



# NASIG Newsletter

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## President's Corner

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Steve Kelley

I would imagine that many people, if they've been in the workforce for a few years, have been in a job where the job description and/or job title didn't match what they actually did. When I started a paraprofessional job at UNC-Chapel Hill in 1994, my job description called for spending half of my time filing new cards in the card catalog, even though the card catalog was in the process of being dismantled and new cards had not been added to it in years. You could say that NASIG's vision and mission statements are sort of our organization's job description. As job descriptions, they're not as out of date as my card-filing job description was, but they could use a little freshening up. While NASIG remains very committed to serials, we are also quite involved with electronic resources, licensing issues, and scholarly communication issues that do not quite neatly fall under the term "serials." In short, we need to update our job description. To that end, earlier this year, the board appointed a task force to look at revising our vision and mission statements to better reflect where NASIG is and what our concerns are as an organization. The task force consists of experts in the field of continuing resources from both inside and outside NASIG, award-winning librarians, and many past presidents of NASIG. The chair of the task force is Steve Oberg, and the other members are Rick Anderson, Betsy Appleton, Patrick Carr, Lauren Corbett, Tina Feick and October Ivins. The plan is for them to have revised versions of the vision and mission statements ready for the membership to vote on (and hopefully adopt) at the business meeting at the 30<sup>th</sup> NASIG Conference in Washington, DC in May 2015.

That addresses updating our organizational job description, but what about our organizational title? There has been discussion among the membership for several years that the full name of our organization, the North American Serials Interest Group, is no longer apt.

The term “interest group” seems to diminish the scope of our organization, and makes it sound like we are a smaller sub-group of a larger organization, when we are really an independent society. Also, the term “serials” in our name can be somewhat misleading. The truth is, when some people hear “serials” in our name, they think that we only deal with print serials, instead of the wide range of resources and issues that we deal with (electronic resources, licensing, scholarly communications, and, yes, print serials). The Executive Board would like to propose that we consider officially changing the name of our organization to just plain NASIG, without a meaning attached to the individual letters. This would mirror what our older sister organization UKSG did, as well as OCLC. There is brand equity built up in the name NASIG, so we would not want to abandon it entirely, but we think that the name North American Serials Interest Group may be losing its usefulness. The board has done some initial investigation, and the process of changing our name is quite simple from a legal point of view, and costs only a small filing fee. We invite the NASIG membership to discuss this issue over the coming months in any of the NASIG forums, especially NASIG-L. The board hopes to be able to ask the membership to consider a motion to officially change our name to NASIG at the business meeting at the 2015 conference, along with a motion to adopt the new vision and mission statements. My hope is that we can get our job description and job title updated as we celebrate the previous 30 years of NASIG history and prepare for the next 30 years.

And while we’re on the topic of celebrating 30 years of NASIG, it’s not too early to start making plans to attend our 30<sup>th</sup> Annual Conference in Washington, DC, May 27 through May 30, 2015. If you’ve quickly consulted your 2015 conference schedule, you may have noticed that

the conference does not fall in our normal Thursday to Sunday pattern, but rather runs from Wednesday to Saturday. That is because we will be having our first-ever joint conference programming with another organization. The 2015 NASIG Conference will begin on Wednesday, May 27, with joint programming with the Society for Scholarly Publishing (or SSP). There will be no extra fee in your NASIG registration for you to attend this special joint programming, and all conference attendees are invited. We have booked a large block of rooms for Tuesday, May 26, so you can fly in, get a good night’s sleep and be ready for the joint programming on Wednesday morning. On Wednesday evening, we will have a regular opening of the NASIG Conference, and NASIG-only programming will begin on Thursday morning. The conference will run until noon on Saturday. After the conference closing, we will have post-conference workshops available for the afternoon of Saturday, May 30 and the morning of Sunday, May 31, to take the place of our usual pre-conferences. Our Conference Planning Committee will also provide information about museums and Grayline tours for folks who want to stick around and check out the town after the conference. In addition, there will be an evening event celebrating NASIG’s 30<sup>th</sup> anniversary on Friday, May 29, which you won’t want to miss. We have a 30<sup>th</sup> Anniversary Celebration Task Force that is cooking up something special.

Don’t worry, you won’t have to remember all that. It’s just the first push in an ongoing campaign to let everybody know that the 2015 NASIG Conference will be a little bit different from previous conferences, and hopefully very memorable.

One last thing, if you have an idea for a presentation you’d like to give at the conference, keep an eye out for the Program Planning Committee’s call for proposals, coming this fall.

## NASIG Taking over Moderation of SERIALST

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Steve Kelly

NASIG is pleased and honored to announce that we will be taking on the moderation of the long-standing listserv, SERIALST, as a service to the serials community.

The sudden and tragic passing of Birdie MacLennan last March left a hole in NASIG and in the wider serials community. Birdie was a founder and the list owner of the SERIALST listserv, and her passing threw the future of SERIALST into doubt. Birdie's home institution would like to transition the list elsewhere, and the remaining moderators, Ann Ercelawn, Bob Persing, and Stephen Clark, thought NASIG might be a good match. In April the SERIALST moderators began discussions with the NASIG Executive Board to see if NASIG was interested in taking on the management of SERIALST. NASIG will be a good home for SERIALST, and our Communications & Marketing Committee (CMC, formerly ECC) already have the expertise of managing the NASIG lists. Beth Ashmore, currently on the CMC, has graciously agreed to be the main SERIALST moderator for NASIG, with the rest of the CMC available to back her up and assist. Because NASIG is not tied to a particular academic institution, the future of the list will not be tied to the

presence of a SERIALST moderator at a particular institution. The NASIG Executive Board is very excited about this opportunity to provide the valuable service of managing SERIALST to the serials community.

On July 14, 2014 the NASIG Executive Board unanimously passed a resolution that NASIG take on the management and moderation of SERIALST. We have signed an agreement with L Soft International, Inc. to provide the hosting service for SERIALST. This hosting will include access to the full archives of SERIALST.

In order to cover the considerable expense involved with managing SERIALST, the Board voted to designate the funds NASIG receives from Taylor & Francis for publishing our conference proceedings in *The Serials Librarian* to pay for the management of SERIALST.

Please join the NASIG Board in offering enormous thanks to Ann Ercelawn, Bob Persing, and Stephen Clark for their years of diligent service in maintaining SERIALST.

We hope that you will join us in celebrating this exciting news about NASIG's future.

## Essay for the 2014 NASIG Horizon Award

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Sol M. Lopez

### 2014 NASIG Horizon Award: What it Means to Me

Recognition, whether in the workplace or within the profession, is certainly very satisfying. For someone like me, who is just beginning in the profession, it was very meaningful when I learned I was the recipient of the 2014 NASIG Horizon Award sponsored by EBSCO. Not only did it mean that, yes, I was able to write up a good essay on the current state of electronic resource management and where it's headed and why it's important to stay abreast, it also means that I have chosen the right path in a highly specialized library

science field. Having just arrived back home from Fort Worth, Texas, where the conference was held, I now get to sit back in my office chair and absorb the experience.

I greatly admired the friendliness of the NASIG community. To my advantage and surprise, the first person that I spoke to soon after arriving was Steve Kelley, now President of NASIG for 2014/2015, who was walking alongside me to hop on the shuttle to Billy Bob's, where the opening reception was held. When I told him my mentor was Leigh Ann DePope, he made it a point to search for her to introduce me. After meeting

both of them initially, I knew that my experience as a first-time attendee would be memorable and very welcoming. Leigh Ann then introduced me to Dana Whitmire, who handled all the travel arrangements of the award winners. We were all then cheerfully led to the opening session area to prepare for the awards portion of the session. It was a privilege meeting and



getting to know the other award winners, like David Walters, Angel Guzman-Contreras, Yayo Umetsubo, Stephanie Rosenblatt, Emily Cable, and Jamie Carlstone, many of whom are from other countries. The remainder of the night was much fun--the Marshall's enthusiastic storytelling of the beginnings of Fort Worth, coupled with the delicious Southern-inspired food--really helped to set the tone for what the remainder of the conference would be like.

During the conference the next day, someone recognized me as an award winner and congratulated me, asking if it made me feel uncomfortable that my picture, along with the other award winners, was being projected ahead of the first vision sessions. I said no, and explained that although I was not used to having that much attention, as I had never won an award before, it was actually nice because it made networking a tad easier!

The sessions I attended were excellent, and the speakers were clearly experts in their fields. The vision sessions gave me much to think about and learn, from web archiving and trends in scholarly publishing and open access, to the importance of developing outreach skills in order to better communicate what we do and why we do it. It is overwhelming, yet exciting, to see where we are headed in the digital environment. I appreciated that there were enough sessions to choose from each time slot. Although there were few sessions on cataloging itself, as a serials cataloger and someone who works very closely with the electronic resource management team, choosing a relevant topic for a session was not a difficult decision. All of the attendees I met were also from academic libraries, which made it very easy to discuss common practices and to share thoughts and ideas.

I look forward to becoming a NASIG member and interacting with the serials community. I now have to think about what skills sets I have that (as suggested by now Past President, Joyce Tenney) I can share, as well as gain, by volunteering with NASIG! Thanks again NASIG for selecting me for the award. My experience there was terrific, and I can now tell my boss, who had been encouraging me to attend, that she was right -- it's a highly valuable conference and organization to participate in.

## Interview with Kathleen McGrath, the 2014 Merriman Award Winner

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### ***Please start by describing your current position and how you've been involved with serials?***

I am currently the acquisitions librarian at the University of British Columbia (UBC) in Vancouver, Canada. In this role, I oversee monograph and serial acquisitions, and provide leadership and support for the library's e-preferred collections program. I've worked at UBC for over twenty-five years with a few title changes, but have always been involved in some aspect of serials management.

### ***What initially led you to NASIG and why you continue to stay involved?***

Shortly after I began at UBC, I recall receiving a bulletin, possibly from one of our subscription agents, introducing NASIG and announcing the conference at Oglethorpe. As a new serials librarian, this seemed like the perfect organization for me. I joined immediately and was hooked after attending my first conference at Claremont College in Scripps, California in 1989. Hosting the conference at UBC in 1994 has been one of the highlights of my career and led me to the privilege of serving a term on the NASIG board. Through NASIG I have developed professionally, travelled to places I'd never imagined, and made lifelong friends.

### ***What prompted you to apply for the Merriman award?***

I have longed to attend a UKSG conference ever since I first heard stories from John Merriman himself at Claremont. I've always enjoyed meeting the UKSG delegates when they attend our NASIG conference and listened wistfully as they described their event. My fantasy was fed by UKSG e-news bulletins that kept me informed of the activities of the organization and UK/European counterparts. Receiving the Merriman award was a dream come true.

### ***How did you react when you found out that you were the recipient?***

I was absolutely thrilled. I received the email on my birthday. I can't imagine a better gift.

### ***What were your first impressions of the UKSG conference?***

UKSG staff members Karen Sadler and Alison Whitehorn gave me a warm welcome. I had the chance to meet them and the UKSG Continuing Education Committee at dinner on the evening before the conference. I was keen to learn more about how UKSG provides its impressive roster of [CE events](#) throughout the year.

Harrogate is a lovely spa town. It was looking its sunny best during the week before Easter and gearing up for the excitement of being host site for the [Tour de France Grand Depart](#) in July. The Harrogate Conference Center is a lovely facility and the main auditorium was very grand and comfortable – despite the unreliable Wi-Fi!

Throughout the conference, the Exhibition Hall served as the centre of activity. Space here was coveted, and word has it, booths were sold out months in advance on the day they were released. The large hall featured spacious and attractive booths, plus plenty of room for demos, formal business meetings, and casual conversations with vendors. Delicious noontime meals and cocktail receptions were served here each day.

### ***How do you think the experience of attending the UKSG will affect your career?***

I hope this won't be the last UKSG I attend. It has stimulated my curiosity about UK and European academic libraries and desire to learn more of the different approaches they are taking to serve their users.

***How was the UKSG conference different from the NASIG conferences that you've attended?***

The UKSG conference is clearly an important venue for doing business. It has developed as a strategic opportunity for vendors, publishers, and librarians in the UK and Europe to meet collectively. The sharing of ideas, professional development, and networking are equally important; however, these goals are also met by UKSG continuing education events and a one-day conference held in the fall.

The NASIG conference is more informal, though that has certainly evolved as we've moved from dorm room to hotel accommodations. One feature of the NASIG program I value is the many occasions it offers delegates to get together outside the sessions – providing time and venues for informal discussions, late night socials, and exploring the local sights.

***What was your favorite USKG session and why was it your favorite?***

There are so many highlights to mention.

David Nicholas and Carol Tenopir's insightful investigations of trust and authority in scholarly communication are touchstones for all aspects of the academic enterprise. In his talk on the "Impacts of impact," Ernesto Priego, City University of London, delivered countless quotable quotes, though his comment, "Publishing: where content goes to die," is one that haunts me still.

I was especially taken by the presentations of Anders Soderback of Stockholm University "The Library Happens Elsewhere," and Simone Kortekaas of Utrecht University's "Thinking the Unthinkable – Doing Away with the Library Catalogue." Their message to "focus on delivery" has stayed with me. Anders peppered his audience with provocative questions and enthusiastically led us through a series of 2-minute breakout sessions that contributed to a lively discussion.

It was fascinating though sobering to hear Guilhem Chalancon, a data scientist and PhD student at Cambridge, describe his knowledge management habits. He didn't mention a library once.

Ed Pentz, of CrossRef served as an ebullient Master of Ceremonies for the traditional Quiz and Curry Night held in the fabulous [Royal Hall](#).

***What are the differences between the two organizations, UKSG and NASIG?***

UKSG is not just the elder sibling NASIG; there's also a hint of old world, new world realities – just as we've come to appreciate in fine wine. UKSG operates within a comparatively small geography, and serves many institutional and organization members.

NASIG membership is diverse in institutional size and geographical range. The professional development focus is more centered on library practices and standards.

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

Go for it! UKSG will be held in Glasgow next year.

As the date approaches, review the program and list of exhibitors to discover what interests you. I enjoyed meeting some of the UK and European-based vendors whom I have worked with by email and phone. I can now place a face to a name.

The UKSG website has heaps of information, including a [conference website](#) with the full program, and links to presentation videos and SlideShares. It's definitely worth checking out.

***Is there anything else you'd like to share with us about your experience as a Merriman award winner?***

I feel very honored by this opportunity. John Merriman was a special individual. I was lucky to have had the

chance to meet with some who had known him well and related fond memories of bygone years in serials publishing and the founding of UKSG.

His spirit lives on, as NASIG and UKSG continue to do wonderful work in bringing people together to debate and address common problems, and ensuring that fun be had in the process. Congratulations to David Walters

of Kings College London, my UKSG counterpart, who had the good fortune to go to NASIG this year in Fort Worth, Texas.

My sincere thanks to Taylor and Francis for their generous sponsorship of this award.

## Upcoming Conference News

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### **CPC Update: NASIG at 30: Building the Digital Future**

Mark Hemhauser and Ted Westervelt, CPC co-chairs

NASIG's 30<sup>th</sup> annual conference will take place in Washington, DC from Wednesday May 27<sup>th</sup> through Saturday May 30<sup>th</sup>, starting with a joint session with the Society of Scholarly Publishing on that Wednesday. The conference will be taking place at the Hilton Crystal City, which is located within easy walking distance to shops, restaurants, and the Crystal City Metro Station. All of the Washington, DC attractions are a short [Metro](#) ride away! [Ronald Reagan Washington National Airport](#) is the most convenient of the three airports in the area with the hotel offering its guests complimentary shuttle service. The other two airports are [Washington Dulles International](#) located in Chantilly, VA and [Baltimore/Washington International Thurgood Marshall Airport](#) located 32 miles northeast of D.C. in Maryland.

Please contact the [Conference Planning Committee](#) if you have any questions and we look forward to seeing you along the Potomac next May!

### **PPC Update: Call for Proposals October 1 – November 15**

Anna Creech and Danielle Williams,  
PPC chair and vice chair

The Program Planning Committee will hold one Call for Proposals from October 1 – November 15, 2014 for the 2015 NASIG Annual Conference. The decision was made last year to reduce the number of Call for Proposals to a single call in order to alleviate confusion and to streamline the proposal process. More information regarding the proposal submission process will be available in the coming weeks.

