Initiatives - What You Need to Know

Ross MacIntyre, Mimas, The University of Manchester

Reported by Christine E. Manzer

The focus of this session provided basic education on new industry initiatives: KBART: Knowledge Bases And Related Tools (KBART), Transfer Code of Practice, and the PIRUS2 Project (PIRUS2), which stands for Publisher and Institutional Repository Usage Statistics and is sponsored by JISC, the United Kingdom Joint Information Systems Committee. Education and an overview are necessary before uptake and implementation can begin.

The morning of the session, a timely press release had been issued about KBART (the newest of these initiatives), announcing the first organizations to publicly endorse the Phase I recommendations.

Discussion of KBART among serialists and electronic resources professionals was lively. If recommendations are endorsed, it will be valuable to ask a publisher or database provider of full text for a title list with all the fields in KBART format. It will fall to those in the serials and electronic resources positions to remind publishers that endorsement and application of the recommendations would make everyone's lives easier.

Transfer Code of Practice is further along. The presenter clearly explained the initiative and indicated that it has gained broad acceptance since September 2008. Publishers are being asked to adopt the code.

PIRUS2 attracted the attention of session attendees responsible for usage statistics for online resources who are already familiar with the COUNTER Codes of Good Practice. The possibility of keeping a better handle on article level statistics will be on their minds as a result of this presentation.

Further information provided by the presenter can be found via web links on the 2010 Conference site, which also includes the KBART Glossary. The more consistent terminology use becomes, the better for all.

MacIntyre's presentation expressed his trust in the industry as represented in the room to see the value of these initiatives and to support them.

Let the Patron Drive: Purchase on Demand of E-Books

Jonathan Nabe & Andrea Imre, Southern Illinois University – Carbondale

Reported by Sanjeet Mann

Two librarians at Southern Illinois University – Carbondale (SIUC), Jonathan Nabe and Andrea Imre, shared their library's experience as an early adopter of patron-initiated e-book purchasing. SIUC subscribed to the MyiLibrary e-book platform in 2008 through a consortial offer from the Greater Western Library Association (GWLA). Putting down a deposit of end-ofyear funds gained their library access to a customized subset of Coutts' 230,000 titles hosted on MyiLibrary. SIUC received batch loads of MARC records and monitored monthly usage - how often library users clicked the "Open Now" link in MARC records to view the e-books. On the third time a given e-book was viewed, the item was automatically ordered with the purchase price charged against SIUC's deposit. Monthly invoices allowed acquisitions staff to create traditional purchase orders and track spending in their ILS.

Collection development librarians used Coutts' OASIS ordering website to add access to additional titles as desired.

Nabe reported that since November 2008 SIUC has added 8,456 MyiLibrary titles to their catalog, and users have purchased 470 titles at an average cost of \$115.30. Nabe described this as quite reasonable, considering most of these purchases are STM (Science and Technology Materials) texts. An additional 1,116 titles have been viewed, but not frequently enough to trigger purchase. The books are used substantially, with an average of ninety-five pages viewed per title. And 100 percent of the e-books ordered on demand have circulated, compared to 23 percent of print books bought during the same time period.

Imre advised libraries considering acquiring e-books to read license terms carefully for ILL and course pack rights, how the vendor will employ Digital Rights Management (DRM) technology, and how many simultaneous users will be allowed. With patroninitiated and traditional librarian-initiated collection development occurring simultaneously, there is the risk of placing duplicate orders, though MyiLibrary can indicate in OASIS which titles have already been purchased on demand. E-books also lack support on mobile devices and many licenses do not outline provisions for digital preservation.

In the Q&A session, audience members dove into the details of implementation, asking whether there was a fixed cap on the size of the deposit account and what would happen if the fund was depleted, whether it was possible to tell who had checked out an e-book, what would happen if two people tried to read the same e-book at once, whether SIUC used single or successive entry methods to catalog e-books, and what constituted a "click" when recording e-book usage. The enthusiastic response demonstrated that e-books are very much on librarians' minds and patron-initiated purchasing models have a viable future.

Licensing Electronic Journals through Non-Subscription-Agent "Go-Betweens"

Betty Landesman, NIH; Pinar Erzin, Accucoms, Inc.

Reported by Janet Arcand

Betty Landesman began the presentation by relating an interesting experience in setting up an online subscription. After expending much effort attempting to contact a particular publisher and receiving no reply, she was eventually informed the publisher was represented by the Accucoms agency.

The Accucoms representative was helpful in negotiating terms and setting up a contract with the publisher. Ms. Landesman later contacted IOS Press and Maney Publishing, and in each case she was given the name of the same representative from Accucoms. After a similar experience in contacting three other societies, and in each case being referred to a member of the SPCnet staff, Ms. Landesman realized a trend. Some publishers are using non-subscription agents to handle electronic resource licensing.

Pinar Erzin is the founder and managing director of Accucoms and was able to inform the audience regarding the reasons why some publishers prefer to use companies like hers as a "go-between". Erzin's employees come from a wide range of countries and have expertise in a variety of languages.

Accucoms represents nineteen publishers for the North and South American and the European markets, and there is some interest in developing markets from Middle East publishers. Accucoms exists as a "middle man" because business dealings between companies from different cultures can be hindered when cultural differences create misunderstandings. Some societies expect bargaining to be part of the process while in others polite agreements are important. The Accucoms staff members have the cultural fluency to understand local markets. Libraries benefit from these go-betweens by having fewer contacts to maintain and because the companies offer customer support in local languages

and time zones in case problems arise which must be effectively dealt with as soon as possible. Additionally, in the current bad economy, some publishers have chosen not to hire staff for business contacts and instead outsource this type of work to companies like Accucoms.

Erzin envisioned Accucoms as having a differentiated boutique approach. Unlike big box stores, boutiques have fewer goods, but have personnel who are more knowledgeable about the goods they have, and know which goods can be targeted to an appreciative customer group.

Beyond Lists and Guides

Amy Fry, Bowling Green State University

Reported by Jane Bethel

Amy Fry presented research about how libraries can design database web pages (including A-Z lists, databases-by-subject pages, and detailed records) to help college students find and choose the most appropriate e-resources for their research needs. She shared findings about database access best practices, the results of a usability study, and ideas for going forward.