The 2015 NASIG Annual Conference will have at least one day of overlapping programming with the Society for Scholarly Publishing conference. This is an exciting opportunity for us to try a few new things with our own programming, in part because we will need to make some adjustments to our schedule to accommodate the shared time. PPC will be sharing more on this as the details are ironed out.

PPC is currently discussing potential vision speakers around the conference theme, as well as practical, hands-on workshops for the post-conference sessions. We are looking forward to carrying on the tradition of bringing thought-provoking Vision Speakers, exciting workshops, and innovative sessions to the NASIG Annual Conference. Please contact the PPC Chairs at [prog-plan@nasig.org](mailto:prog-plan@nasig.org) if you have any questions or recommendations.

## Post Conference Wrap-Up

### 2014 Conference Evaluation Report Taking Stock and Taming New Frontiers May 1-4, 2014

#### Submitted by

2014 Evaluation and Assessment Committee:  
Jennifer Leffler (chair), Bridget Euliano (vice-chair), Sally  
Glasser, Derek Marshall, Jane Smith, and Kathryn  
Wesley

The 29<sup>th</sup> annual NASIG (North American Serials Interest  
Group) conference was held in Fort Worth, Texas. The  
conference offered three pre-conferences, three vision  
sessions, thirty-six program sessions, four “Great Ideas  
Showcase” sessions, four snapshot sessions, and vendor

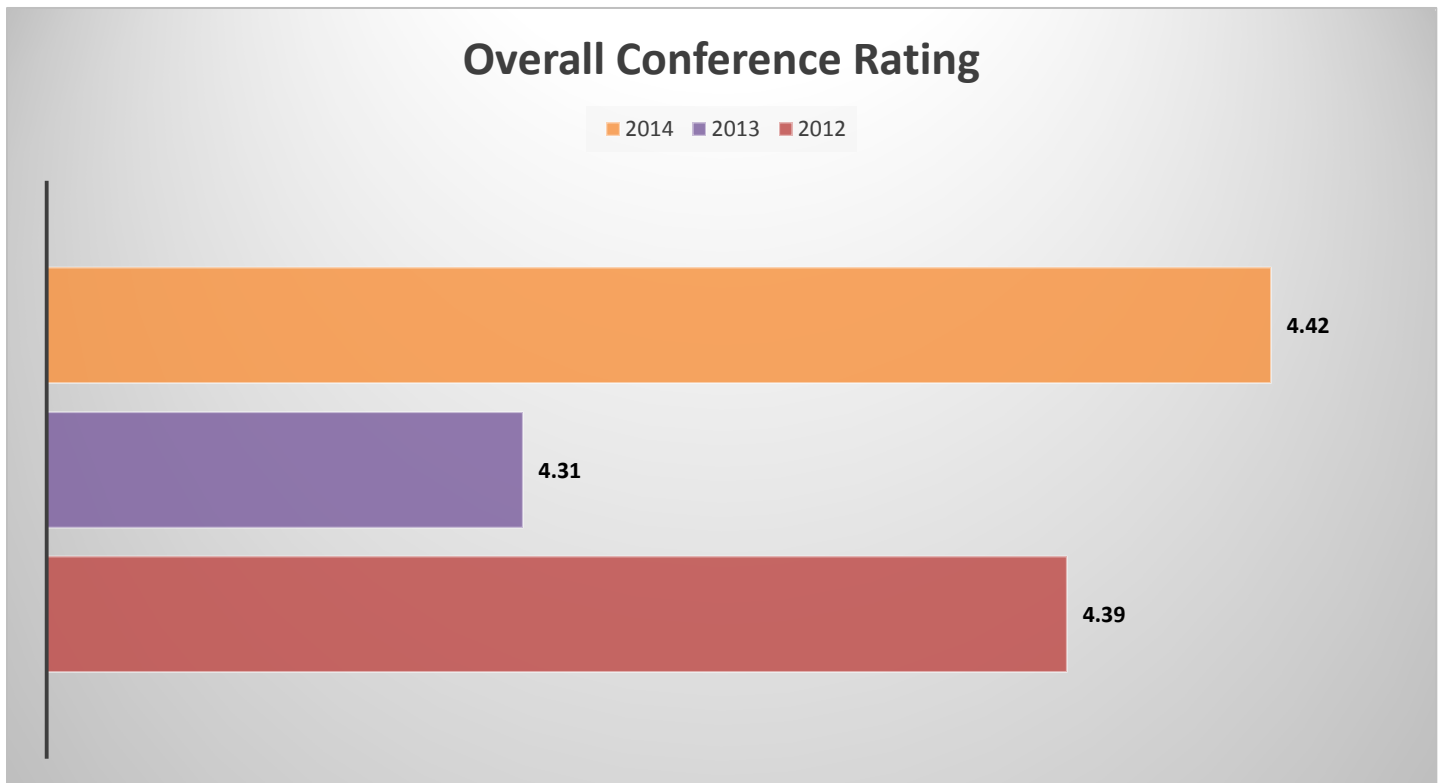
lightning talks. Other events included an opening  
reception, first-timers reception, informal discussion  
groups, and a vendor expo.

#### CONFERENCE RATING

##### Overall Conference Rating

In total, 152 surveys were submitted from 346  
conference attendees. This 44% response rate is a  
significant drop from the 68% response rate for 2013.  
Survey respondents could enter a name and email  
address for a chance to win a \$50 gift card. Jeff Kuskie  
from the University of Nebraska at Omaha was the  
winner.

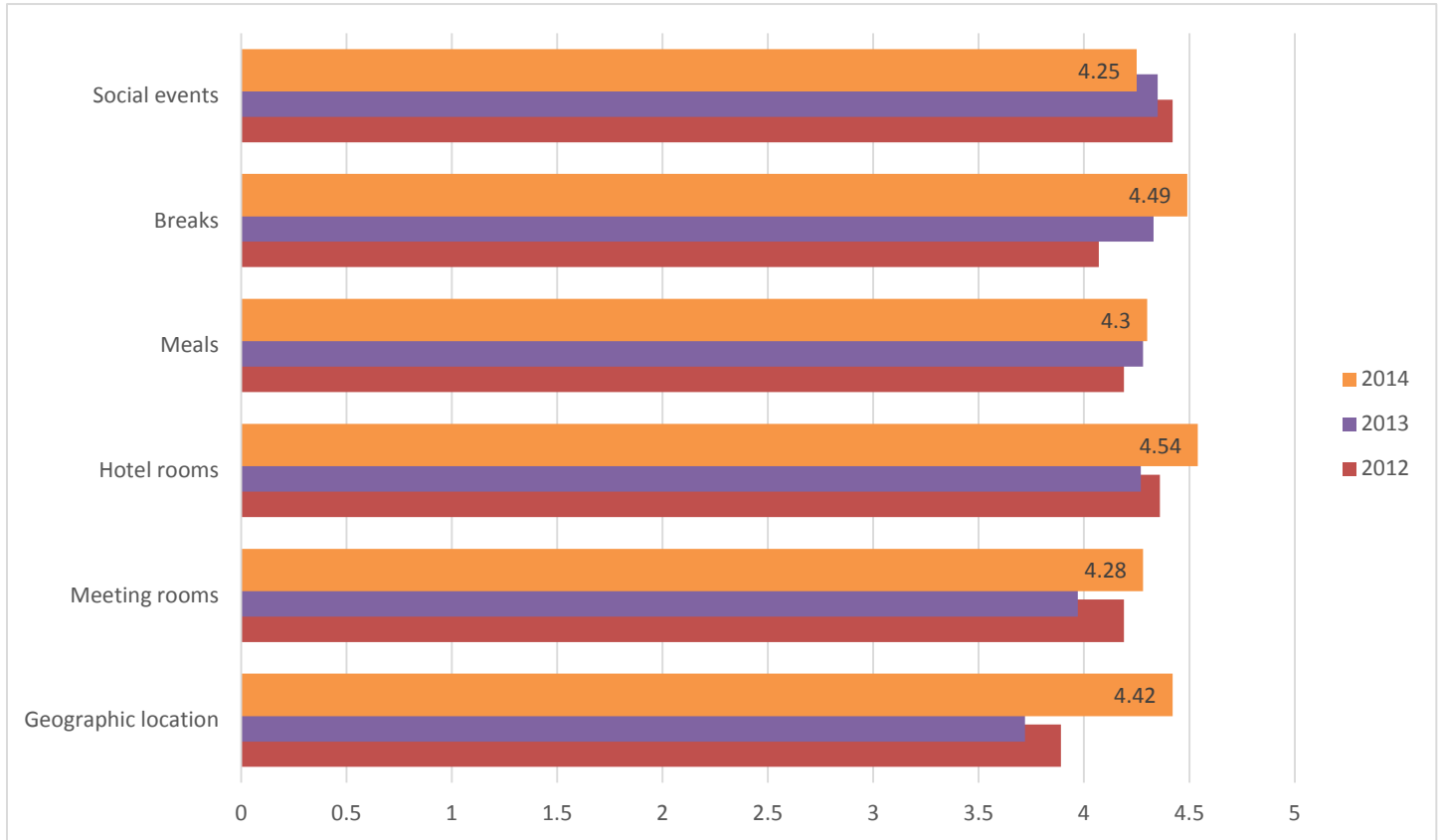
Below is a summary of the survey results.





Respondents were asked to give ratings on a Likert scale of one to five, with five being the highest. The overall rating of the 2014 conference was 4.42. This is higher than both 2013 (4.31) and 2012 (4.39).

### Facilities and Local Arrangements



All ratings for the 2014 conference were higher than 2013, except social events. The geographic location question saw the highest jump. The 2014 rating was 4.42, while Buffalo saw a rating of 3.72 and Nashville a rating of 3.89.

Fifty-one comments were entered on the survey about local arrangements and facilities, some of which touched on multiple issues. Issues with HVAC and wireless access were noted. Many compliments were received on the hotel and Ft. Worth in general. Some expressed displeasure with the shuttle services. The abundance of food available at breaks was commented on by several, some in a positive light, while others would have liked to see less food.

Comments about the meeting rooms were generally positive, mostly focusing on the tables being available for those who wished to type during sessions. Multiple commenters did ask that speakers remember to use microphones in the room to aid attendees' ability to hear adequately

A total of 71% of survey respondents brought a laptop or a tablet to the conference. Many commented on whether wireless access in the meeting rooms was a necessity. Some thought that as long as it was available in the rooms, paying for connectivity in the meeting rooms was not necessary. Others, however, stated that wireless access in the meeting rooms was such a necessity, it should not even be a survey question.

## **Website, Blog and Schedule**

The majority of survey respondents (123) thought the program's layout and explanation were easy to understand. The Sched online program received both praise and complaints in the comments. The conference website received high marks at 4.17. The conference blog was rated less highly at 3.68. Many of the commenters did not know that a conference blog was available.

## **Pre-Conferences**

Three pre-conferences were offered at the 29<sup>th</sup> annual conference. Ratings ranged from 3.82 to 4.78. Comments were generally positive. A few participants cited technical difficulties.

## **Vision Sessions**

Three vision sessions were a part of the 2014 conference. All were highly rated, ranging from 4.16 to 4.48. One commenter went so far as to say, "The vision sessions were my favorite part of the conference. They were all excellent and timely." Katherine Skinner's high energy was noted in several comments. The topical interest of her talk was questioned by some, while others noted that it was nice to receive new information. Herbert Van de Sompel's session was thought-provoking to many. Comments on Jenica Rogers' session were mixed; several praised it, while other were not as impressed.

## **Other Sessions**

NASIG offered thirty-six concurrent sessions during the 29<sup>th</sup> annual conference. Twenty-eight of those (78%) received an overall rating of 4.0 or higher. The number of sessions offered was higher than in Buffalo. Most comments were positive, or offered specific, constructive criticism of an individual session. Feedback was shared with presenters upon request.

2014 marked the second year of the "Great Ideas Showcase," formerly called poster sessions. While

seventeen participated in 2013, there were only four in 2014. Commenters noted that space and timing were not ideal for this type of session. There were also comments about posters, or the "Great Ideas Showcase" being a good thing to continue for those starting out in the profession. Comments indicated that there was confusion over this session and the snapshot session.

The 29<sup>th</sup> conference was the first to offer snapshot sessions, "designed for 5-7 minute talks in which projects, workflows, or ideas are presented." There were four participants, none of whom were rated 4.0 or higher. Due to an oversight by the Evaluation & Assessment Committee, there was no comment box for the snapshot sessions.

Another new type of session for 2014 was the vendor lightning talks. 81% of survey respondents would like to see them continue; the overall rating was 3.89. Comments were mostly positive. Suggestions were offered through the comments to open the session up to more vendors, move the timing, and structure the session around a theme.

The survey requested that responders rate and comment on ideas for future programming. Comments were entered with general and specific ideas for concurrent, preconference and vision sessions. A detailed summary of feedback has been submitted to the board.

## **Events**

The first-timers reception received a rating of 3.98. An overwhelming 89% would like to see this event continue. Comments submitted about the event ranged from gratitude for allowing newcomers a chance to connect with other conference attendees to complaints about location and timing.

There were ten information discussion groups, one of which was added on-site, and therefore not included in the survey. Seven groups received a rating of 4.0 or higher. Requests for other types of discussion groups

were submitted via the comments as well as feedback that one leader did not arrive.

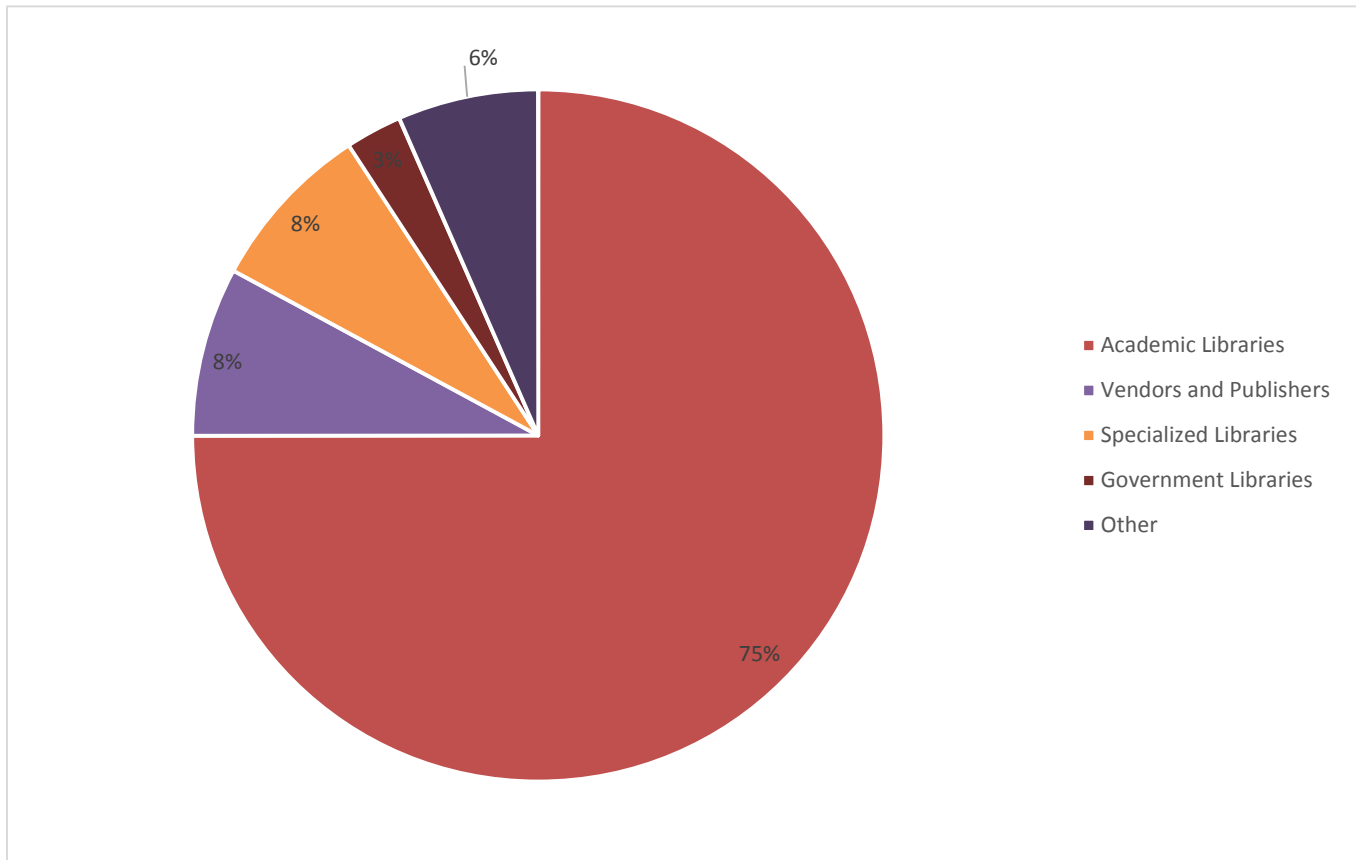
Comments on the business meeting were varied. Many were thankful for a short meeting, while others requested that a more substantive agenda be prepared for the annual conference.

The vendor expo is another event that the majority of survey respondents (88%) would like to see continue. Several comments were received about the timing of

the event. Many think it should be scheduled later in the conference as several missed it this year due to travel schedules. There were also suggestions that the vendor expo be coupled with the vendor lightning talks.

The dine-arounds did not have a specific section on the 2014 conference survey. They were, however, mentioned several times in the comments as a positive way for conference attendees to socialize.

### Respondent Demographics<sup>1</sup>



<sup>1</sup> To ease the reading of the demographic chart, several categories offered on the survey were condensed:  
Academic libraries contains: College Library, University Library

Vendors and Publishers contains: Automated Systems Vendor, Binder, Book Vendor, Database Provider, Publisher, Subscription Vendor or Agency

Specialized Libraries contains: Law Library, Medical Library, Special or Corporate Library  
Government Libraries contains: Government, National, or State Library

Others contains: Public Library, Student, Other  
Several other categories were available, but not selected by a survey respondent.

As in previous surveys, academic library employees continue to represent the largest group of respondents at 75%. This is the same percentage held by academic libraries for the 2013 conference.

Respondents were asked to “describe your work” using as many of the twenty-three given choices as necessary (including “other”). The 2014 conference marks the first year that “electronic resources librarian” garnered the highest number of responses (72). Serials librarian (64), acquisitions librarian (47), catalog/metadata librarian (39), and collection development librarian (32) round out the top five responses.

When asked about the number of years of serials related experience, “more than 20 years” received the majority, at forty-five responses. Thirty-four respondents have 11-20 years of experience with serials. It is interesting to note that the years of experience does not necessarily translate to comparable experience with NASIG. Ninety-three respondents (61%) have been to five or fewer NASIG conferences.

### **Report on the 2014 NASIG Award Winners**

Dana Whitmire, Awards & Recognition Chair  
and Megan Kilb, Awards & Recognition Vice-Chair

During the 2014 conference in Fort Worth, the Awards & Recognition Committee presented the following awards: Fritz Swartz Serials Scholarship; John Riddick Student Grant; Serials Specialist Award; Horizon Award; Rose Robischon Scholarship; and the John Merriman Joint NASIG/UKSG Award.

As with past years, all awards winners were asked to complete a survey after NASIG conference. The committee asks for comments, suggestions, and any feedback the current award winners are willing to share. The responses to the Awards & Recognition Committee survey are included below.

### **2014 NASIG Award Winners Survey**

Conducted by Michael Arthur

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

- Attending this conference is very important because students have different opportunities. Students can: 1) have a chance to talk to different serial/e-resources librarians (how they obtained their current positions, what kind of backgrounds they had had before their current jobs, the responsibilities of their positions, and what kind of qualifications and skills the jobs require); 2) obtain better ideas about how to frame their future career perspectives. The MLIS program does not always teach them practical information while the conference focuses on current issues, challenges, and opportunities; 3) learn about professional services and research activities in support of promotion and tenure requirements.
- It was a worthwhile introduction to all the current issues with serials. It was also a great way to meet other serials people.
- It's the only conference I've been to that gives information specifically tailored to the work we do with ER and serials.
- The quality and variety of sessions makes it worth it. Every attendee is usually an experienced serials librarian so networking is highly beneficial.

#### **How did attending the conference benefit you personally?**

- Before the conference, I was not sure to what extent that I needed to develop my skills to meet the job requirements as a serial/e-resources librarian. The different sessions in the conference gave me the confidence to recognize that my skills are of a high enough quality to serve. However, I need practical experience to transfer my skills to my specific job area.
- I made friends at the conference, and I learned a lot in the sessions.
- Learned new things about stats, etc. and made new contacts
- I took a lot from the vision sessions and from other people I met. It made me be more aware of the issues facing all serialists.

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

- Yes. Since the conference, I have found the area of serial/e-resources very interesting. For example, I would like to know more about the relationship between vendors/publishers and librarians, as well as issues and opportunities that pertain to open access.
- I work mostly with print materials, and the conference made me consider how I might want to work with electronic resources in the future.
- No
- In a way I suppose I considered the possibility of working as an ER librarian or at least collaborating on projects with one.

**What can NASIG and/or the Awards & Recognition Committee do to improve the NASIG Horizon Award program?**

- Librarians with whom I spoke mentioned that they acquired the skills necessary for their positions only after they had been hired. But currently, there is no entry-level position for serial/e-resources librarians. As far as I know, my MLIS program does not encompass direct skills necessary to apply for these positions. Job descriptions include: - Experience with acquisition and management of electronic resources, including E-Resource Management Systems (ERMs); Familiarity with current and emerging content-linking and authentication standards, including: Z39.50, EZProxy. Therefore, I would appreciate the opportunity to take part in hands-on workshops for us to learn more about these areas.
- Everyone was very friendly and approachable. They were able to guide us newcomers very well.

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

- I really enjoyed my conference experience and my mentor kindly and effectively facilitated my experience at the conference.
- It was a great experience! I am very grateful for the award. I can't think of anything that would make it better.

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

- It would be great if NASIG members could visit MLIS programs and provide their presentations.
- Some of the application requirements on the webpage were unclear, so it might be good to review the wording of the applications before next year. I also applied for multiple awards, so I had to fill out a different application for each one; since a lot of the awards have similar requirements, it might be nice to have one application for all the awards (similar to how ALA does it). This might draw a larger pool of applicants.

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

- University of Toronto's iSchool Website
- NASIG's webpage
- I had visited the website and looked for the opportunity.

**Where should NASIG be promoting awards?**

- I have already asked our Dean of the Faculty to post the awards information on its website
- Web page, listservs, twitter
- Listservs
- AUTOCAT, LIS schools, ACRL, ALCTS, OLAC

**29<sup>th</sup> Annual Conference (2014)  
Business Meeting Minutes**

Hilton Fort Worth, Fort Worth, TX  
May 2, 2014

**1. Call to Order**

2013/2014 NASIG Executive Board:

President: Joyce Tenney  
Vice President/President Elect: Steve Kelley  
Past President: Bob Boissy  
Secretary: Shana McDanold (absent)  
Treasurer: Jennifer Arnold  
Treasurer Elect: Beverly Geckle

Members at Large: Chris Brady, Clint Chamberlain, Tim Hagan, Selden Lamoureux, Sarah Sutton, Peter Whiting

Christie Degner was introduced as Parliamentarian.

## **2. Highlights from the Past Year and Report from Board Meeting, Presented by Joyce Tenney**

Tenney opened the meeting with a moment of silence in memory of Birdie MacLennan, long time NASIG member. The Executive Board has charged the Awards & Recognition with developing an award in honor of Birdie MacLennan. This award would focus on electronic resource management qualifications. The 2014 *NASIG Proceedings* will be dedicated the memory of Birdie.

In conjunction with the 30<sup>th</sup> Anniversary of NASIG, the annual conference next year will offer a day of joint programming with the Society for Scholarly Publishing.

Also, a task force has been appointed to plan various anniversary activities at that conference, May 27-30, 2015 in Washington DC.

As with all strong organizations, turning thirty is a time for review and reflection. The Executive Board has had several discussions on the long term vision and mission of NASIG. In order to facilitate a broader discussion within the organization of these issues, a Vision & Mission Task Force has been appointed to offer a roadmap for discussion on this. This task force is chaired by former NASIG President, Steve Oberg, and draws on several past NASIG Presidents, and others who have been affiliated with NASIG. More information on this will be relayed to the membership, as their discussions progress.

Many committees were very active this year. Thanks to all for their hard work on behalf of NASIG. The Electronic Communications Committee had an especially challenging year and came through a major website and attached management system migration with flying colors. This has offered a fresh and more professional look to the NASIG website. ECC deserves a

huge round of applause for their efforts. In keeping with the changing nature of their activities, ECC has requested a name change to better reflect their current activities. The board approved the request and the new name for this committee is the Communications & Marketing Committee.

The board is continuing discussions on author and speaker contracts and hopes to have additional discussions in the coming year on these issues.

## **3. Treasurer's Report, Presented by Jennifer Arnold**

Arnold reported that NASIG finances continue to be healthy, and the investment account has again made moderate gains over the past year. Webinars continue to be well-attended and provide NASIG with an additional source of revenue. Conference attendance and membership numbers are stable.

As of this meeting, NASIG total liabilities and equity is \$535,282.27; as a comparison to last year at this time NASIG total liabilities and equity was \$530,512.14. Finances for the 2014 conference look positive. Total sponsorships for the conference totaled \$24,700.00, and we have ten Organizational Members for a total of \$15,000. Thanks to all of our sponsors for their support!

Committee expenditures are under budget estimates at this point in the year. Revenue from our two webinars totaled \$4,075.00. Thanks to the Continuing Education Committee for managing these programs.

## **4. Introduction to the 2014/2014 NASIG Executive Board, Presented by Danielle Williams (Nominations & Elections Committee)**

Williams introduced new incoming members the 2014/2015 NASIG Executive Board:

Vice President/President Elect: Carol-Ann Borchert

Members- At-Large: Eugenia, Beh, Maria Collins, Wendy Robertson

## 5. Recognition of Outgoing Committee Chairs & Outgoing Board Members, Presented by Leigh Ann DePope & Dana Whitmire (Awards & Recognition Committee)

DePope and Whitmire thanked the outgoing board members for their service on the NASIG Executive Board:

Past President: Bob Boissy

Treasurer: Jennifer Arnold

Members-At-Large: Chris Brady, Tim Hagan, Selden Lamoureux

DePope and Whitmire recognized the following outgoing committee chairs for their outstanding service:

Archives, Photo Historian: Deberah England

Awards & Recognition: Leigh Ann DePope

Bylaws: Sharon Scott

Conference Planning: Michael Hanson, Janice Lindquist

Continuing Education: Todd Enoch

Database & Directory: Alice Rhoades

Evaluation & Assessment: Jennifer Leffler

Electronic Communications: Carol Ann Borchert,  
Kathryn Wesley

Financial Development: Rob Van Rennes

Membership Development: Pat Adams

Mentoring: Danielle Williams

*Newsletter*: Angela Dresselhaus

Nominations & Elections: Kevin Furniss

*Proceedings*: Sara Bahnmaier

Program Planning: Kelli Getz

Student Outreach: Kate Seago

## 6. Call for Old Business

None

## 7. Call for New Business

None

There was no additional business.

The meeting was adjourned at 12:25pm.

Respectfully submitted by:

Joyce Tenney

NASIG Executive Board

## Conference Reports

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### Preconferences

[Big Deals & Squeaky Wheels](#)

### Vision Sessions

[Critical Moments](#)

[Reaching New Horizons](#)

### Conference Sessions

[10,000 Libraries, 4 Years](#)

[Digital Collections at the Library of Congress](#)

[Actions & Updates on Standards and Best Practices](#)

[E-Only Collection Development Policies for Books](#)

[Converting Your E-Resource Records to RDA](#)

[Core Competencies to the Rescue](#)

[Challenges of E-Serial Management](#)

[The Impact of Reorganization on Staff](#)

[Lassoing the Licensing Beast](#)

[The Licensing Lifecycle](#)

[Meeting the Challenge through Collaboration](#)

[Opportunities beyond E-Resource Management](#)

[ORCID Identifiers](#)

[Personalizing Library Service](#)

[Planning for the Budget-ocalypse](#)

[The Power of Sharing Linked Data](#)

[Database Overlap at the Journal Title Level](#)

[Rounding Up Those Prices](#)

[Taming the Information Frontier](#)

[Techniques for Tracking Perpetual Access](#)

[Global Research Management in the Cloud](#)

[The Unbearable Insecurity of the E-Res. Librarian](#)

## Preconferences

### Big Deals and Squeaky Wheels: Taking Stock of Your Stats

*Angie Rathmel, University of Kansas*

*Lea Currie, University of Kansas*

Reported by Stephanie Viola

This program was a combination of a presentation and a workshop in order to guide electronic resource and/or serials librarians in gathering, standardizing, assessing, and presenting Big Deal usage statistics for making the best possible collection development decisions in the face of increasing costs and decreasing budgets.

Approximately twenty-five attendees came prepared with laptops and/or tablets. The speakers began with a brief history and literature review of libraries' experiences with Big Deals, including studies done by various university libraries in the first decade of the twenty-first century. Libraries that cancelled Big Deals were able to lower their costs and remove low use journal titles from their collections without any major increases in interlibrary loan (ILL) spending. The disadvantages found in cancelling Big Deals included increases in a-la-carte prices and/or low representation of discipline-specific content, which created difficulties at some institutions in attaining accreditation.

The presentation continued with a look at University of Kansas' (KU) demographics and a discussion of recent assessment activities there related to collection development strategies. Collection assessment data at KU includes COUNTER-compliant usage statistics for electronic journals, information stored in the electronic resource management system (ERMS) and integrated library system (ILS), and turnaway statistics. Excel spreadsheets are used for processing and data dissemination.

The presenters reported on their own study at KU concerning two of their Big Deals. Using both usage statistics and pricing data, they were able to create a forecast of spending for their Springer and Wiley packages. They used this information to compare the cost of their current Big Deals with keeping only the regularly used titles and fulfilling ILL requests for the cancelled titles. They found that breaking up the Big Deals would result in steep price increases over a period of five years; however, keeping the Big Deals in place would mean a much more gradual increase over the same period. The presenters noted that this may have been largely due to the high use rate of KU's Wiley package – 98% of all titles in the package received some use over the past two and a half years.

The program then changed its focus to hands-on practice with forecasting. Attendees were provided with two spreadsheets. The first was a visualization example where usage data could be transformed into graphs to easily share findings with administrators. Unfortunately, the spreadsheet failed to appear on the projector, so attendees could not perform the exercise during the session. The presenters, did, however, include an example in their slides.

The second spreadsheet was an example of downloaded usage statistics that needed to be normalized, processed, and analyzed to perform forecasting for various scenarios. Again, the spreadsheet was not able to be displayed, but, with the help of formulas from the presentation slides and one-on-one assistance from the presenters, attendees were able to work through the exercise. The results were a forecast of spending for the next four years on both Big Deal package subscriptions and related ILL costs for five scenarios:

1. Keeping the Big Deal in place
2. Cut journals with less than 200 uses at 1% ILL borrowing
3. Cut journals with less than 100 uses at 1% ILL borrowing
4. Cut journals with less than 200 uses at 10% ILL borrowing



5. Cut journals with less than 100 uses at 10% ILL borrowing

A cancellation scenario based on cost-per-use was also discussed, but not presented.

The exercise proved difficult, but useful, in projecting costs and providing decision-makers with meaningful data. Small mistakes in calculations or formulas will result in incorrect data, as demonstrated in the spreadsheets provided by the presenters. After the session, a new, corrected, and completed spreadsheet was provided to the attendees.

The major takeaways from this preconference were that usage statistics can be made more meaningful when analyzed and used for forecasting, as well as the very good advice to adapt the presentation of Big Deal usage information to each unique audience.