Fry and her colleague, Linda Rich, conducted usability testing with fifteen college students at Bowling Green State University to find out how students use the database web pages, which are maintained through Innovative Interfaces' ERM. Their study found that databases-by-subject lists, while they made sense to students, were not usually used for resource discovery. When looking at full records for databases, students were confused by the term "mobile access" and did not think they would use tutorials, but they were interested in coverage dates, full text, and descriptions.

From watching students use their website, Fry and Rich learned that when their students have unsuccessful searches they are more likely to look for a different search box than to retool their search terms. Federated

searching and discovery layers are probably the best way to help students have successful searches and discover new resources. Fry recommended that libraries promote specific databases and connect lesser-known products with more popular ones, building on brand recognition among students.

One Identifier: Find your Oasis with NISO's I² (Institutional Identifier) Standard

Tina Feick, HARRASSOWITZ; Helen Henderson, Ringgold

Reported by Linda Pitts

Libraries and institutions now use many different self-identifiers for different purposes. They will, for instance, have one identifier for ILL, another for a consortia membership, another for their NUC symbol, and yet another for their institutional repository, as well as internal acronyms. With the growth of digital information, the proliferation of identifiers is becoming a critical issue. In July 2008, the National Information Standards Organization (NISO) convened the Institutional Identifier (I²) Working Group to tackle the problem. Tina Feick from Harrassowitz and Helen Henderson from Ringgold, two members of the working group, presented this session about the I² standard.

Feick first provided some background on the group and its mission. In the information delivery chain, the institution placing the order is a critical piece, but because identifiers for them are not global, there can be a breakdown in trying to identify a particular one.

Standard identifiers would be useful in establishing entitlements to digital information and would ensure, through the institutional affiliation, that the recipient is authorized to receive the information. Identifiers should be global, interoperable from system to system, unambiguous and unique, as well as able to integrate into existing workflows. They should support seamless access to information and would ensure that the information can be trusted as authentic. I² objectives include developing compelling cases for use and

developing strategies for unique identifiers that are interoperable, scalable, and require little maintenance.

The group will identify existing standards and see how they would satisfy requirements in various scenarios. Issues of granularity—how far down in an institution one should go in assigning identifiers—are still being discussed. The group will also identify a core metadata structure and an implementation and sustainability model.

The goal is to have a standard identifier for each institution that can be used across publishers, agents, and platforms, etc. This will require defining hierarchies and combinations, like consortia, as well as defining publishers, agents, online hosts, etc. An institution would use the same identifier with all publishers, making publisher cooperation essential, and would use the same identifier in each step along the information supply chain.

Phase I of the working group brought together various stakeholders from libraries, archives, consortia, subscription agents, distributors, publishers, hosting services, bibliographic utilities, and institutional repositories. The group divided the work up into three scenarios: the information supply chain and issues surrounding delivery of electronic resources, (the scenario that Feick and Henderson are working on), institutional repositories, and internal library workflows.

"Pain points" in the information chain include missing issues, subscriptions not starting, loss of access to e-journals, and problems with renewals or with titles moving to a new publisher. Standard identifiers would help in resolving such issues and would help ensure accurate and timely entry of the order. They would also be useful for agency and platform changes and for updating IP ranges.

For e-resources, this scenario group developed a metadata scheme that includes the institutional identifier, a variant identifier, the actual name, variant names, location, URL, domain, and related institutions.

There is a clear need for standard institutional identifiers. The scenario group working on institutional repositories sent a survey to relevant listservs to identify trends and found that many repositories have identifiers for the repository and for subordinate units, although they are generally not used in other contexts, such as for ILL or ERM systems. Respondents also thought that participation should be voluntary and cost-free. Institutional repository metadata would include elements for the institution name, the parent institution, and URL.

The scenario group working on library workflows sent a survey out to various library listservs to get feedback on the metadata elements needed to support workflows. The majority of respondents thought it would be important to include the formal name of the institution, the country, state, region, and/or city where it was located, and variant identifiers. There was also strong support for including a website URL, variant names, a relationship type (e.g. parent institution, consortium, department, etc.), and former names for the institution. For questions about a library workflows registry, about half of the respondents said it was important to provide initial metadata, although only about a third thought it would be important to be able to make changes whenever they were needed. Slightly over a quarter of respondents said it would be important to review the metadata at least annually.

Henderson then took the floor to talk about the current work in Phase II. There is agreement on the need for institutional identifiers, but questions remain about how this will happen and whether the identifiers will actually be used if they become available. Ongoing work includes developing a purpose, environment, and structure, identifying existing standards in this area, developing business scenarios for financing implementation, drafting metadata, and circulating a consultation document. The group's timeline for 2010 involves working on the final recommendation and reporting out by September.

Work on the environment and structure involves developing business scenarios and concepts for a central registry. There would also need to be decentralized business-specific registries. The scenario group is looking at similarities to the existing International Standard Organization (ISO) standard, the International Standard Name Identifier (ISNI), and is working on what features would be expected for institutional identifiers and the central registry.

There are already a number of standards that could potentially be adapted for use as institutional identifiers. These include the ISO ISNI, MARC organization codes, the NISO Standard Address Number (SAN), Dun and Bradstreet's DUNS Data Universal Numbering, OCLC Institution Identifiers, and DOCLINE LIBID. Of all of these, only the ISNI, which is still in draft, supports all of the features outlined in the paragraph above, as well as such requirements as the ability to include alternate identifiers and the ability to define and maintain basic relationships between organizations. Because of this fortuitous overlap, the scenario group has considered joining ISNI, but no decisions have yet been made.

There is now a first draft of the metadata requirements which lists the data elements and sub-elements, as well as their definitions and functions. The next steps are to evaluate and select an identifier standard, which includes reviewing existing standards, finalize the I² metadata, work out an implementation and maintenance strategy, and get stakeholder feedback. Distribution lists for gathering feedback include Liseresources, ACQNET-L (Acquisitions), ERIL-L (Electronic Resources in Libraries), LibLicense-L, Lis-LINK, various LITA lists, SERIALST, ALCTS-eRes, and the NASIG discussion forum. The goal is to have the work completed by December 2010. More information about I² can be found at www.iso.org/workrooms/i2.