## Vision Sessions

### Critical Moments: Chance, Choice and Change in Scholarly Publishing

*Dr. Katherine Skinner, Educopia Institute*

Reported by Esta Tovstiadi

The opening vision session focused on how chance, choice, and change can guide information professionals in transforming the current scholarly publishing landscape into one that is beneficial for all stakeholders. Skinner began the session with a discussion of the current information landscape, focusing on a number of “field formation principles” that emerge during times of change. The first principle was to “Beware changes in the modes of communication,” because this often leads to the formation of new fields. As an example, she discussed how printed communication, made possible by the invention of the printing press, drastically changed society.

The second principle she discussed was that “Innovations don’t come from the center; they come

from unexpected locations.” To illustrate this point, she discussed the phonograph, a technology that became less popular in the United States after the radio became common, and the Great Depression made it more difficult for individuals to purchase records. However, thanks to the jukebox, this technology made a comeback. Additionally, the jukebox featured more African-American music which brought “new voices into the national conversation.”

Finally, the last field formation principle discussed was that “Cultural processes of production, distribution, and reception depend upon networks of people.” She elaborated on this by using the example of Barcelona castellers (human towers) who rely on “closely integrated chains of interdependence.”

Skinner then discussed how the internet has revolutionized communication in modern times, creating more challenges, opportunities, and innovation in scholarly publishing. She stressed the importance of engaging all stakeholders, aligning key players, and connecting systems and communities in order to continue to support and sustain access to scholarship. She asserted that scholarly publishing is currently in a “crisis mode,” where chance and choice matter, and encouraged all stakeholders to make choices that support the values of everyone involved in scholarly publishing.

Skinner concluded with several ways in which we can make changes to the current system. She noted the opportunities offered by library publishing, and highlighted the work of the Library Publishing Coalition’s [Library Publishing Directory](#) as an example of growing support for this. Additionally, she challenged librarians to play a more strategic role in web archiving and preservation of all content, noting that current mechanisms in place are insufficient for capturing the scholarly record. Another possibility discussed for changing the current system was exploring and participating in innovative open access funding models, such as Knowledge Unlatched.

Questions from the audience included how to address the controversy of open access in regards to the tenure process; the role consortia might play in changing the scholarly publishing landscape; the relationship between library presses and university presses; and how the library community might coordinate large-scale web archiving projects.

## **Reaching New Horizons: Gathering the Resources Librarians Need to Make Hard Decisions**

*Jenica Rogers, State University of New York at Potsdam*

Reported by E. Gaele Gillespie

Rogers began her presentation with a quote she has heard from numerous librarians – “I could never do what you did,” in reference to her institution’s decision to cancel their American Chemical Society package (and “several other things [she’s] done in [her] career”). She asserted that anyone can do what she did, and that librarians as a community need to work together to bring about bold, thoughtful change.

Rogers noted that the ability to make hard decisions with confidence requires knowing both yourself and your environment. Several components of one’s environment to be aware of include the technology horizon, user needs, changes in publishing and scholarly communication, and trends in higher education. She reiterated that knowing who you are and being confident in yourself and your goals is fundamental to taking the first steps towards making the hard decisions that need to be made.

Once environmental, personal, and professional frameworks have been defined and detailed, the next step to bringing about change is to consider all resources available. Specific advice included:

- Hold on to your capital, including your expertise and authority.

Claim and demonstrate your expertise and authority. Pay attention to your demeanor, your presence, your

sense of humor, your passion for scholarship, and your conversations. You can draw on all of this later. You need a reputation that will allow others to believe in you.

- Gather data.

Be the expert on your problem. Knowledge is power, and facts are ammunition. You must be able to back up your assertions with solid data.

- Make friends.

Other people are also important resources. Make friends. Such friends can include faculty, vendors, administrators, other librarians – not only at your own library, but also at other libraries. It helps to connect with people, and build friendships as a support system.

Rogers then moved on to tactics for bringing about thoughtful change. Specific tactics included:

- Start immediately.

There is no such thing as too early, but too late is real, and it can have a negative effect on all that you’ve carefully constructed. Usually when people say they cannot do a particular thing, they mean they can’t do this yet. It takes a conscious effort, consistency, and thoughtful steps to lay out your tactics.

- Find common ground.

Where do your issues touch your allies’ issues in meaningful ways? To find out, ask questions about what they do and what matters to them. Compare their responses with what matters to you, and find the places they intersect.

- Communicate effectively.

Knowing yourself and knowing how to approach a person is important, as is how to do the talking. Having said that, realize that finding and approaching the right

person is more important than the tactic. Always remember to keep the medium and the audience in sync. Find a way to resonate with the audience you're speaking to.

Rogers noted that any actions taken will produce reactions, and that how one reacts is important. She recommended that the audience embrace serendipity and be prepared to be surprised, and to respond well, and with compassionate, reasonable, knowledgeable decisions. She also advised that change requires us to evolve, even though it can be uncomfortable and unexpected. She emphasized that change needs to be based on the local community, the local climate and environment, and local goals. The more or the bigger the changes, the more important it is to be ready.

Rogers' final advice was to release fear. She noted that fear does not enable smart decisions – it supports safe decisions. She reiterated that her decisions are based on what is in the best interest of her library within her community, and nothing else. She concluded her presentation stating that there are no easy choices, but it's almost always worth making the hard decisions. As Mahatma Gandhi said, "Be the change you want to see in the world."

## Conference Sessions

### 10,000 Libraries, 4 Years: A Large Scale Study of Ebook Usage and How You Can Use the Data to Move Forward

*Michael Levine-Clark, University of Denver*  
*Kari Paulson, ProQuest*

Reported by Marsha Seamans

Paulson was charged with merging EBL and ebrary at ProQuest and brought Levine-Clark in to analyze the available usage data. Levine-Clark's analysis differs from previous research on this topic in that the data being analyzed for this presentation looked at worldwide

usage in 2013, across academic, public, and special libraries.

The study includes approximately 270,000 ebrary titles and 406,000 EBL titles, with ebrary having a larger percentage of titles in the arts and humanities, and EBL a larger percentage in the social sciences. Levine-Clark pointed out that some aspects of the ebrary and EBL packages are not comparable, such as the size of the collections; variations in title availability; and platform differences.

This presentation focused on usage in academic libraries. Analysis of the usage data sought to provide answers to whether libraries are collecting the right material; whether the quality of the resource matters; if there are there patterns of use related to subject and/or discipline; and if those patterns can help us improve our collections and services.

A variety of graphs were presented to try to answer these questions. Several were used to compare the availability of e-books within specific disciplines to the use (e.g. sessions) of the e-books within those disciplines. To assess whether the quality of an e-book mattered, the data was analyzed using the criteria of the publisher being a university press. The study also looked at intensive versus extensive use (breadth versus depth) by looking at the percentage of titles used within subject areas compared to the average length of time spent in a single session.

A number of conclusions were presented from the current study:

- Quality matters—university press titles were used more heavily than the overall collection.
- Social sciences outperform humanities and STEM titles in percentage of e-books used and average amount of use.
- STEM books show more actions per session
- E-books in the humanities show longer session lengths. There are clear, but nuanced differences by subject. For example, users spend the most time using

history e-books while users view a lot of pages in technology e-books in a short amount of time.

Levine-Clark will soon be publishing a white paper that will include the data presented at this session along with additional data that will help answer the question of how we use the observational data to build better collections and provide better service. The white paper will be available on the EBL and ebrary websites.

## **Acquisition and Management of Digital Collections at the Library of Congress**

*Ted Westervelt, Library of Congress*

Reported by Linh Chang

This presentation gave an overview of what the Library of Congress (LC) has done, and is currently doing, with its digital resources. The Library's mission with regard to developing digital content deals primarily with custodial collections. (Custodial collections are materials for which the library is taking on curatorial responsibility; they are not licensed databases, subscription resources, or content that the library has digitized from print sources.)

Westervelt began by talking about the different methods the Library of Congress uses in acquiring digital resources for its collections, including through the library's transfer services from other agencies and organizations. The largest component of this cooperative program is the [National Digital Newspapers Project](#). Web archiving is another means for the Library to add digital resources to its collections. In addition, updated copyright deposit regulations include online-only serials, so the Library now automatically collects these e-serials. Through a related program, the Library collects e-books as well. The [Cataloging in Publication Program](#) is another way for the Library to acquire digital content. Finally, the Library of Congress also purchases digital resources from various publishers, and receives a large volume of gifts in digital format.

Westervelt then discussed the volume of the digital resources the Library acquires from these different sources. Through the library partnership transfer services, there are currently 116 million unique files, consisting of 274 petabytes of content. This content is growing at fifteen terabytes per day. Through web archiving, the Library has collected 8.6 billion files of 534 terabytes.

To accomplish large-scale acquisition and maintenance of its digital resources, the library's original approach was to start slowly, and to focus on the first steps in getting digital content into the library. The very first step was to identify what was out there. Westervelt emphasized the importance of initially identifying the intellectual content of resources, discovering the best place from which to get the content, and also of obtaining the right type of file format.

Next, Westervelt introduced the document "[Recommended Format Specifications](#)." It provides recommended file formats best suited for preservation and for long-term access. The goal of this document is to provide some parameters and standards for the greater community, especially libraries and vendors, to consider so that contents can more easily be preserved and accessed long term.

The presenter also identified a suite of tools that play a key role in preserving and managing incoming digital content, including the integrated library system, the Electronic Copyright Office (ECO), and Bagger, which ensures the safe transfer of digital contents. Another product, Digiboard, manages licenses for web archiving. Content Transfer Services is an inventory management tool that stores all of the Library's digital content and tracks it. Delivery Management Services was developed for e-serials that the Library of Congress receives under copyright, and allows staff to input serials metadata, such as volume, issue, article, and author. In addition, the Library now has a central inventory tool to track what has been received and provide metadata links to the content, which allows patrons to access it.

The Library is currently tackling issues resulting from providing access to patrons. There are many unanswered questions about rights access for digital content. However, despite some of these unanswered questions, Westervelt thinks the Library of Congress is in a good position to bring in digital content and to add it to the collection.

In addition to problems associated with developing and maintaining the digital repository and providing access, Westervelt talked about the complex issues the Library needs to work on with digital resources generally, including developing a digital collection with breadth and depth across all subjects and formats, and a better collection development policy to maintain the continuity of the collection, whether it's print or online. Westervelt also strongly advocated for the use of automated workflows which should provide greater efficiency and allow staff to work on difficult materials or formats that require manual processing.

The presenter offered some great tips and sound advice for any library starting a digital collection or getting further involved in digital collecting. First and foremost, the library needs to define its mission in digital collecting. At the Library of Congress, its mandate in digital collecting is set as broadly as possible to ensure the inclusion of various subjects across the board.

Westervelt also noted that librarians need to define their role in the digital process. Developing new relationships with others in different departments is a must and librarians in their new role need to be prepared to be heavily involved with people working in technology. He advised librarians to work within the basic workflows and to integrate new tasks with existing ones. He also warned that one should expect complications and tight resources. However, he feels his experience in informing management regarding his projects has been very positive, especially as it helps them to make better-informed decisions.

In order to succeed, the presenter advises that librarians need to cooperate better and to learn from experience so that we can educate each other. More

importantly, we need to become more efficient. For example, he suggests that we try not to reinvent the wheel when it comes to digital collections, but to build on the existing tools and workflows. Lastly, he urged the audience to focus on integrating everything, including workflows and systems, and to standardize formats, workflows and tools, while leaving room for needed variations in your own situation.

## **Actions and Updates on the Standards and Best Practices Front**

*Nettie Lagace, NISO  
Laurie Kaplan, ProQuest*

Reported by Stephanie Viola

Lagace began the presentation with an explanation of how ideas become either standards or best practices. NISO's major goals with regards to published standards or best practices are to facilitate commerce, reduce costs, and support integration. Around 95% of the projects that NISO works on are recommended practices and are often for emerging topics. These differ from standards, as their adoption is not compulsory and the rules surrounding them are more lenient.

Ideas or reported problems are documented as a work item that is referred to a NISO committee. Voting members approve or deny the work item for further action. For approved work items, a NISO working group is created to perform interviews, and conduct surveys and discussions. Next, draft proposals are created and the community submits comments. The working group then responds to those comments. This process can take a long time. After those steps, the recommended practice is published. Then, a NISO standing committee is created to ensure the practice is being adopted and remains relevant.

The speakers then discussed four current projects – KBART, PIE-J, ODI, and OAMI.

KBART – Knowledge Bases and Related Tools  
Recommended Practice – The second phase (Phase II) was published in March 2014. KBART aims to eliminate problems with the OpenURL protocol by offering a standard metadata exchange format. Phase II incorporates file fields for the identification of open access metadata, as well as e-book and conference proceeding metadata. It also recommends that purchased packages via consortia be identified as such in the file names and/or knowledge base entries. Publishers have six months to become KBART Phase II compliant.

PIE-J – The Presentation & Identification of E-Journals  
Recommended Practice – This became a recommended practice in March 2013. PIE-J addresses the clarity of information related to electronic journals, such as recommending that the e-journal's ISSN be listed somewhere on the website. The published document includes many real-world, positive examples of clarity in e-journal presentation. The PIE-J Standing Committee has created a template letter that librarians can use to contact vendors or publishers who are not in compliance with PIE-J  
([http://www.niso.org/apps/group\\_public/document.php?document\\_id=12536](http://www.niso.org/apps/group_public/document.php?document_id=12536)).

ODI – Open Discovery Initiative Recommended Practice– This was in its final stages of approval at the time of the presentation. This initiative was split into subgroups to propose best practices for discovery platform providers to describe what is inside (i.e. full-text v. abstract-only), describe what is being linked, and the exchange of usage data. Upon publication, the document should include simple checklists that libraries can send to providers to gauge compliance.

OAMI – Open Access Metadata and Indicators – This recommended practice has received the most comments that Lagace had ever seen. The working group will be reviewing the many comments and preparing responses. Open access metadata continues to be a complex issue involving many stakeholders.

## Are We There Yet? Moving to an E-Only Collection Development Policy for Books

*Kate Moore, Indiana University Southeast*

Reported by Mohamed Berray

Moore's presentation gave an extensive overview of the literature on e-preferred collection development policies in libraries through an examination of the current impetus for acquiring e-books, hindrances in adopting e-preferred collections policies, and current library initiatives in line with predicted directions of e-books.

According to the *Ohio-Link-OCLC Collection and Circulation Analysis Project* (2011), 6% of library collections account for 80% of usage. Moving beyond serving as a warehouse for books, libraries have transformed themselves into collaborative learning spaces, not defined by the set of materials they hold, but by the mindset of community partnerships and collaboration. E-books have fed into these considerations by limiting the need for shelf space in libraries, and have allowed libraries to reinvent their spaces in ways that facilitate teaching and learning. According to the *Wiley's 2013 Librarian Survey* key findings, 26% of current book collections in libraries are digital, and although spending on print books still exceeds digital, expenditures on the two material formats are expected to be even in three years' time.

E-books also provide remote access and ready availability of library books, which support the upsurge of online education. *ACRL'S Standards for Distance Learning Library Services* (2008) compels libraries to ensure that the distance-learning community has access to library materials equivalent to those provided in traditional settings. At Indiana University Southeast alone, the percentage of students taking an online course has grown from 1.9% in fall 2012 to 7.8% in spring 2014, and there are now sixteen fully online degree programs offered through the Indiana University system.

## Converting Your E-Resource Records to RDA

*Richard Guajardo, University of Houston*

Reported by R. Lundberg

Richard Guajardo detailed the University of Houston's (UH) ambitious RDA implementation project which not only involved the conversion of millions of bibliographic records, but also authority control processing for a more user-friendly catalog. Both vendor and in-house solutions were used to convert and clean up data. The project removed the general material designator (GMD) and replaced them with customized content type, media type, and carrier type (CMC) fields in bibliographic records. It also created a new suite of material type icons for the discover layer.