Knowledge Bases and Related Tools: A NISO/UKSG Recommended Practice

Jason Price, Claremont Colleges and SCELC Consortium

Reported by Margaret Hogarth

Jason Price introduced KBART: Knowledge Bases and Related Tools (KBART), a standard for holdings list format. Backed by UKSG and NISO, KBART is "a set of practical recommendations for the timely exchange of accurate metadata between content providers and knowledge base developers." Working group members include knowledge base vendors (ExLibris, SerialsSolutions and EBSCO), content aggregators, publishers, subscription agents, libraries, and consortia. The full list of members is available at http://www.uksg.org/kbart/members. Publishers, aggregators, knowledge base vendors, and libraries will benefit from KBART, which enables better, more accurate access through a fully standardized holdings

list format.

Without KBART, tracking title and ISSN changes is difficult and labor intensive for each organization along the supply chain. The number of titles in lists from publishers and providers often doesn't match the library's list. Connections to earlier title versions aren't necessarily made in knowledge bases.

The KBART initiative was launched in January 2008. Challenged to find a single solution for sharing holdings data across the scholarly content supply chain, the working group analyzed knowledge bases, vendor practices, compliance, licensing, title relations, date coverage, link syntax and granularity, and data and transfer practices to determine common elements. It wasn't a simple process; often each piece of the complicated relationship branched out to many other pieces (figure 1).

Figure 1. Typical Supply Chain

Publisher provides object to:	Ontent Host, full text database, A&I against appropriate knowledge bas	
)R =>	=>
	nstitutional discovery tools (catalog,	
	-Z list, link resolver)	

Each step of the supply chain often involves transfer of metadata describing the holdings content. That data must be correct in order for the results to be accurate. The KBART standard can drastically improve each of these transactions.

The working group's efforts resulted in a set of fields with definitions and a basic set of requirements for

describing holdings, expressed as title level coverage by date, volume, and issue. The Phase I report, completed in January 2010, is available at http://www.uksg.org/kbart, and includes the first set of recommendations, KBART 1.0. The included fields are shown in figure 2.

publication_title	Publication title	
print_identifier	Print-format identifier (i.e., ISSN, ISBN, etc.)	
online_identifier	Online-format identifier (ie, eISSN, eISBN, etc.)	
date_first_issue_online	Date of first issue available online	
num_first_vol_online	Number of first volume available online	
num_first_issue_online	Number of first issue available online	
date_last_issue_online	Date of last issue available online (or blank, if coverage is to present)	
num_last_vol_online	Number of last volume available online (or blank, if coverage is to present)	
num_last_issue_online	Number of last issue available online (or blank, if coverage is to present)	
title_url	Title-level URL	
first_author	First author (for monographs)	
title_id	Title ID	
embargo_info	Embargo information	
coverage_depth	Coverage depth (e.g., abstracts or full text)	
coverage_notes	Coverage notes	
publisher_name	Publisher name (if not given in the file's title)	

Knowledge bases have problems of their own. Price manually checked 1400 titles in a knowledge base and found 1226 matches. Common problems in matching included: titles not listed (85), uncertain accuracy (59), over-reported access dates (31), under-reported access dates (14), and title changes not reported (7).

KBART will help with problem identification and resolution. Maintenance of accurate package content supports link resolvers and MARC record delivery services, and enables automatic updating by knowledge base providers. This standard also addresses common holdings list inadequacies such as the reuse of ISSNs, ambiguities in embargo periods and inconsistent date or enumeration formats.

Widespread adoption of KBART would end librarians' role as translators by addressing the best practice for including former titles and ISSNs. There would be no need to wait for the knowledge base data team to translate and update this data. Once the format is

standardized, automated ingest would be possible. Librarians would no longer need to deal with out-of-date title lists, as publishers would regularly update their knowledge bases.

Librarians can help by lobbying publishers to adopt KBART practices, and by learning about KBART and its goals. Librarians can insist on the principle of knowing what we are buying. As a practice, require delivery of a usable holdings list before you pay and ask for the list annually going forward. When librarians receive an inadequate list, point the publisher to KBART. Enable publisher sales staff to make the case for adopting KBART to their company and continue to request KBART-compliant lists.

Price then described two case scenarios for American Institute of Physics (AIP) and A Big Publisher (ABP). AIP self-initiated KBART as an early adopter whose data was already in KBART format. AIP is driving expansion into other formats such as conference proceedings. While

recognizing the problem, ABP needs to establish the priority of the change to the KBART standard and needs to get their hosting service to program the ability to export KBART-formatted datasets. It will take pressure from many customers to make these changes happen. Price then showed screen shots of AIP's Service Center with clearly marked KBART-compliant files available and an example of a file. KBART files easily export to Excel.

At this time the KBART working group is building a selfcheck tool so that information providers can easily check their holdings lists to make sure they comply. Publishers wanting to comply to the standard can review metadata requirements on the KBART transition site http://www.uksg.org/kbart/s5/transition to see if any changes are needed. Once e-book and e-journal data is formatted to meet the requirements, the publisher can self-check their data and make corrections. Publishers will want to ensure they have a process in place for regular data exchange as outlined in section 5.2 of the KBART report. Then they can register their organization on the KBART registry site, which will provide a link to download the newly formatted dataset(s). The registry records basic information about the organization and serves as a clearinghouse for KBART formatted files.

KBART Phase 2 will involve more content-type coverage. Price hopes that Phase 3 will allow consortia and institution-level holdings metadata distribution based on what is accurately accessible from a particular IP.

Questions from the audience were insightful and showed unmet needs. When asked to elaborate on the "earlier title" problem, Price suggested that knowledge base providers need to build in the capacity to track earlier titles in their databases. He pointed out that we don't need publishers to re-design their sites, just their access lists. Posting access dates and what resources libraries purchased would be very useful. When journal information on the publisher's site is inadequate, Price encouraged us to direct the publisher to KBART. When free promotional access is pulled for a journal, does KBART recommend anything? KBART has not discussed this yet. When asked about gaps in coverage, Price

mentioned the difficulty of policing compliance. However, he is confident that many publishers will register with KBART. When asked how to make a case with a publisher, Price recommended explaining how their data is affecting access. Data helps; many publishers have analytics to show where their users are coming from. The importance of including available selected text was noted.