Librarians laid the groundwork for the RDA conversion by cleaning up data (OCLC Number Match Project); configuring load tables for new RDA fields; installing automatic authority control processing to automatically update access points when name authorities were updated; and implementing material type changes to replace the GMD. Also, UH had a task force for mapping material types. The task force consulted with the RDA implementation team and the OPAC Advisory Group. Guajardo said that this evaluation paid off because materials type codes (BCODE2) directly related to CMC fields which were used by the vendor in the conversion.

They outsourced the machine RDA hybridization of about 2 million records of physical materials, databases, electronic government documents, and electronic music scores to MARCIVE. The process, from grappling with the important "tax return" style profiling form, to loading the tested converted records into the ILS was very rapid and time-consuming. Guajardo reported that the MARCIVE conversion service changed as many of the data elements as possible using machine changes based on best practices. By combining RDA conversion and authority processing, UH paid one time per title.

Due to cost and the source of records, e-books and e-journals records were converted (hybridized) in-house

Notwithstanding all of the above, surveys about the use and preference of e-books indicate that print books are still preferred over their online counterparts. User preferences vary by book type (e-course reserve books are popular), subject (business and law students tend to prefer e-books the most), age of the user, and the purpose for which the book is used. According to a [Voxburner survey](#) in the United Kingdom, 62% of 16 to 24-year-olds prefer print books over e-books. Users in this age group noted that they have difficulty in retaining information read on a screen, and face multiple distractions while using an e-book on a portable device. E-books are also mainly used for quick perusals compared to print books. A [JISC study](#) found that 85% of e-book users spend less than a minute per page, and only 5.5% students have read an entire book online.

There are other issues associated with e-books, such as restrictive DRM, insufficient ADA compliance, inability or difficulty in downloading to multiple devices, limited functionality of the user interface, privacy concerns, lack of front file titles on aggregator platforms, and lack of preservation to ensure continual access to purchased materials. Libraries and publishers have adopted varying business models to suit their budget and user needs as well as their preference for vendor/publisher platform.

Moore concluded with items that should be addressed in an e-preferred collection development policy, including a discussion whether duplication with print resources is acceptable, guidelines for weeding, and whether the library will activate and provide access to open access e-book collections. While there is no universally accepted best practice for e-book collection development, having an e-book collection development policy in effect can assist with handling the changing landscape of books.

via global updates. Load tables were also used post conversion to insert RDA fields (e.g., 040 \$e, CMC fields) and replace abbreviations. In addition, the ILS vendor created customized material-type icons. They were able to reuse icons and change background colors to create new icons covering their range of material types including DVDs and Blu-ray.

Conversion work has culminated in bibliographic records with fewer abbreviations, more consistent access points, and customized icons for RDA material types.

UH has completed their elaborate plan, which also coincided with migrating to a new ILS. Guajardo remarked that keys to a successful conversion included ILS configuration, local policy, training, and communication of changes in the catalog and the system as project tasks were implemented. Guajardo also presented some of the challenges which can help librarians decide if this level of conversion is a must, or something to add to their wish list.

Richard Guajardo's slides are available on SlideShare and he also gave a presentation on RDA implementation at ALA 2013 (<http://home.marcive.com/wp-content/uploads/2010/08/ALA2013-RDA-Guajardo-Final.ppt>)

### **Core Competencies to the Rescue: Taking Stock and Protecting Institutional Knowledge**

*Paula Sullenger, Auburn University  
Shade Aladebumoye, Auburn University  
Nadine Ellero, Auburn University*

Reported by Susan Boone

After Auburn University Library's Electronic Resources and Serials Services Department Head, Paula Sullenger, reviewed *NASIG's Core Competencies for Electronic Resources Librarians*, she recognized an opportunity to review and implement her long-standing goal of a systematic coverage of operational tasks. Technical services staff had been reduced by 40% through

attrition, which left the department at risk for gaps in the necessary skills and background to effectively run their operations. Their department is comprised of a staff of four with very specialized knowledge, and initially no policies and procedures manual. The ultimate goal for the department is to have at least two people able to perform every task—a primary person and one to serve as backup.

In July 2013, the department's staff used the *Core Competencies* as a checklist to self-assess their knowledge of electronic resources management tasks. They ranked their level of understanding of the tasks in the seven different areas: lifecycle of electronic resources (acquisitions/collection development), technology, research and assessment, effective communication, supervising and management, trends and professional development, and personal qualities. Their rating scale for the sets of tasks or competencies associated with each area was weighted from: complete mastery (I can do this task), confident in this task (I could fill in and perform this duty), I understand what this task is (but I wouldn't be able to do it), to Blank (I haven't the slightest idea how to do this task). What emerged was that eighteen of the seventy-four individual competencies were covered by the unit head only. Forty-three tasks were fully covered within the department. The self-assessments verified gaps where skills were under developed or staff members needed more fluency in terminology, tools, or techniques.

Shade Aladebumoye, Library Associate for Serials, had complete mastery of acquisitions processes. Her extensive background with print serials gave her full confidence in those associated tasks. As their \$6,000,000 collections budget edged up to where 85% were electronic resources expenditures, the process of tracking access and maintenance was not as familiar to her. Beginning with troubleshooting access, Aladebumoye took the initiative to learn how to manage access issues in their link resolver. Her confidence grew through putting her observation of helpline responses and some basic training into practice.



Nadine Ellero, Serials Acquisitions Librarian, had extensive experience in standards and NISO which gave her complete mastery of the link resolver, metasearch tools, bibliographic utilities, cataloging, taxonomies, and various aspects of metadata. Her self-assessment identified a need to expand her fluency in acquisitions and licensing. In order to accomplish this, she began to draft flow charts to illustrate local fund accounting structures and workflows. She has also attended training workshops, and is drafting a manual to document the department's processes.

Sullenger mentioned that her staff's skills were stronger than they gave themselves credit for in the first self-assessment. The *Core Competencies* provided a structure and focus for expanding staff knowledge and confidence. The most recent, comprehensive self-assessment completed this March shows positive progress in expanding knowledge of terminology, tools, and techniques. With Sullenger's imminent departure, the library has put a research and assessment team together to address collection development analysis which had been handled by Sullenger, as many of the tasks are best learned by direct experience.

In conclusion, the *Core Competencies* helped facilitate teamwork within the department by setting a framework to discuss and address areas for training and development.

### **Facing Our E-Demons: The Challenges of E-Serial Management at a Large Academic Library**

*Marlene Van Ballegooie, University of Toronto Libraries*  
*Juliya Borie, University of Toronto Libraries*

Reported by Sanjeet Mann

In this session, Marlene Van Ballegooie and Juliya Borie of the University of Toronto Libraries explained how metadata supply chain problems impact academic libraries. They reviewed relevant initiatives and standards, and shared results from their investigation into the accuracy of their knowledge base.

E-resources are the fastest growing segment of University of Toronto Libraries' collections and absorbed 57 percent of their 2012-2013 acquisitions budget. Van Ballegooie and Borie cited research suggesting that [investing in e-resources leads to better support for campus research](#), as long as libraries also [invest in technical infrastructure](#) such as link resolvers or Electronic Resource Management (ERM) systems. To this end, University of Toronto Libraries replaced their home-grown ERMS with the full Serials Solutions suite of discovery and management tools in 2011, and established the E-Resource Management Group (ERMG) in 2013 to collaboratively manage e-resources. These changes are resulting in stronger and simpler workflows, bringing a wider range of staff into e-resource management, and providing them with easier access to the information they needed.

As e-resources come to dominate library collections, libraries increasingly depend on accurate metadata flows between publishers, knowledge base vendors, and subscription agents. Recently, NISO and UKSG developed initiatives such as KBART, TRANSFER, and PIE-J to address common problems that prevent users from accessing needed content and leave librarians uncertain whether their knowledge bases accurately reflect their subscriptions.

To determine the accuracy of their knowledge base, Van Ballegooie and Borie requested lists of subscribed titles from twenty vendors and compared the titles and access dates against their Serials Solutions holdings. Out of 12,121 total titles, they discovered 1,048 titles from package deals and 52 single-title subscriptions that were not accurately represented in the knowledge base. Many of the missing package titles had not been activated or were missing short runs of access, because those titles had recently ceased, transferred or experienced a title change. Most of the missing single-subscription titles were "comes with", meaning they accompanied a paid subscription title, or were open access titles that the library was not aware of its entitlement.

Van Ballegooie and Borie concluded with recommendations for publishers and librarians. Perpetual access to content requires a perpetual supply of related metadata to knowledge bases and discovery services. Librarians may need to stipulate metadata availability as a condition of signing license agreements – model licenses can help librarians negotiate for these terms. As vendors automate metadata flows, librarians may need to “trust but verify” the accuracy of their metadata, archiving title lists on a shared network drive and taking periodic snapshots of knowledge base holdings. Vendors should fully implement relevant standards and allow librarians to improve the contents of knowledge bases. Publishers who value title lists as more than simply sales and marketing tools could see increased customer retention. Overall, the demons of e-resource management may be legion, but they can be exorcised by a commitment to collaboration and communication.

### **The Impact of Reorganization on Staff: Using the Core Competencies as a Framework for Staff Training and Development**

*Rachel Erb, Colorado State University*

Reported by Rob Van Rennes

Rachel Erb, electronic resources management librarian, related her experiences with reorganizing personnel at Colorado State University. Faced with an increasing emphasis on electronic resources and the departure of several staff members, the library administration realized changes needed to be made to better reflect the current work environment. The process began with the formation of a committee of key library staff who met on a weekly basis to analyze position descriptions and review workflows. By dissecting the operations, members were able to determine whether certain work activities should be continued, merged, or managed with automation. To help foster a sense of transparency and to maintain harmony in the workplace, staff members were invited to participate in the discussions concerning proposed changes. Additional meetings provided the opportunity for individuals who were

directly impacted to express their work preferences which encouraged buy-in.

During the process, one specific library technician position which focused on serials and electronic resources was closely compared with the *NASIG Core Competencies for Electronic Resources Librarians*. After careful study, it was determined that the expected duties associated with the position justified a reclassification to a professional level appointment as many of the activities were above grade.

Once the staff person was hired for the newly envisioned position, a training plan involving formal and informal instruction was arranged. The internal hire had a monographic background so there was a fair amount of new information to absorb including learning the life cycles of electronic resources, licensing, and the department’s role in the acquisitions process. To enhance the training, process maps were used extensively to provide visual assistance to help with understanding the workflows. Frequent meetings were scheduled to provide coaching, support, and encouragement, but the person also learned from a certain amount of hands-on training involving trial and error.

In the end, the reorganization not only resulted in the creation of a more effective staff that was better positioned for the current work environment, but it also led to the merger and restructuring of two library divisions. Staff members now have more flexibility to do a variety of activities and have a better understanding of all of the aspects of library operations as previous boundaries and silos have been knocked down. Although most of the plan has been implemented, ongoing refinement and training, especially in regards to technology, will need to continue in order to achieve the desired long-term success.

## Lassoing the Licensing Beast: How Electronic Resources Librarians Can Build Competency and Advocate for Wrangling Electronic Content Licensing

*Shannon Regan, Mercer University*

Reported by Annette Day

As a starting point, Shannon Regan showed Section 1.2 of NASIG's *Core Competencies for Electronic Resources Librarians*, that specifically addresses licensing. The presenter noted this is the biggest block of text in the competencies, indicating the complexity of licensing and the difficulty of being able to clearly and succinctly articulate the needed skills. She also highlighted a study from 2007 comparing terms used in Library Information Studies (LIS) curriculum and LIS position descriptions, which revealed licensing is frequently mentioned in job descriptions, but not in the LIS curriculum. Her presentation aimed to provide information and resources to help fill this knowledge gap.

Regan's presentation then moved to a list of questions that one may ask during the first day on the job if undertaking licensing. The questions covered learning about the review process, who is authorized to sign licenses, the relationship between the library and campus general counsel, and if there are any specific state or country laws that need to be considered in the license negotiation process. She also recommended shared key texts, model licenses, listservs and training opportunities. These are all collated in a library license toolkit created by the presenter:

<https://sites.google.com/site/librarylicensetoolkit/>

The presenter explained the importance of having the library active in the licensing process through three scenarios. In the first scenario, "Educate to Advocate: Administrators", the presenter described how when first starting in her current position, she learned the administration was skeptical about the library's role in the licensing process. Campus had a general counsel that signed licenses and checked for legal red flags. The

library's role, however, was unclear. There are critical issues for libraries in licensing that general counsel did not notice such as interlibrary loan and perpetual access rights. The presenter had to find a role in the licensing process and illustrate the importance of that role to the general counsel. She began by reviewing each license and creating a memo explaining clauses that were of concern to the library and suggesting changes to the agreement. The general counsel appreciated the efficiency of the memo and began to value the input they received and understand the importance of the library's role in the process.

In the second scenario, "Educate to Advocate: Colleagues", the presenter described being asked to purchase an electronic resource near the end of the year, which meant this needed to be accomplished within a brief amount of time. It was clear to the presenter that her colleagues did not fully understand the complexities of the process and the many parties involved. This gave her the perfect opportunity to educate them on all that is required when purchasing an e-resource and demonstrate it in a real life scenario, which is described in Section 4.3 of the *Core Competencies*.

The final scenario, "Educate to Advocate: Library Users", highlighted the importance of understanding what our users want to do with electronic content and factoring that into purchasing and licensing decisions. The presenter concluded with a description of the day to day realities of being an e-resource librarian. The ability to be flexible and change priorities while maintaining focus on long range goals is an essential quality for success.

## The Licensing Lifecycle: From Negotiation to Compliance

*Eric Hartnett, Texas A&M University*

*Jane Smith, Texas A&M University*

Reported by Tessa Minchew

Hartnett and Smith gave their audience a thorough overview of the current licensing workflow and tools at Texas A&M University Libraries (TAMU), including details about their licensing team, a license terms checklist, the electronic resources management (ERM) system, their approach to breach resolution, and some sample licensing documents. TAMU's electronic resources licensing team was created in 2008 and manages all license negotiations for the University Libraries, and provides support for members involved in unfamiliar or problematic negotiations. Communicating through monthly meetings, shared spreadsheets, and a wiki page, the team consists of eight librarians, seven who process licenses. In fiscal year 2013, the TAMU licensing team processed sixty-two licenses for a wide range of electronic resources.

The license team uses a checklist to ensure that all team members are negotiating standardized terms that are beneficial to the library and its users. While remaining open to negotiation, there are clauses that TAMU cannot accept in any license, such as a requirement to monitor patron use or supply patron records to the licensor upon request, or the stipulation that all materials must be destroyed upon termination of the contract.

Should negotiations fail, TAMU will make notes for their contract administration office and then either subscribe under the unfavorable terms or walk away. While walking away may prompt the vendor to make some concessions, the presenters acknowledged that sometimes TAMU may simply lose access to the resource. The license team has dealt with some issues in recent negotiations, including a vendor who was not honoring a previously negotiated inflation cap, another who wanted a multi-site license for three sites located

on the same campus, and one who would not allow interlibrary loan of a purchased physical item.

After license negotiations are finalized, the contracts are sent on for necessary signatures. The Dean of University Libraries can sign a license for any resource under \$5,000, but purchases over that amount have to be sent to the Contract Administration Office for further negotiations. In addition, the Contract Administration Office must forward contracts for purchases over \$50,000 to the Office of General Counsel for further review.

For management of electronic resources metadata, TAMU uses CORAL, an open source ERMS developed at the University of Notre Dame's Hesburgh Libraries, and the system has been meeting their needs very well. CORAL allows TAMU to store all license documentation in a single place, compare clauses across licenses, and easily isolate licenses that are up for renewal.

In conclusion, the presenters discussed procedures for addressing license breaches. Presently, most breaches involve either excessive or systematic downloading. After receiving notification of a possible violation from a vendor, a license team member will work with the vendor and the libraries' IT department to identify the source of the breach and resolve it as quickly as possible. The audience also offered some interesting examples of recent breaches.