When asked if standardized URLs are in the future, Price reported that Adam Chandle, who is working to increase OpenURL transparency, had worked with KBART in the first phase, and has now re-joined the group. Price is hoping to add a standardized URL question into the registry. He is excited about the registry becoming a source for the industry. The KBART working group started to look at Open Access, but it quickly became too complicated. It is possible to add a note in the coverage note field to indicate Open Access. Price was asked if KBART has addressed non-Roman materials. KBART has not as of yet, but he pointed out that since knowledge base providers are able to handle non-Roman material KBART should provide similar functionality. Libraries frequently need a list of URLs for proxies. Price responded that a script shouldn't be too difficult to write that takes a feed from major catalogs, knowledge bases, and proxy providers to then create the list of necessary URLs.

Metadata Value Chain for Open Access

Holly Mercer, Texas A&M University

Reported by Evelyn Brass

The metadata value chain for open access scholarly journals expedites the use of independent single-title society journals and small non-commercial journals. These journals may originally have been published in print and are now being digitized, or these journals may have started as digital publications. The metadata chain is part of the larger scientific communication value chain. A value chain is defined as a chain of activities. Metadata for an article gains value as it goes through various activities of the chain. Metadata for an article

has more value in an Internet search engine or a citation database than it did for the author writing the article.

Dublin Core allows authors to initiate the metadata, while editors and librarians enhance the metadata to ensure better access for users of databases or search engines. Open access articles are indexed for scholarly content.

Texas A&M University is a founding member of the Texas Digital Library (TDL). The TDL hosts nineteen higher education institutions and state agencies in Texas, and provides an open access publishing platform for faculty's new e-journals or open access journals.

Procedures for new journals include securing licenses, developing market promotion, and establishing an ISSN. Popular open journal publishing systems include DSpace and Open Journal System (OJS).

Librarians can help the digital process by hosting and distributing open access publishing and explaining contracts to authors. Librarians also must make authors aware of authority control, ISSNs, and DOIs (digital object identifiers) for retrieval of articles or journals. Data sharing of open access material has become increasingly important, not just for retrieval of articles, but also in the preservation of this material.

Profile

Katy Ginanni

Susan Davis, Profiles Editor

At the end of the profile Maggie Rioux prepared for the NASIG Newsletter in 2003, she suggested we ask Katy what she had planned as her next trick. I don't think having another profile as new NASIG President was the first item on Katy's list, but here we are; filling in the gap from December 2003 to the moment Rick handed over the gavel in Palm Springs. I purposefully didn't ask her about NASIG matters as I expect she'll cover those in her President's columns.

Katy recently moved from being e-access and serials librarian for Trinity University in San Antonio, TX to Western Carolina University in Cullowhee, NC to become collection development librarian.

What was there about serials in that first job at Vanderbilt (that you sort of fell into) that made you love them so much to build your career around them?

I never actually decided to build my career around serials! I did enjoy that paraprofessional position in serials at Vanderbilt. My boss and mentor, Sylvia Martin, said to me once that anyone can handle a monograph: you buy it, you catalog it, you put it on the shelf, you bid it farewell. But working with serials is like

fitting a jigsaw puzzle together. It's always challenging and interesting! My plan, though, was to get my MLS, perhaps seek a second master's degree in history, and go into special collections and/or archives.

But when I finished library school, there was a serials acquisitions position open at Auburn, and since that was what most of my experience was in – and I needed a job to start paying student loans! – it made sense to apply for it. And the rest, as they say, is history.

Talk about your time in South Africa. I followed your adventures on your blog, where you posted so many wonderful photos. I'm happy to see that it is still up!

Susan, you are welcome to link to the blog. It is at www.katyginanni.blogspot.com.

Maybe it's important to know how I got to South Africa before I talk about my time there. When I came back from Zimbabwe, I took a position as training specialist at EBSCO. I'd been doing that for about five years when the manager of EBSCO's office in Johannesburg (who I had met when we both temporarily worked in EBSCO's London office in 1996) wrote to say that she needed a new sales manager and didn't I need a change? After thinking about it for some weeks, and then a try-out visit for six weeks, I decided that I could use a change.

In a weird way, my time in South Africa helped me achieve some measure of closure on my interrupted time in Zimbabwe. Weird because the experiences were so different. In Zimbabwe, I taught at a rural school where I had no electricity or running water. I walked to the market in the township, or took a bus on weekends to do shopping in town (2 hours away). No TV, no Internet, no take-out food, no washer and dryer. On the other hand, I had all the modern conveniences in Johannesburg. It is a very modern city that could be anywhere in the developed world. There are malls and art museums and restaurants and concert halls. But it is still African. And being able to spend some significant time there, even in a 180 degree way, helped me find peace with my somewhat abrupt departure from Zimbabwe.

My stock response, when asked about South Africa, is that I loved South Africa but I did not love Johannesburg. After I'd been there for about eighteen months, I realized that I was a tense, nervous wreck. I returned to the U.S. about six months later. However, I don't regret one minute of my time there. It is a remarkably beautiful country and if anyone wants advice about what to visit, where to stay, and so forth, I'm always happy to talk about that touristy kind of stuff. But I also enjoyed myself from a professional standpoint. I hate to sound ethnocentric, but the truth is that I was pleasantly surprised by the state of academic libraries in South Africa (and other southern African countries that I visited, such as Namibia and Botswana). They don't enjoy the same level of funding that most of us in U.S. libraries do, but they're not so terribly far behind, either. And I discovered that librarians in South Africa are the same as librarians I've met at home and in other countries: for the most part, we are all doing our best to meet the needs of library users. I enjoyed meeting and working with many librarians in my two years there.

Early on in my stay, I volunteered to fill an empty slot as secretary for my provincial chapter of LIASA (Library and Information Association of South Africa). That was also a very good experience. As with NASIG and other professional associations in the U.S., those who

volunteered for work in LIASA were librarians who were dedicated to serving their profession. I was happy to have found a professional "home" in the Gauteng South Branch of LIASA.

And I was very thankful that EBSCO allowed me to remain active in NASIG while I was working in South Africa. I had just been elected as a member at large when I got the opportunity to go to South Africa, and I hated the thought of stepping down. EBSCO agreed to pay for my trips back to the U.S. in order to attend board meetings. I don't think either NASIG or I could have afforded it otherwise.

Tell us a bit about working at Trinity and living in San Antonio, home (or former home) of other famous NASIGers--Bev Geer, Bea Caraway, Clint Chamberlin, Dan Tonkery, Danny Jones, Kathy Soupiset, Marcella Lesher (apologies to anyone I've left out).

My job at Trinity was the first in a library since 1992, and I really did have an adjustment period. I didn't feel the same sense of urgency that comes with being a vendor representative. In other words, no one expected me to respond to emails within an hour of receipt. [Ed. Note: Hmm, I'm not so sure that lack of urgency is true across all academic libraries!]

But the adjustment didn't last terribly long, and it felt very good being back on a college campus. And I think that Trinity was an extraordinarily good place to be. Not only was the library one of the least dysfunctional I've been in (and I've been in a lot!), but the atmosphere all around campus was welcoming and supportive. By and large, people wanted each other to succeed – from students to faculty and staff and administrators.

I really loved San Antonio, too! Sure, I'd been there for conferences; who hasn't? Conferences are big business in San Antonio. But actually living there was fun, too. There's an amazing diversity there. Of course there is the Hispanic population, but did you know that since the mid-1800s, there have been several groups of European immigrants who settled in that area? Lots and lots of Germans, but others, too.

[Ed. Note: Yes, I visited Kerrville, Fredericksburg some years back and enjoyed some of the Alpine décor!]
Having a large military presence also increases the diversity. And while I admit that I missed the verdant greenness of the southeast U.S., I'll also admit that South Central Texas has its own loveliness. I also really, really enjoyed learning about and seeking out Texas music and Texas dance halls!

And the move to Western Carolina?

I've wanted to live in the mountains of western NC for years and years, so this is really a dream come true for me. I've been here for six weeks now, and there is still hardly a day that I don't see something that makes me exclaim, "It's so beautiful here!" I enjoyed exploring the area in my downtime between jobs, and will continue to do so, probably for years and years. If I get tenure! [Ed. Note: Excuse me, that's when you get tenure!]

Another important aspect of my move is that it's a change in focus in my career. I've been in serials since 1985! (That was my first paraprofessional position at Vanderbilt.) I've been interested in collection development for quite some time, but I think it's difficult to get jobs in collection development without experience. Fortunately, my job at Trinity included serving as a liaison to one academic department and one cross-disciplinary program, and apparently the folks at WCU thought that was enough for me to get my foot in the door. So far, I'm really enjoying the change. It's pretty cool to know that I can help shape the collections in Hunter Library, and have an indirect but important influence in the learning process of our students.

<u>Merlefest</u> —describe a typical day at (Hmmm, any possibility of a joint NASIG conference there? :-)

Oh, trust me: if some NASIGers didn't like dorm rooms, they certainly won't like Merlefest camping! Some of the campgrounds have only cold water showers! There just aren't very many hotel rooms in Wilkesboro, NC.

Here's a typical day at Merlefest. Wake up later than you intended, because you stayed up too late playing and singing at the campfire the night before. Stand in line (probably) for the shower. Bum coffee from Laura (she makes it by the gallon, I think) and breakfast from Martha (she cooks pounds and pounds of bacon, no exaggeration). Consult the day's program with your friends, figure out a rough schedule of which bands/stages you'll see during the day, when and where you might meet up with friends. Pack up your gear for the day (rain gear, snacks, water bottles, chairs) and stand in line for the shuttle over to campus. (Merlefest is held on the Wilkes Community College grounds.) Enjoy great music, well-behaved crowds, great music, sunshine, great music, visiting with friends, great music and festival food. Did I mention great music? Head back to camp in the evening to eat a little supper, have a beer or two (no alcohol on campus), load up your clothes for the chill of a NC April night, and then head back to the festival. Enjoy more great music. Come back to camp around 10pm-ish, ask everyone what was the best thing they heard that day, play and sing at the campfire, go to sleep. Repeat.

Have you been to other music fests/events? What are their good/not so good features?

I've been to a number of music festivals, some tiny and some bigger than Merlefest. But Merlefest continues to be the standard by which I judge other festivals. In its 25 years, the festival organizers have taken suggestions and made serious improvements in the infrastructure of the festival. They have a great customer service attitude, and they really try hard to make it a good experience for the attendees. I'm ashamed to say that I've never been to the Philadelphia Folk Festival (ashamed because my sister lives there and I have little excuse), and I'd really like to get out to Telluride, CO for that festival, too. A standout was the High Sierra Music Festival in Quincy, CA (that year), and an annual favorite is the small but excellent Acoustic Café that a friend north of Birmingham puts on every year. I've been a regular volunteer there since 2000.

Tell us more about what else occupies you in your spare time. Pets, hobbies? Love to cook? Eat? Music? Movie buff? TV programs? Books you love to read? Do you still dive?

I like dogs and some day when I'm not traveling so much, I'd like to have a dog. But at heart I'm a cat person. We had cats when I was growing up, and I've always had cats as an adult. Right now I have two, Maggie (a friendly, soft calico) and Tessie (a gray tabby who I almost lost last year and as a consequence, she has become extremely attached to me).

I come from a family of foodies, so I am passionate about both cooking and eating. In the last couple of years, I've become very interested in food production and policy in this country, and attempt to buy local and organic as often as possible.

Although bluegrass is my passion, I have very diverse musical interests. In fact, it's pretty safe to say that I like almost anything except rap, hip hop, pop and techno. And death metal. No death metal. I really enjoy listening to live music, and one reason I'm excited about living in western NC is that I'll have all kinds of opportunities to hear live bluegrass, old time and folk music.

I love going to movies but for whatever reason I don't seem to do it very often. I watch more TV than I ought to, but that's because I got cable for the first time a couple of years ago and discovered the almost endless re-runs of Law & Order, Law & Order: SVU and Law & Order: Criminal Intent. NCIS, Bones and House also rank high in my orgies of re-run watching.

I don't read nearly as much as I used to. Now it usually takes me at least two or three weeks to read one book. One of the things I LOVED about being in Zimbabwe (with the Peace Corps) is that because I had no electricity, I had none of the modern distractions – no TV, no Internet. I read SO MUCH while I was there! I miss having that time for reading and writing.

I haven't dived since I left South Africa, and I regret that. It's an activity that requires both time and money, and I seem to have been short of one or the other – or both! – since the fall of 2007. One of these days...

What does "Radical militant Librarian" mean to you? (Background— John Ashcroft, US Attorney General at the time, complained about the "radical, militant librarians" who were arguing on behalf of their users' right to read freely, without government interference or surveillance, and helped to influence the Congress in its vote to extend its debate on the renewal of the USA PATRIOT Act. Katy's sister made her own button (ALA sold its own version) so Katy could distribute them during an ALA Midwinter in San Antonio—I still have mine!)