### Meeting the E-Resources Challenge through Collaboration: An OCLC Perspective on Effective Management, Access, and Delivery of Electronic Collections

*Jill Fluvog, OCLC*

*Maria Collins, North Carolina State University*

*Dawn Hale, Johns Hopkins University*

*Andrew Pace, OCLC*

Reported by Marsha Seamans

Fluvog introduced the panel discussion by reporting that by 2020, it is predicted that 80% of academic

library expenditures will be on e-resources, yet 94% of librarians are still relying on spreadsheets to track those resources. Some of the ways in which OCLC is attempting to help manage e-resources is by generating research and reports; short term advisory groups for service introductions; one-on-one publisher relations teams; the Content Provider eQuality Group; and the Electronic Resources Advisory Council. Fluvog referred to an OCLC report, *Meeting the E-Resource Challenge* (2013). OCLC aims to provide services that are shaped, informed, built, and improved by the efforts of their global community.

Collins discussed the challenges of establishing an electronic resource management (ERM) system that is efficient, system-supported, and without silos of data. The challenges she identified included mainstreaming the ERMs, creating workflow-centric design, achieving scale, shifting to a global knowledge base, the need for best practices documentation, doing more with less, supporting local needs, living with siloed ERMs, and industry readiness. Collins stressed the need for global community investment and iterative design.

Hale continued the discussion of managing e-resources, noting the evolution in the tools used from spreadsheets to locally- developed databases, to stand-alone disparate systems, and finally to web-scale systems. Some of the e-management challenges include retaining perpetual access rights when resources move from vendor to vendor, local workflow management and internal communication, and problem tracking. Libraries are dealing with an ever-increasing publishing output due to self-publishing, content aggregation, consortia purchasing, and shared collections.

Additionally, libraries are managing the transition to open access, addressing questions such as subsidizing author open access rights charges, negotiating and managing hybrid open access agreements, and enhancing open access metadata to facilitate discovery. Collectively, libraries are struggling with budget constraints, the increased scale of e-resources, and user expectations for “instant access.” For ongoing success there is a need to navigate the transition from an

institution-centric to a user-centric networked world with ERMs that are based on the dynamic exchange of data to connect users to content.

Pace wrapped up the panel discussion by expressing the need for a purpose-driven ERM, rather than one that is driven by technology, standards, or current workflows. He suggested that the solution is intelligent workflows, connected to a global data network and powered by the library cooperative. The basis of the workflows would be a knowledge base that allows for selection, acquisition, description, discovery, and access and that shows availability right up front. Pace noted that the WorldCat global data network, as the largest supplier of library data and with an already established ethos of cooperation, could provide the solution for cooperative data management and intelligent workflows.

### **Opportunities beyond Electronic Resource Management: An Extension of the Core Competencies for Electronic Resources Librarians to Digital Scholarship and Scholarly Communications**

*Angela Dresselhaus, University of Montana*

Reported by Katherine Eastman

Dresselhaus, a manager of seven staff members and a fledgling institutional repository, began by citing Jennifer Adams and Kevin Gunn in their definition of digital humanities as “an emerging field revolving around the intersection of traditional humanities disciplines and technology.” Dresselhaus proceeded to provide examples showing how librarian encounters with digital humanities are shifting from a supporting role to active engagement as principal investigators.

Dresselhaus emphasized the key role that data visualization and information retrieval play in digital humanities, and provided examples of visualization and non-traditional research projects which contribute to the body of scholarly communication that tenure and promotion portfolios might include. She cautioned the

audience to remember that digital humanities researchers are often fiercely independent and unlikely to approach the library for assistance, and therefore, an emphasis must be placed on offering opportunities for partnerships with librarians without the appearance of overstepping boundaries, stepping on toes, or alienating researchers from potential collaborative efforts.

After providing a brief overview of the range of scholarly communications – print materials, e-books and journals (fee-based and open access), databases, and interactive websites– Dresselhaus stated that the role of the institutional repository is shifting from widening access to elevating the profile of an institution, providing visibility for individual researchers, preserving at risk materials, and enhancing cross-disciplinary collaboration. She mentioned the use of [WordSeer](#), a service from UC Berkeley that bills itself as a text-mining and analysis environment for humanities scholars. Dresselhaus also noted that throughout the years, presentations on institutional repositories at NASIG have shifted from initial workshops on how to begin the implementation process to assessing the success of institutional repositories at meeting end-user needs.

A quick overview of NASIG's *Core Competencies for Electronic Resources Librarians* led Dresselhaus to posit potential opportunities for publishing and data curation as essential components of librarian involvement with digital humanities. "Librarians could use their skills to curate datasets, which represent a growing and quickly evolving need in our organizations. Take a role as advocates. Encourage faculty members to care what happens to their article after publication..." She exhorted librarians interested in digital humanities to shore up gaps in their existing knowledge, such as informational statistics.

Dresselhaus proposed that the success of a transition into a more active role in the digital humanities hinged on the ability to have a high level of tolerance for complexity and ambiguity, remain flexible, and retain the ability to function in a dynamic, rapidly changing

environment. She encouraged library managers to avoid the potential pitfall of discounting the potential technical contribution of older staff members as digital conversions make more of the tasks initially assigned to technical services obsolete. She also added, "Don't indulge stereotypes about your thirty-year employee not being able to do technology." She provided an example from her own staff of a long-term employee who, once assigned to the institutional repository, felt empowered to promote that service to faculty directly and became a strong advocate for self-archiving.

To quote Miriam Posner, "the success of digital humanities in libraries depends on the energy, creativity and good will of a few over-extended library professionals and the services they can cobble together." The distilled message of this presentation can be decanted as such: words like "cobble" and "over-extended" should not comprise the sum total of our contribution to digital humanities. To that end, Dresselhaus suggested that the board members present take her presentation as a motion for NASIG to define core competencies for digital humanities librarians.

### **ORCID Identifiers: Planned and Potential Uses by Associations, Publishers and Libraries**

*Barbara Chen, Modern Language Association  
Gail Clement, Texas A&M University  
Wm. Joseph Thomas, East Carolina University*

Reported by Lynn R. Shay

This session centered on how [ORCID](#) is being used by librarians, associations, and publishers to assist with scholarly communications. Thomas began the session with an explanation of ORCID -- an open, non-profit organization that provides a registry of unique sixteen digit numbers for researchers (<http://ORCID.org/content/about-ORCID>). When this persistent identifier is embedded in research workflows and becomes a core part of the metadata associated with a researcher's work, then discovery of scholarly communications improves. Use of ORCID helps scholars claim their works and eliminates the name ambiguity

problem in research and scholarly communications. For members, ORCID has an API that enables the exchange of information between systems. ORCID also provides help services and webinars, and works as a team with implementing organizations.

Chen spoke about the implementation of ORCID at the Modern Language Association (MLA). Chen wears three hats—she represents a publisher, an association, and a database producer. MLA is a scholarly communications organization that advocates for member's scholarship. Authentication and identity management is important; therefore, the organization enthusiastically endorses the use of ORCID.

ORCID more easily identifies members, enabling leaders of MLA to do a better job in advocating for members' scholarship. In addition, the MLA's role of assisting member scholars in making their works easily findable is where MLA, as a publisher, runs into problems. Chen illustrated the problem of author identification when creating the annual meeting program. MLA receives over one thousand submissions for the program and, with 2.5 million authors in their scholar database, disambiguation is a problem. Chen and her IT department tried to create an author/name variant file, but that is as far as they got.

MLA is encouraging members to get and/or add ORCID when they renew their membership online, supplying a link from the MLA website to ORCID. Then, MLA will be able to automatically populate the author database with MLA members' ORCIDs. Members with an ORCID identifier will be able to use the MLA bibliography to import their works from the bibliography to ORCID, creating a permanent record of their endeavors. MLA has taken steps to educate association members about ORCID. The association created and disseminates fliers, and conducts webinars to educate scholars.

Next Clement, a scholarly communications librarian at TAMU, spoke about a program at her university. Clement is the principle investigator for the ORCID Adoption and Integration Program at TAMU. They have a long legacy of research and service, so they wanted to

implement ORCID for the entire campus. Clement is working with over 10,000 graduate students, post-doc students, medical residents, and interns. The goals of this effort are to: establish scholarly identity at the start of the scholar's or professional's career; position new researchers for success by creating the identification needed for research support systems (grant applications and manuscript submission to publishers); and develop an infrastructure for tracking student success. The libraries work to help students establish and curate their scholarly identity. ORCID is a linchpin in this. Use of ORCID will also assist in assessment because it allows the tracking of scholars and the outcomes of their scholarly efforts.

TAMU has a membership/subscription to ORCID, which has additional benefits. Because of these benefits, Clement was able to use the ORCID API to create ORCID records and to manage records on behalf of the students and employees. There were some university administration hurdles, but 10,334 ORCIDs were minted for graduate students. ORCIDs were sent via email, and, so far, 2,138 ids have been claimed.

Clement noted that automation of ORCID is not enough; outreach and training are also important. ORCID is integrated into the library public services' website where there is an ORCID LibGuide and an ORCID cookbook. She will continue her efforts to better implement ORCID.

Wm. Joseph Thomas serves as assistant director for research and scholarly communication at East Carolina University (ECU). He wrapped up the session by describing the efforts to implement ORCID at ECU. While recognizing that large scale efforts of implementing ORCID are worth the effort, instead ECU concentrated on outreach to individual faculty. Thomas explained he contacts individuals, is available at departmental meetings, and makes ORCID part of other scheduled presentations. For example, when working with a faculty member he will let them know they can access *Nature* articles with their ORCID.

A key related project at ECU is REACH NC, which is a portal that connects users to thousands of experts and assets within North Carolina higher education and research institutions. Scholar profiles within Reach NC are created using SciVal Experts which in turn is populated by Scopus. Thomas showed an example for a faculty member who has published using two names. Because of this the profile misses many publications. With an ORCID, the author would be able to associate all his/her publications with that profile.

For Thomas, success at ECU comes from understanding that administrative support is key. He also advised that you need to connect ORCID to something the faculty member cares about; for example, measuring their research impact. He concluded by sharing the realization that by spending more time on your implementation will be slow down the uptake of the service.

### **Personalizing the Library Service to Improve Scholarly Communication**

*Elyse Profera, Taylor & Francis Group  
Renee N. Jefferson, The Citadel*

Reported by Gaelle Gillespie

Profera began by stating that while she works for the publisher, Taylor & Francis Group, she does not work in sales. Instead, she works in the Library Communications-Academic area, which provides services to academic libraries to help them meet their users' needs and find the best ways to facilitate access to and promote research sources across their campuses. Jefferson introduced herself as a librarian at The Citadel with a background in educational research and statistics. She is interested in bridging the gap between users' preference for convenience and speed when doing research, and finding ways to provide them with quality research results without losing the personal touch. The Citadel, a military college, has a student body made up of resident cadets and non-resident, non-cadet students. Except for a few week-end passes

during the year, the cadets are restricted to campus, much like a military base.

Since The Citadel's library resources have evolved from print to mostly online, there has been a shift in user behavior effected by the physical and virtual spaces on campus. Although researchers do not need to step foot into the library to do their research, Jefferson wondered if they are actually finding the best resources to suit their needs. She also wanted to find out what would make the physical space in the library more appealing and the virtual space more effective. She decided to see how those factors could be discovered and assessed.

The library began with a global survey of all their users to obtain information about physical space and user behavior. They received 397 responses to the survey and followed up with focus groups that included librarians, faculty, graduate and undergraduate students. The outcomes are as follows: 96% wanted individual study spaces; 95% wanted collaborative spaces; 93% wanted computer labs; 90% agreed that space considerations and position of that space is important; 89% agreed strongly that as print declines, the resulting space should be reconfigured for users. As for social media use, eighty-five faculty and 167 students responded that they regularly use social media sites, with Twitter being the most popular.

The library's research also provided information about their virtual space and user behavior. Students use computers in the library more than elsewhere on campus due to printing capabilities. Students pay the most attention to something they need for class, and anything offered beyond that is not considered. Students do not understand how to effectively search for content in the virtual library, and cannot comprehend the quantity of electronic content that exists. Survey results found that professors prefer that information about library resources be given in class because students, especially the resident cadets, must attend class, and they look to their professors for information. Also, the classroom is the place where cadets talk to people the most, and it's the ideal place



to discuss both subject-specific and general resources that best support their subject areas.

As a result of these findings the library defined a case study wherein subject librarians would consider the following approaches: create subject-specific newsletters; conduct one-on-one meetings with faculty; conduct instructional sessions; and do course-specific classes. As a result, 90% of subject librarians scheduled a meeting with faculty, and library resource usage increased 45% after implementing such meetings. The most important goals of the meeting plan implementation were: to educate users on the breadth of resources available and how to use them; to increase usage of library electronic resources across all end users; and to raise awareness of paid-for electronic resources. According to their findings, the most popular methods to meet these goals are library-hosted webinar tutorials (55%), electronic ads placed on the library website (53%), a newsfeed on the library's website (52%), e-mail campaigns (43%), and e-newsletters (43%).

From the publisher perspective, Profera reported that 73% of publishers use web-based training for their content platforms. Publishers also can provide other approaches to help libraries raise awareness about their content to end users by providing publisher-library workshops (77% of publishers offer this), quarterly newsletters by subject (73%), offers of free-access months for products (65%), offers for print and electronic promotional items for library distribution (61%), and e-mail campaigns to end users (45%). Taylor & Francis uses several promotional efforts for individual journals or subject-group journals, promoting these via e-mail, e-promotionals, and social media. Since article collections often drive usage, publishers offer an e-journal or a bundle of e-journals free for three months. This approach, however, gets mixed reviews from librarians and end-users, because it causes frustration when the promotion is over and the e-journals are no longer accessible.

Some of the most important findings from the library's self-study and Taylor & Francis' promotional assistance

were that physical library space and virtual library space are important and need to be made as inviting and useable as possible. Both Jefferson and Profera advised that you need to know who your consumers are, and then educate and engage with them on their terms in order to best meet their needs. They also recommended that you measure results to find places for improvement, leverage relationships with friendly publishers to reach desired marketing goals, and promote library resources by using mobile technology.

### **Planning for the Budget-ocalypse: The Evolution of a Serials/ER Cancellation Methodology**

*Todd Enoch, University of North Texas  
Karen Harker, University of North Texas*

Reported by Michael Fernandez

Faced with a flat budget in 2011, the University of North Texas (UNT) Libraries began their first round of cuts to resources. The UNT Libraries were able to reach their goal of cutting expenditures by \$750,000 through a combination of methods. These included a deactivation of approval plans, a 71% reduction of monograph allocations, and a conversion project to drop print subscriptions in favor of electronic. While the cuts were easy to implement, they were mostly one-time actions that could not be subsequently repeated.

A second round of cuts was made in 2012 with a target of \$1 million. During this stage more complex identification criteria was utilized such as looking at titles that were duplicated in other resources, including aggregator databases, analyzing usage statistics and cost-per-use, and considering cancellation of titles with embargoes of a year or less. In collaboration with subject liaison librarians, input was gathered from faculty who helped to review proposed cancellation lists and rank titles in order of importance. The UNT Libraries were able to make its targeted cuts in spite of the target being raised to \$1.25 million.

In 2013 there was a reprieve from cuts and the Libraries received a one-time lump sum of money to cover

inflation. This allowed more planning for a third round of cuts in 2014. With another \$1.25 million targeted, the Libraries looked to focus on subscriptions greater than \$1,000. Additionally, data would be collected and analyzed to break down costly big deal packages.

For the data analysis, the UNT Libraries looked at common measures such as usage, costs, and calculated cost per use. The Libraries also considered other criteria such as title overlap, inflation factor, as well as input from librarians regarding perceived value and relevance. These varied measures were applied to different types of resources, such as single e-journal titles, databases (full text, and abstracting and indexing), Big Deal packages, and reference sources. Given the variety of resource types, some metrics were applied universally while others pertained only to specific resources. For example, usage could be defined as full-text downloads for e-journals and some databases, whereas with abstracting and indexing databases and some reference sources, record views would be a more accurate gauge of use.

In order to assess the value of Big Deal packages, the Libraries looked at the distribution of usage. A determination was made on what percentage of titles accounted for 80% of usage for all packages analyzed. A wider spread of title usage meant a higher value for the package; while a greater concentration of usage among fewer titles meant a lower value. Big Deal cancellations were considered with comparable alternative models evaluated based on the list price of individual subscriptions to high use titles.