If John Ashcroft thinks that protecting privacy and the freedom to read makes me radical and militant, then I will wear that appellation proudly. What a boob.

What else should I have asked about?

That seems pretty comprehensive to me! I can't think of anything else.

Other NASIG News

Wanted: People Interested in Writing or Re-writing NASIGuides

Publications and Public Relations Committee needs people like you to update or re-write guides on topics such as electronic resource management, license negotiation, OpenURL and ISSN.

Other possible topics for new guides include but are not limited to: electronic resource workflow, FRBR implications for serials, RDA implications for serials, and claiming workflows.

If you or someone you know is interested please consider sharing your knowledge.

Contact: Kathryn Johns-Masten, kathryn.johnsmasten@oswego.edu

Disclaimer: NASIGuides must be written by current

members of NASIG.

Committee Reports

Database & Directory

August 1, 2010

Chair:

Maggie Ferris (University of Delaware) 09/11

Vice Chair:

Maria Collins (North Caroline State University) 10/12

Members:

Mary Bailey (Kansas State University) 10/12; Jessica Minihan (University of Mississippi), 10/12

Board Liaison:

Lisa Blackwell

Activities

The committee started off the 2010/2011 year with the routine business of maintaining the *Directory*. The committee invoices members due for renewal, sends renewal reminders, deactivates and reactivates members as needed. The committee informs Membership Development of members needing an additional renewal reminder and informs the *Newsletter* of new members to be welcomed to the organization. The committee also responds to numerous inquiries for password reminders and general questions about renewals.

The chair and vice chair are in the process of dividing up these directory-related tasks, as well as considering database maintenance needs.

Action Items

- Divide tasks among committee members
- Train committee members in ArcStone

Membership

The following statistics are derived from ArcStone.

Total Active members: 693

Corresponding members: 5

In the last three months, May-July, 2010:

Deactivated members (chosen not to renew): 25

New members: 16

Total unpaid invoiced members:

Unpaid invoiced members 7/1-7/28/2010: 20
Unpaid invoiced members 6/1/-6/30/2010: 20
*Unpaid invoiced members 5/1-5/31/2010: 41
*these members have been reminded and must make payment by 8/8/2010 to avoid deactivation.

Membership Renewal Patterns

Please note, the total number of renewals in the table below will not equal the current total number of active members due to members paying early or late.

Month & Year	No. Renewals
July 2009	6
Aug 2009	12
Sept 2009	3
Oct 2009	110
Nov 2009	87
Dec 2009	61
Jan 2010	90
Feb 2010	73
Mar 2010	62
Apr 2010	45
May 2010	36
June 2010	19

Submitted by

Maggie Ferris, Database & Directory Committee

Financial Development

May 1, 2010

Committee Members:
David Bynog, Rice University
Stephen Clark, College of William and Mary
Susan Markley, Villanova University
Zac Rolnik, Now Publishers (Chair)
Peter Whiting, University of Southern Indiana

Board liaison: Rick Anderson

The Financial Development Committee continues to experience change in its membership, adding three new members in 2009-2010 to replace members who either retired or resigned from the committee. Nonetheless, we were able to make some progress on a number of fronts. This includes:

- The FDC is responsible for creating and implementing a multi-faceted fundraising program designed to support NASIG programs and activities. The committee prepared the first NASIG Comprehensive Development Plan and submitted it to the NASIG Board at the last Annual Conference. After careful review, the Board agreed to pursue many of the recommendations, including a vendor showcase and newsletter advertising.
- The FDC created a draft version of its committee manual.
- The FDC completed an investigation of our insurance policies. We recommended no changes to our existing policies. Based on a detailed consultation with Duncan Financial (the group that covers our Officers and Board members) it is clear that we are in good shape with the general liability policy that we hold through Zurich.

Please let me know if you have any questions.

Respectfully,

Zac Rolnik, Chair

NASIG Site Selection Annual Report 2009-2010

June 14, 2010

Committee Members: Rick Anderson, Katy Ginanni, Joyce Tenney

Committee Activities

The Board instructed the committee to conduct site visits with Buffalo, NY, Niagara Falls, Canada, Nashville, TN, and St. Louis, MO for the 2011 annual conference site. All three sites visits were completed by the end of August and revised bids were received from all sites. After evaluation and review, the information was distributed to the Board for review and decision. All three cities were excellent locations for the annual conference. The Board determined that the passport requirement to visit Canada might present financial and logistical problems for too many members. The Board initially selected St. Louis, MO for the site of the 2011 conference and Buffalo, NY for the 2012 conference. Negotiations were conducted for the 2011 conference, and the St Louis Hilton Ballpark, St. Louis, MO was selected for the site of the 2011 conference.

The dates of the 2011 conference are June 2-6, 2011. The room cost will be \$117.00 per night, plus tax. This will include wireless internet access in the sleeping rooms and all of the meeting rooms.

After this contract was completed, negotiations were opened with the Buffalo, NY properties. It was determined that the dates available in those properties were not a good match with our schedule. The board was consulted and it was determined that the economic conditions of a "buyers market" were offering NASIG favorable contract conditions, so we proceeded to contract with Nashville, TN for the 2012 conference. Negotiations were reopened with the Nashville properties, and the Sheraton Music City in Nashville, TN was selected as the site for the 2012 conference.

The dates of the 2012 conference will be June 7-10, 2012. The room cost will be \$129 per night plus tax.

This will include wireless internet access in the sleeping rooms and all of the meeting rooms.

Questions for the Board

Do we want to look in summer 2010 for a location for the 2013 in the northeast? Buffalo, NY is still interested and other northeast locations have approached me, each with some logistical issues. Is it, perhaps, worth looking at?

Or should we wait a year before looking for the next site, as we are booked for 2011 and 2012?

Other Serials & E-Resources News

Report on ERIG, ALA Annual, June 2010

Reported by Beth M. Johns, MLIS, Electronic Resources & Reference Librarian, Saginaw Valley State University, Michigan

Statistics seem to be a never ending topic of interest in librarianship and this year's presentation by the ALCTS Electronic Resources Interest Group (ERIG) was no exception.

Often a dry presentation topic, the speakers at this meeting used timely and useful information, as well as a little humor, during the panel discussion, "Down for the Count: Making the Case for E-resource Usage Statistics." Topics briefly covered the spectrum of e-resource statistics.

Nadia Lalla of the University of Michigan encouraged deeper analysis of statistics that most of us gather at least monthly. For example, "turnaways" provide a statistic on the number of users that were unable to access a resource, but the librarian should ask why that user could not access a resource. Questions can be generated from a statistical number and answers can determine its usefulness and cost per use, and justify the cost of a resource or its elimination.

Doralynn Rossman of the Montana State University
Libraries explained the differences between print book
pricing models and those of e-books, as well as weeding
practices. Since pricing models are so different between
print and electronic, price per book can seriously skew
statistics. When using statistics to justify weeding, keep
separate statistics for print and electronic. Find overlaps
between print and e-books and weed accordingly.
Packages of e-books can be cost effective, but can also
add "noise" to a collection so be selective about these
types of purchases.

Problematic e-book statistics were presented by Leslie Czechowski from the University of Pittsburgh. "Turnaways" are a common and important statistic for e-journals, but currently, many e-book vendors are not reporting this number in their COUNTER statistics. Definitions in non-COUNTER statistics are difficult to interpret, with statistics labels such as "document count" and "monthly book usage." Conversations with e-book vendors about COUNTER compliant statistics are an important step to rectify this issue.

Monica Metz-Wiseman of the University of South Florida presented her topic on "Counts within Context" as a case study of a recent incident at her university. Statistics were gathered, but did not tell the whole story. In the end, university data such as publishing by faculty and grants awarded to faculty who used library resources in the grant writing process were examined against usage statistics for each resource. The numbers told a story—if cuts were made, someone or something vital to the university would be disadvantaged. The good news is cuts to the library budget were avoided.

Tansy Matthews of the Virtual Library of Virginia presented an interesting, yet somewhat complicated topic on consortium statistics and the difficulty in reporting cost per use to state legislators due to how the data is stored. She has developed a formula using XML reports that are downloaded into Access, providing consistently formatted data that can be manipulated easily for reporting purposes. The end result is a fiscal year cost per use. She can be contacted with questions about this formula at tansy.matthews@gmail.com

Finally, Bob McQuillan of Innovative provided a NISO SUSHI update. Details on SUSHI 1.6/COUNTER 3.0 can be found at http://www.niso.org/workrooms/sushi.

Columns

Checking In

Kurt Blythe, Column Editor

[Note: New members, please consider reporting the story of how you came to be a member of NASIG. You may submit items about yourself to Kurt Blythe at kcblythe@email.unc.edu. Please include your e-mail address.]

Please allow me to extend on behalf of NASIG a welcome to this quarter's new members, and my thanks for choosing to share with the readers of the *Newsletter* the stories of how they came to join our area of practice and professional organization.

First up is **Angela Black**, who writes from the University of Arkansas:

I started in serials six years ago as a copy cataloger, specializing primarily in the re-cataloging of locally-significant, rare, and older serials in our Special Collections. I loved the hunt, you could say, of tracking down title changes spanning over a hundred years and uncovering connections no other library had found between works that document the history of my home state of Arkansas. Now I work in the Serials Department as a records maintenance supervisor for electronic resources. I love what I do, and I enrolled at the Florida State MILS program to explore new techniques in serials management and contribute to the scholarship of this rapidly changing field.

Another student, this time at the University of Missouri, is **Zach Coble**. Zach was one of six persons to receive the Student Grant to attend the NASIG annual conference, and he enjoyed the opportunity to meet librarians, vendors and publishers all in one place. Just

as important to Zach was the chance to learn more about the complex challenges and opportunities that make serials work interesting. He hopes to see everyone in St. Louis in 2011!

Jason Curtis recently graduated from San José State's Library and Information Science program and is now the serials librarian at Thomas Jefferson School of Law in San Diego, CA. Jason has worked with serials for the past seven years as a paraprofessional at other law libraries in the San Diego area prior to becoming a librarian. When he is not busy managing the serials at work, Jason enjoys cooking, watching westerns, and exploring new places with his wife. He is glad to be part of an organization that is directly related to his daily work and that strives to provide support and guidance relevant to the unique problems and situations of serialists!

Like Zach, **Ivey Glendon** also comes to NASIG as an award-winner, having received the 2010 Fritz Schwartz Serials Education Scholarship. And, like Angela, Ivey is currently a distance education graduate student in the School of Library and Information Science at Florida State University. In addition, Ivey works full time as a digital conversion specialist in the Serial and Government Publications Division at the Library of Congress, where she works in the National Digital Newspaper Program (NDNP). Ivey writes:

Attending the annual conference in Palm Springs was a rewarding experience, and I feel fortunate to have been able to attend. The vision session on linked data was directly relevant to my work with NDNP, and the other sessions gave me a peek into issues that I hear of at work but in which I am not directly involved. I left the conference knowing more about serials, and knowing lots more folks who work with serials! The conference was a great way to meet others in the serials community and I hope to be able to attend the NASIG annual conference in the future.

Citations: Required Reading by NASIG Members Kurt Blythe, Column Editor

[Note: Please report citations for publications by the membership—to include scholarship, reviews, criticism, essays, and any other published works which would benefit the membership to read. You may submit citations on behalf of yourself or other members to Kurt Blythe at kcblythe@email.unc.edu. Contributions on behalf of fellow members will be cleared with the author(s) before they are printed. Include contact information with submissions.]

Thank you to this quarter's contributors, both for contributing to the column and to scholarship. The extent of research possible to serialists never ceases to fascinate me.

Nancy Beals, "Revisiting Wayne State University's ERM System: Six Years Later," *Against the Grain* 22, no. 2 (2010): 20-22.

David M. Bynog and Jane Zhao, "Telling Our Own Story: Fondren Library's Oral History Project," *College and Research Libraries News* 71, no. 5 (May 2010): 240–47.

Katy Ginanni, Lindsey Schell and Susan Macicak, "The Right Stuff at the Right Price: Pay-Per-View Models for E-Journals and E-Books" (panel presentation, annual conference of the Texas Library Association, San Antonio, TX, April 14-16, 2010).

The PowerPoint is available from Katy.

Linda K. Lewis, Fran Wilkinson, and Nancy Dennis, <u>Comprehensive Guide to Emergency Preparedness and Disaster Recovery</u> (Chicago: ACRL, 2010).