A scalable scoring metric for every type of resource was ultimately determined based upon the following: cost per use, the weighted sum of liaison ratings, and inflation factor. Using this composite score, appropriate actions were determined for every resource being considered for cancellation. The current round of cuts is still in progress and awaiting faculty feedback.

## The Power of Sharing Linked Data: Giving the Web What It Wants

*Presented by Richard Wallis, OCLC*

Reported by R. Lundberg

Library materials are not highly exposed on the web where information seekers go first, partly because machines have trouble reading data in MARC records. Linked data is one solution to increase the exposure and discoverability of library materials in the evolving web of data. Wallis encouraged libraries to register with aggregators such as OCLC to harness their size, and linked data technologies and capabilities to expose libraries collections on the web of data.

Wallis explained how libraries can join the web of data to expose their collections by giving the web what it wants: size (aggregation), familiar structures (e.g., linked data, *Schema.org*), networks of links with no restraints (referrals), and stable entity identifiers (e.g., URIs, VIAF). Libraries are already satisfying many of these wants, but more needs to be done.

Wallis requested that libraries register into a network so data can be aggregated to achieve size and exposure. This is a key starter. For some libraries, registration will be business as usual: add holdings, bibliographic records, and name authority records. After registering with OCLC, Richard said they will do the rest. (Linked data in WorldCat can be viewed by opening "Linked Data" at the bottom of the record.)

The Bibliothèque Nationale de France (BnF) is already reaping the rewards of its investment into linked open data. Over 80% of their visitations to the detailed record view come via search engines. Linked data will also create opportunities for new services and products. Library data stored as entities (works, places, concepts, people, organizations and events) can be connected (graphed) in new ways. Wallis gave the example of library "knowledge cards" that can be created on the fly to support user tasks. This raised the question of where BIBFRAME fits into the bigger picture, given that

Schema.org was created by Google, Yahoo!, Bing, and Yandex. Wallis admitted that Google will not adopt BIBFRAME, but they will complement each other. Wallis is chair of the Schema Bib Extend Community Group which aims to "to discuss and prepare proposal(s) for extending Schema.org schemas for the improved representation of bibliographic information markup and sharing."

Wallis' slides are on SlideShare, and the core of this presentation can also be seen in OCLC's webcast, *Data Strategy and Linked Data*, presented by Ted Fons, Executive Director of Data Services, on (<http://www.oclc.org/data.en.html>).

**The Quick and the Dirty:  
The Good, the Bad, and the Ugly of Database  
Overlap at the Journal Title Level**

*Karen Harker, University of North Texas  
Priya Kizhakkethil, University of North Texas*

Reported by David Macaulay

Karen Harker and Priya Kizhakkethil maintained an appropriately western theme in their presentation on methods for investigating journal-level overlap in abstracting and indexing (A&I) and full-text databases, outlining "the good, the bad, and the ugly" aspects of various tools and methodologies that have been employed for this purpose at University of North Texas (UNT).

The presenters started by noting that duplication in the coverage of different databases is natural, since the subject areas on which resources focus themselves overlap. The increasing prevalence of web-scale discovery and federated searching means that duplication of coverage amongst databases is no longer a "necessary evil" to ensure discoverability of relevant content. As budgets tighten up, librarians are more apt to consider dropping database subscriptions to save money and want to know what unique coverage would be missed or retained if something is canceled. The

presenters described two attempts at systematic database overlap analysis at UNT.

The first exercise focused only on abstracting and indexing (A&I) databases, and the overlap analysis was performed in the following manner: Title lists were obtained from resource vendors and loaded into a local database; pairs of lists were compared (by matching on ISSNs) to determine which titles covered by one database were also covered in another. When the overlap was 75% or more, a list of the unique titles covered by the database being considered for cancellation was presented to a subject librarian, who determined whether losing this coverage would be acceptable.

This exercise was considered successful because suspicions were confirmed regarding the dispensability of certain databases with high overlap and low usage, and these subscriptions were consequently dropped. Up-to-date title and coverage information was readily obtainable from the relevant vendors. The analysis, however, turned out to be a very time-consuming effort. The process was limited to comparing pairs of databases. In some cases, the title lists supplied by vendors were in PDF format, which was difficult to manipulate and enter into the database. In addition, some title lists also had missing ISSNs.

The second attempt involved a comprehensive assessment effort covering A&I databases, full-text aggregator databases, and journal packages by using three different automated analysis tools: the JISC Academic Database Assessment Tool (ADAT); the Resource Comparison component of the CUFTS open source serials management system; and the Serials Solutions Overlap Analysis tool. Each of these tools was used to collect two pieces of data for a range of resources, both full-text and A&I: the number of overlap titles and the number of unique titles. The resulting numbers were copied into an Excel spreadsheet to calculate percentages based on the total number of titles covered by each database. The presenters illustrated the process with screenshots of the various tools. This data gathering process was characterized as

being "quick and dirty". The process was "quick" because the tools involved were easy to use and the information was relatively up-to-date. In the case of ADAT and Serials Solutions, results were presented in easily readable summary tables. On the other hand, the process was "dirty" because CUFTS suffered in comparison to the other two tools in that it was slow to return results, it did not provide clear summaries, and the data required tweaking. Also, there were discrepancies in the numbers used by the different tools for a given database, and in some cases, the data was also observed to change over time. While the automated approach to the overlap analysis was quicker than the manual one, the question remained as to whether the use of automated tools was an improvement on the manual method of overlap analysis.

The presenters offered an assessment of the pros and cons of each tool, classified as "the good, the bad, and the ugly." JISC ADAT provided results clearly in the form of a simple table, but there were a few limitations such as few databases were available for analysis, only pairs of databases could be compared, and there was no graphical presentation of results. The worst feature, the "ugly", of ADAT was the inability to download or export results for manipulation in another tool. The CUFTS Resource Comparison tool offered a more extensive list of databases for analysis than ADAT, allowed for comparison of up to four databases (either A&I or full-text), and permitted downloading of results. However, some relevant databases were not available, and updating of coverage information was not consistent. The Serials Solutions Overlap Analysis tool was found to be easy to use, could compare any number of databases, and offered clear summaries as well as the ability to download the results. Unfortunately, only full-text resources were available for comparison. This tool was judged to be the best of the three tools used for overlap analysis. The automated approach to overlap analysis was determined to be "good" in requiring much less time than the manual method, "bad" in that not all databases could be analyzed, and "ugly" in that the data involved was sometimes unreliable or inconsistent.

Ultimately, all four of these "wheels" were necessary to drive the "wagon" of overlap analysis.

### **Rounding Up Those Prices: Do You Know What You Are Paying For?**

*Tina Feick, Harrassowitz  
Anne McKee, Greater Western Library Alliance (GWLA)*

Reported by Stephanie Viola

Tina Feick, of Harrassowitz, was decked out in a conference-site-appropriate cowboy hat which set the tone for the presentation. Joined by Anne McKee, they clarified the presentation title's meaning -- they were not suggesting one should overestimate journal prices, but used the song "Rawhide" to liken price gathering to rounding up cattle.

Feick presented a slide laying out the timeline of the journal pricing season. It was interesting to note that subscription agents tend to send out renewal notices to libraries and consortia during June or July, but the majority of vendors' prices are not communicated to agents until September or October. This means that many title renewal decisions are made before pricing is known.

As a way to streamline the process, audience members were encouraged to enter the renewal phase with the following details in hand: licensing requirements, FTE numbers (for the entire campus, as well as by discipline), IP ranges, and appropriate electronic resources contact information. Also, renewing institutions should be prepared to share any consortial arrangements on subscribed titles with subscription agents. Subscription agents offer many tools to aid in the renewal decision process such as price comparison reports, price increase notifications, pricing option changes, pricing studies, electronic data interchange (EDI), and standards development.

McKee encouraged the vendors in the audience to submit offers to the Greater Western Library Alliance (GWLA) and other consortia during March or August for

best results. Also, no matter when the offer is submitted, member libraries need at least 90 days to review and respond. Additionally, McKee advocated for the participation in Shared E-Resource Understanding (SERU) or the basing of licenses on GWLA's model license located here:

<https://docs.google.com/a/gwla.org/viewer?a=v&pid=slides&srcid=Z3dsYS5vcmd8Z3JlYXRlc113ZXN0ZXJuLWxpYnJhcmtYWxsaWFuY2V8Z3g6NTlwNTdiZTI0YmEzODA4MA>

The audience posed many questions to the speakers, specifically in relation to how GWLA handles renewals, and librarians were encouraged to ask their subscription agents about any concerns over transparency of service fees to libraries.

### **Taming the Information Frontier**

*Jane Skoric, Santa Clara University Library  
Carol Seiler, EBSCO*

Reported by Maryśka Connolly-Brown

The turnout for this final session of a long conference weekend was surprisingly robust. Skoric and Seiler's topic resonated with many of the attendees as lean budgets force many libraries to take long, hard looks at their resources and determine what is actually needed and what may be eliminated.

What is often missing in the vast frontier of content management are step-by-step accounts of what has to be done to tackle momentous undertakings, such as the comprehensive examination of journal subscriptions that comprised the heart of the Santa Clara University Library's journal subscription review project. This project was a massive one, involving EBSCO, the cataloging and metadata librarian, subject librarians, technical services staff, and many others. There is little doubt that taking the time to create and implement a flexible, well-thought out plan allowed them to not only save money by eliminating the "low-hanging fruit" such as duplicate serial coverage and overlaps between subscribed titles, open access, and print and online; but also to tackle more complicated issues, including

whether to maintain a subscription or rely on interlibrary loan and whether to keep content specific to the curriculum or specific to instructors.

In some cases, the librarians were surprised to discover that many – and sometimes expensive – titles were retained year after year, not because they were being used significantly or supported the curriculum or accreditation, but out of habit. In the end, this housekeeping effort led to leaner, more conscientious journal content and subscription practices that serve as an example to other libraries, lean budget or not.

### **Techniques for Tracking Perpetual Access**

*Chris Bulock, Southern Illinois University—Edwardsville*

Reported by Karen Tyrell

Bulock examined the systems used to track journal perpetual access and gave features and examples of these systems. He noted that libraries should track perpetual access because they need this information to make decisions regarding renewals, and cannot rely on publishers to notify them. He also gave several scenarios that could give rise to the need for perpetual access, such as the cancellation of a journal subscription, cessation of publication or the publisher goes out of business, a journal that is sold or transferred to another publisher, and/or if a journal changes hosting platforms. He added that libraries need to know the terms of licenses, including perpetual access provisions, the penalties for post-cancellation, and allowances for archiving and self-hosting. He also noted that libraries should know whether perpetual access applies to all issues accessible during the agreement, to issues published during the agreement, or if it's a bundle package, to all journals in the package. Some other questions include: "Does it apply to all journals or subset? What happens if it's a print item when there is a new edition?"

From the results of a survey conducted in March 2014, Bulock described several systems used by libraries to track journal perpetual access. These systems include

using the electronic resource management (ERM) system to track license information (current status of the resource, specific packages, and title level relevancy and year-to-year title list variation, etc.). This method had a 33% response rate of usage in libraries. The integrated library system (ILS) was also identified and utilized by 25% of the survey respondents. The ILS is more specific and gives detail from the journal's bibliographical record that can be suppressed when the subscription is canceled. 24% of respondents indicated the use of spreadsheets for tracking license information. One of the key attributes of spreadsheets was its ability to provide a listing of providers and individual purchases. Using the Open URL link resolver knowledge base (KB) was a reported method by 32% of respondents; the presenter argued that this can be used solely for access and also for tracking journals. Other methods were employed by 4% of the respondents. Next generation management systems were not used at all for this purpose.

Three potential obstacles in tracking perpetual access were highlighted by the presenter. He noted that publishers sometimes do not comply with Presentation and Identification of E-Journal (PIE-J) guidelines (PIE-J was approved in March 2013 by National Information Standards Organization). He highlighted another obstacle, which is the reluctance by a new publisher to honor perpetual access when a transfer had occurred. He concluded by imploring librarians to be vigilant in managing and providing perpetual access to their users.

### **To Boldly Go Where Few Have Gone Before: Global Research Management in the Cloud**

*Rene J. Erlandson, University of Nebraska at Omaha*  
*Jeff Kuskie University of Nebraska at Omaha*

Reported by: Jana Brubaker

Erlandson and Kuskie discussed their experience implementing and using OCLC's WorldShare Management Systems (WMS) at the Criss Library at the University of Nebraska, Omaha. WMS is an integrated suite of cloud-based library management applications.

The library holds over 1 million e-resource titles and manages one hundred license agreements. Prior to the implementation of WMS in 2013, they used three different vendors for their ILS, discovery platform, ERMS, link resolver, A-Z list, and remote access authentication, and they had to create, maintain, and manage e-resource records locally.

WMS has a unified framework, and replaced the various separate components that the library was previously using. This means they now have access to global information that can be shared, including vendor information, resource metadata, and coverage updates. They added their e-serial collections to the WorldCat knowledge base through the PubGet program, which harvests institutional holdings information from providers' sites. OCLC also has a partnership with EBL that provides holdings updates every two weeks. Previously, library staff had only been able to update holdings twice a year. Erlandson said that they have been particularly pleased with the global license manager, which allows them to derive licenses from global templates and provide access to license information to staff.

The advantages to using WMS include that since it's a unified service platform, library staff does not need to maintain coverage or manually load MARC records, and there is a large community participating in data quality assurance and maintenance. Improvements that they would like to see in the future include the ability to move from one function to another more easily, more relationships with vendors like EBL and PubGet, and the addition of a usage statistics dashboard with the ability to link usage data to cost data elements. The OCLC representative in attendance said all of those improvements are coming. Erlandson and Kuskie emphasized that WMS is being enhanced on an ongoing basis.

If a library is contemplating moving to WMS, Erlandson and Kuskie recommended that they determine which data should be shared globally and which data should be private. They should also decide which staff members should have access to what data and work on

user credentials to supply to PubGet. Finally, they suggested that potential WMS users begin to educate library staff and faculty. For example, there may be some lag time between automated updates and actual access to the resource. It is better if staff and patrons are aware of the access delays from the onset if considering WMS implementation.

## **The Unbearable Insecurity of the Electronic Resources Librarian**

*Stephen Buck, Dublin City University*

Reported by Michael Fernandez

With the *NASIG Core Competencies for Electronic Resources Librarians* as a basis, Buck used his presentation to contrast theoretically desired skill sets with the daily realities of electronic resources librarianship. Drawing from his professional experiences as an electronic resources and periodicals librarian, Buck sought to demystify many of the processes that comprise e-resources management.

Using a good amount of humor and self-effacement, Buck outlined some of the anxieties he confronted as a librarian new to e-resources management. Buck admitted to not being formally trained in some areas and detailed how much of his knowledge and skills have been gained on the job. For some competencies such as licensing and knowledge of information standards and protocols, Buck was able to develop an understanding through continuing education and conference attendance.

At this point in the presentation, Buck, with some assistance, performed a skit of a dialogue between a vendor and a novice e-resources librarian. The dialogue progressed from some basic questions about the librarian's institution, to a complex inquiry about metadata mapping and culminated with an escalating price quote. While exaggerated for comic effect, the skit served to illustrate genuine concerns that can confront a fledgling e-resources librarian. When starting a new job, an e-resources librarian may have to quickly

become adept with their institution's ILS or ERM as well as be able to recall FTE and other information offhand. Additionally, they may lack knowledge of metadata standards or the ability to negotiate with vendors.

Buck continued to outline more aspects of librarianship he had to learn on the job. For example, Buck described the need to determine the start of the institution's fiscal year and the process for prepaying subscriptions and then reconciling balances at the end of the year. Other competency areas can be anxiety-inducing, such as effective communication, supervising, and management. Again, Buck used on the job experiences to illustrate these. In one example, he had to explain to a government official why a vendor was not awarded a contract. Another example entailed a misunderstanding between Buck and the team of assistants he supervised. This demonstrated the importance of making sure all affected parties are included in email communications. Much of an e-resources librarian's work depends on the communication chain--whether it's between faculty and librarian or librarian and vendor. Here, Buck emphasized the *Core Competencies'* call for "a high level of tolerance for complexity and ambiguity" as an important personal quality for a librarian to have.