Linda writes, "I'm delighted to have the final product available; it was a special project to work on. My wistful hope would be that no one else has to go through disasters like all the librarians who contributed to this book did. But a more realistic hope is that this book can help others prepare for the potential disasters, and perhaps even minimize the damage from any disasters."

And from ACRL's press release:

Authors Frances Wilkinson, Linda Lewis, and Nancy Dennis provide practical and experience-based approaches on preparing for a disaster by creating a plan, responding to an emergency, and the intricacies of recovering from a disaster.

Comprehensive Guide to Emergency Preparedness and Disaster Recovery features seven compelling, reality-based case studies from six university libraries that recovered from earthquake, fire, flood, or hurricane damage. The clearly organized text contains numerous photographs and a comprehensive appendix featuring an extensive bibliography and glossary, a model disaster preparedness plan and a model RFP for selecting a disaster recovery vendor, as well as useful Internet sites and print resources. The work provides sound explanations and advice on every aspect of disaster preparedness, response, and recovery in libraries.

Title Changes

Kurt Blythe, Columns Editor

[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.]

This quarter has not been quiet when it comes to moves in the field.

Nancy Beals, who also published an article in *Against* the *Grain*, was promoted from librarian I to librarian II as the electronic resources librarian for the Wayne State University Libraries.

Jane Bethel became a colleague of mine, joining the University of North Carolina at Chapel Hill as the EPA electronic resources/reference librarian. Jane writes:

This is my first professional position after graduating from Dominican University, although I served as the

serials associate at St. Olaf College in Northfield, MN from August 2003 until June 2010 and have been a NASIG member since 2004. I so enjoy working with Tamika Barnes, Susan Forbes, Michael Cummings, and April Errickson here at the EPA campus. I feel very privileged. I am working through all sorts of serials issues as you might well imagine.

Heather Cannon made two changes this quarter, writing first to report that she had become the head of Collection Support Services at Loyola University, Chicago's Health Sciences Library, having previously been the serials & e-resources librarian there. Then, Heather wrote:

As of August 9, I will be the technical services librarian at the Adler School of Professional Psychology in Chicago, IL. This will be my second place of employment as a professional librarian position after having been at the Loyola for the past eight years.

At the end of May, **Katy Ginanni** reluctantly left Trinity University and moved to Cullowhee, NC, where she started as collection development librarian on July 1. Katy writes:

I loved both Trinity and San Antonio, but have wanted to live in western NC for years, so this is really a dream come true for me. Moving into collection development is another exciting change. Not to worry, though — NASIG will be a part of my life forever! Or at least until I retire...

Katy may now be reached at:

Hunter Library
Western Carolina University
176 Central Drive
Cullowhee, NC 28723
ksginanni@email.wcu.edu

Phone: (828) 227-3729 Fax: (828) 227-7380 Past President of NASIG, **Mary Page** joins the University of Central Florida (UCF) Libraries faculty as associate director for Collections & Technical Services on August 9, 2010.

From UCF's press release:

Page received her MLS degree from Rutgers University where she also served in a variety of librarian positions for nineteen years. Most recently employed as assistant university librarian for Technical Services at the University of California-Davis Library, Page brings with her extensive experience in all aspects of technical services, including acquisitions, serials, collection management and collection development. Among the many leadership positions and service activities in which Page has been involved are the Ingenta Library Advisory Board, the National Academy of Sciences ... and The North American Serials Interest Group (NASIG). She currently serves as a Director-At-Large for the Association for Library Collections & Technical Service, Board of Directors. She was also a guest editor and writer for Against the Grain and other professional publications.

And, **Lynn Shay** has changed her place of employment to the University of North Carolina, Wilmington where she is the electronic resources/serials librarian.

Editor's note: The state of North Carolina would appear to be a popular destination, and, as a resident, I can't say I blame my new neighbors for coming.

Calendar

Julie Kane, Conference and Calendar Editor

September 30, 2010

North Carolina Library Association Resources and Technical Services Section (NCLA RTSS)
RTSS Fall Workshop
"Navigating the New Frontier"
Greensboro, NC
http://www.nclaonline.org/rtss/event/rtss-fall-workshop

September 30-October 3, 2010

American Library Association, Library & Information Technology Association (LITA)

LITA Forum 2010

"The Cloud and the Crowd"

Atlanta, GA

http://www.ala.org/ala/mgrps/divs/lita/litaevents/nationalforum/index.cfm

October 2-3, 2010

American Society for Information Science and
Technology, Pacific Northwest Chapter (ASIS&T PNW)
InfoCamp Seattle 2010
Seattle, WA
http://seattle.infocamp.org/

October 6-9, 2010

American Library Association, Library Research
Roundtable (LRRT)
Library Research Seminar V
"Integrating Practice and Research"
College Park, MD
http://www.lrsv.umd.edu/index.html

October 25-27

Information Today, Inc.
Internet Librarian 2010

"Insights, Imagination, and Info Pros: Adding Value to the Internet"

Monterey, CA

http://www.infotoday.com/il2010/

October 27-30, 2010

Museum Computer Network (MCN)
MCN 2010

"I/O: The Museum Inside-Out/Outside-In"

Austin, TX

http://www.mcn.edu/mcn-2010-austin

February 28-March 2, 2011

Electronic Resources & Libraries (ER&L)

ER&L 2011

Austin, TX

http://www.electroniclibrarian.com/conference-info

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November 1, 2010

Send submissions and editorial comments to:

Send inquiries concerning the NASIG organization and

membership to:

Angela Dresselhaus

3000 Old Main Hill Merrill-Cazier Library Utah State University Logan, UT 84322

Phone: 435-797-8042 Fax: 435-797-2880

Email: angela.dresselhaus@usu.edu

Send all items for "Checking In", "Citations," & "Title

Changes" to: Kurt Blythe

Email: kcblythe@email.unc.edu

Send all items for the Calendar to:

Julie Kane

Email: jkane@sbc.edu

Carol Ann Borchert

Coordinator for Serials

University of South Florida Libraries

4202 Fowler Ave. LIB 122 Tampa, FL 33620-5400 Phone: (813) 974-3901

Fax: (813) 974-2296

Email: membership@nasig.org

NASIG address: NASIG, Inc. PMB 305

1902 Ridge Rd.

West Seneca, NY (USA) 30033-5305

URL: http://www.nasig.org