Buck concluded his presentation by listing the duties that comprised his job description when he started and contrasting them with his actual daily work. While the initial job description detailed a large number of varied tasks, much of Buck's actual work is more focused and consists of responding to e-mail, troubleshooting access issues, and gathering usage statistics. Concluding, Buck assured e-resources librarians that they could make a difference at their institutions by streamlining workflows through their strategies and ideas.

## Why Can't Students Get the Sources They Need? Results from a Real Electronic Resource Availability Study

*Sanjeet Mann, University of Redlands*

Reported by Sharon K. Scott

Mann spoke a bit about his early background in computer science and his work in IT on college campuses. In meeting and speaking with librarians on campus, he became interested in the field, and during this time decided to get his library degree. Combining his two interests, he became interested in availability studies. At his own institution, he confidently predicted that users have only a 41% success rate in finding the electronic resources they need.

Availability studies for systems have existed for a long time. When this form of study is performed by trained library staff it is known as a "simulated availability" study. Another form of study is the qualitative approach, which is more of a usability study than an availability study. In this research method the user is observed by library staff as he/she attempts to locate the needed item. This research focuses less on the technical side and more on user behavior.

Mann has done three availability studies - two simulated availability studies, and one study in which students participated. The methodology Mann employed with students was a combination of the two research types. Quantitative methods were used to determine the overall availability of resources. The usability research method, which is more user-focused, was employed to compare the way the student subjects attempted to retrieve full text as opposed to an "ideal" process developed by the University of Redlands librarians.

There are significant differences in the way library staff, who are more familiar with the databases and interfaces, perform a search, and the method by which a typical student may attempt to find the same item. For example, Mann demonstrated this difference by

having the test group each search for the full text of a book chapter about the popular character, Buffy the Vampire Slayer. The student in his test group failed to find what he needed and moved onto the next item. The chapter was available, though finding it required a high level of understanding of how information in the library's resources is structured.

The test sample of seven students was given two searches with ten results each, culminating in 142 interactions. During this study, *Jing* (screen capture software) was used to capture interactions. The students were given a general set of guidelines for how to proceed, but were not monitored to see if they followed these steps completely; this provided a more realistic view of how students actually search.

General results of the study showed that 25% of the users did not get the item, 43% went through interlibrary loan (ILL) to obtain the item, 3% did locate a physical item, and 29% were able to download the correct item. The error rate was about the same for system-error and user-error: 31% for system-error and 35% for user-error (there was also a 16% crossover with both system- and user- error). Severe examples of system errors were the following:

- A database was missing the OpenURL link, refused the OpenURL, or had bad/missing metadata.
- The knowledge base linked to only the title of the article, not the full text.

There were also a few user errors such as the link was not tested, the local system was not used correctly, important information was overlooked, and/or the student gave up searching out of frustration.

Availability studies can be used to examine various questions: How often do errors occur? Should changes be made in the technical infrastructure? How often do users need ILL? Is there enough full-text in the collection? Are users being taught what they need to be successful finding electronic resources?



## Yer Doin' it Wrong: How NOT to Interact with Vendors, Publishers, or Librarians

*Anne McKee, Greater Western Library Alliance  
Katy Ginanni, Western Carolina University  
Jenni Wilson, SAGE Publications*

Reported by Katherine Eastman

Beginning the session by sitting in three mismatched arm chairs taken from the hotel lobby, McKee, Ginanni, and Wilson, set the tone for an informal, back-and-forth discussion of negotiation etiquette. Each speaker introduced themselves, and then McKee explained the discussion-style format. She requested that participants remain respectful and anonymize their examples by “filing off the serial numbers and identifying features.”

McKee began by reading the list of potential questions. The first group of questions focused on interactions from the librarian perspective. The following were some of the featured questions: Is it fair for librarians to give business to whoever wines and dines them the best? Can one discontinue business with a vendor due to hating the sales representative? Is it okay to not to inform vendors after selecting another product? The second group of questions focused on the purchasing interaction from the vendor point of view and included questions such as: Is it fair for a vendor to go over the head of a librarian and approach a dean, provost, or even a well-known alumna to get them to reverse a collections decision? Can the vendor quietly allow non-members into a consortium deal without first asking the consortium's permission? Is it reasonable for the vendor to employ guilt tactics in order to coerce the purchasing librarian into selecting their product (my child/mother/panda is sick and I'll lose my job if I don't meet my quota)?

The panelists began alternating between both groups of questions and provided anonymous examples of poor behavior and presented their opinion on the correct ways to handle these situations. The panelists

concluded on many of their suggestions. They suggested we abide by the golden rule and be courteous and fair. However, some questions elicited a more raucous debate. For example, the panel addressed the following question: Is it fair for librarians to issue an RFP that is so narrow in focus that all vendors know it was written with a specific vendor in mind? While McKee considered this unfair, since new products and services that might serve users better would be missed by such an RFP, Ginanni proposed that often an RFP is red tape, and a library may not want to change their vendor. Several members of the audience stepped forward to affirm that they had to demonstrate due diligence in researching the most efficacious platform/product/service for their library, which included issuing an RFP. McKee suggested that those creating an RFP might consider an RFI because it does not have a mandatory award expectation.

One question was related to a previous presentation regarding license negotiation: Is it fair for publishers to retroactively change or add to an existing contract? McKee asked Jane Smith and Eric Hartnett from Texas A&M University to discuss their experience with a vendor retroactively changing the agreement terms. Several attendees offered their experiences with similar situations. Notable insight came from the question: Is it fair to refuse to do business with a vendor because they're making a profit? McKee presented the idea of a “fair profit”, i.e., that librarians need publisher content in order to provide the best services for their users. Vendors are in business to make a profit, but there are acceptable and unacceptable levels of profit, and librarians are encouraged to negotiate prices to reflect fair market value.

## Profile of Steve Kelly: President of NASIG

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Wm. Joseph Thomas

Steve Kelley is the head of continuing resources and database management at Wake Forest University, where he has worked since 2002. His department is charged with serials receipt and cataloging, physical processing, authority control, and catalog database maintenance. Steve is also the liaison to the Russian and East European Studies Department.

When asked what he did before he became a librarian, and what led him to library school, Steve started his answer with his undergraduate degree. He earned his B.A. in history, with a Russian minor, from Washington University in St. Louis in 1991. After Steve graduated, he worked as a temp for a while, and then found a “permanent” job at a sporting goods wholesaler. Steve said that he really didn’t enjoy working at the wholesaler. His older brother had been working as a copy cataloger at Washington University in St. Louis for a few years at that time, and seemed to really like working in a library, so Steve got a job at the same library in the Serials Department.

In 1993, Steve moved to Chapel Hill, NC, to attend graduate school for history. That wasn’t a good fit, so he left the program. Having really enjoyed library work, he pursued a paraprofessional job at UNC-Chapel Hill in January 1994. Steve divided his time, working in the Backlog Unit of the Copy Cataloging Section in the morning, and in the Collection Development Department in the afternoon. It gave him an interesting view of multiple areas in libraries, and it inspired him to start library school that fall. He went to graduate school part time and continued to work full time, so he didn’t graduate until December 1999 (But at least he didn’t have any graduate school debt!).

Steve’s first professional position was as cataloging librarian at Ball State University from 1999 to 2002. In 2002, he began working at the Z. Smith Reynolds Library at Wake Forest University. Prior to his current position,



Steve worked at Wake Forest as a serials cataloging librarian and then head of resource maintenance. His job has gradually grown through the years; now he supervises periodicals check-in, binding and marking, and catalog maintenance (including withdrawals, batch loading, record corrections, and authority control).

Steve noted that he likes “solving problems...figuring out processes.” A co-worker of his has called him a “junior Henry Ford” because he really likes figuring out a process for new areas of work. Conversely, the parts of his work he likes least are probably those things that are repetitive. He deals with them by listening to music while he works. He understands that other folks might find it distracting, but he feels that it helps him focus.

Steve has been a member of NASIG since 2000. He first explored the organization because the dean of technical services at Ball State (and former serials cataloger) suggested that he go to the NASIG annual conference, especially to attend a serials cataloging pre-conference. Of course, the fact that the conference was held in San Diego, California that year might have helped draw him.

Steve is an active member of the organization. Before being elected vice president/president-elect in 2013, he

was vice chair and chair of the Membership Development Committee. In 2009, Steve was elected a member-at-large of the Executive Board for a term. He worked with the 2007 and 2009 conferences as well. Steve served as the audio-visual coordinator for the Conference Planning Committee for the 2007 conference in Louisville, Kentucky. He was then lucky enough, as he describes it, to be tapped to be the co-chair (with Eleanor Cook) of the Conference Planning Committee for the 2009 conference in Asheville, North Carolina. Steve says his favorite NASIG conference was probably this conference, in Asheville. It was a huge amount of work, he says, but it was also a lot of fun. He continued, "Doing something like that is sort of a trial by fire, and you can really bond with the people you share the experience with."

Steve is also active in ALCTS and the North Carolina Library Association (NCLA). For ALCTS, he has served on the Continuing Education Committee of the Cataloging and Metadata Management Section, on the Continuing Resources Cataloging Committee of the Continuing Resources Section, and as a jury member for the Ulrich's Serials Librarianship Award, Edward Swanson Memorial Best of LRTS Award, and the Esther J. Piercy Awards (whew!). Steve is still a member of the Continuing Resources Committee and in the third year of his membership of Cataloging Committee: Description and Access (CC:DA). As a member of the NCLA, Steve has been active in conference planning activities, managing exhibits for three NCLA conferences, and overseeing the conference store.

How has NASIG supported Steve in his varying professional positions? Although his job has grown over the years and includes a variety of responsibilities, Steve describes himself as a serials cataloger at heart, saying that NASIG has been enormously helpful in keeping him up to date on changes in serials cataloging, as well as keeping him informed about the serials world in general. The service opportunities that NASIG provides have also been a huge help, and the professional contacts he has made have been very valuable to Steve.

When asked about his hobbies and special interests, Steve admits to being a "general purpose music nerd," a big music fan who mostly listens to various forms of rock. He was a punk rock/new wave kid as a teenager (Do any pictures survive, Steve?). He goes to a lot of concerts and has been to the South by Southwest music festival several times. Steve also loves baseball, especially the St. Louis Cardinals. He described himself as "rather obnoxious when NASIG was in St. Louis in 2011," and says he wore a different Cardinals shirt every day of the conference. He is also a comic book reader and collector. He hasn't counted them in a long while, but says he probably has between thirty-five and forty thousand comics.

When asked what changes he sees for serialists over the next five years, Steve replied, "That's a tough one." He thinks that we'll see more resources that aren't traditionally defined as serials becoming more serial-like. "That is," he continues, "we'll see more resources that are available through subscription payments rather than outright purchase (like a lot of e-book packages), and more electronic resources that grow over time rather than remain as static, clearly-defined things." Steve further believes that serialists will be brought in more and more to help figure out how to manage these increasingly serial-like resources because serialists understand how to manage things that are paid for by subscription and how to describe things that change and add content over time.

NASIG can help serialists be prepared for changes like these by continuing to provide great educational opportunities, especially through our conferences and webinars. Both help serialists stay aware of changes in the field. NASIG also provides a forum for discussion that he thinks is very important. Steve feels that the manageable size of NASIG helps this discussion flourish, because some organizations are so large that one can feel rather lost. And, as he noted earlier, Steve believes that serials and subscription-based resources are only going to become more important in the library and publishing worlds, and NASIG is a great place to learn how to deal with them. Steve remembers a joking suggestion by Bob Boissy that NASIG adopt the tag-line,

“NASIG: Because We’re 80 Percent of Your Materials Budget.” Steve observed that there’s a lot of truth to that rather tongue-in-cheek statement. He concluded with a short commendation for serialists and NASIG,

noting that what we work on is important for our libraries and our institutions, and NASIG provides a community of support and continuing education for serialists.

## Columns

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### Checking In

Kurt Blythe, Column 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 at [kcblythe@email.unc.edu](mailto: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.]

NASIG! Please join me in welcoming the following new members:

As metadata/electronic resources librarian at Marymount University, **Viral Amin** has been managing online continuing resources for the past two years. He has a background in developing digital collections and cataloging foreign language materials. He attended his first NASIG conference over a year ago in Buffalo where he learned that NASIG is not just about serials check-in and cataloging. He looks forward to upcoming NASIG conferences and activities, especially the 30th Annual NASIG Conference--which takes place close to home--to learn about trends and developments not just in serials management, but scholarly communication and publishing, as well.

Viral Amin  
Assistant Professor  
Metadata/Electronic Resources Librarian  
Library & Learning Services  
Marymount University  
703-284-1534  
[vamin@marymount.edu](mailto:vamin@marymount.edu)

**Susan Vaughan** has been at the University of Dallas for twelve years and was appointed serials librarian in 2007. She joined NASIG to participate in learning more

about how other academic libraries are keeping up with all the changes in acquiring, managing, and providing access to journals as publishing continues to change and evolve into new models.

Susan Vaughan, Serials Librarian  
University of Dallas, Blakley Library  
1845 E. Northgate Dr.  
Irving, TX 75062

Finally, **Andrew Wesolek** began his career in 2011 as scholarly communication librarian at Utah State University. In summer 2013, he took the newly-formed position of head of digital scholarship at Clemson University. In this capacity, he is responsible for initiating and developing Clemson Libraries' digital scholarship activities. These include launching and managing an institutional repository, educating faculty and promoting alternative publication models, serving as a resource for copyright education and compliance, and managing the activities of the Libraries' Digitization Lab. In addition, he is proud to serve as the layout editor for the *NASIG Newsletter*. Scholars communicate with one another largely through serials, so joining NASIG was a natural fit for Andrew. He also presented at the NASIG conference in Nashville and was blown away by the collegiality of the members of NASIG. He is very much looking forward to the opportunity to attend again in the not-too-distance future.

Andrew Wesolek  
Head of Digital Scholarship  
Clemson University Libraries  
Clemson, South Carolina 29634  
864-656-0317

## 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](mailto: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.]

As per usual, NASIG members are active in advancing the scholarship of the profession:

**Bob Boissy** has the following citation:

Boissy, Robert W. "Forces Shaping Scholarly Publishing." In *Rethinking Collection Development and Management*, edited by Becky Albitz, Christine Avery, and Diane Zabel, 3-11. Santa Barbara: Libraries Unlimited, 2014.

**Kelli Getz** published the following:

Getz, Kelli, Miranda H. Bennett, and Nancy Linden. "Encouraging Entrepreneurism with Internal Small Grants: The Strategic Directions Microgrant Program at the University of Houston Libraries." *Journal of Library Innovation*, 5 no. 1 (2013): 55-66, <http://www.libraryinnovation.org/article/view/321>

And, **Angela Rathmel** led a workshop with Lea Currie on analyzing COUNTER usage for Big Deals at NASIG's annual conference in April and May this year.

## Title Changes

Kurt Blythe, Column 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 at [kcblythe@email.unc.edu](mailto: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.]

It's been a slow summer for movement among NASIG members, but we do have a few serious titles that have been added to our colleagues' names:

**Susan Davis**, acquisitions librarian for continuing resources at the University at Buffalo Libraries, is one of the inaugural recipients of the ALCTS Honors Award given by the Association for Library Collections & Technical Services of the American Library Association. The award recognizes "outstanding contributions at all levels within ALCTS, stellar dedication to service, uncompromising commitment to excellence, willingness to accept challenges, and a sustained and exemplary record of moving ALCTS forward." Congratulations Susan for the well-deserved honor! (And for the new title of Honors Award winner!)

Then, beginning July 1, **Angela Rathmel** has been named the interim head of Acquisitions at Kansas University, while also remaining electronic resources librarian until the permanent head is hired.

Finally, a librarian new to NASIG (who I missed adding to "Checking In"), **Andrew Senior**, has been the e-resources librarian (acting) at McGill University for the past ten months. Previously a music cataloging editor, Andrew obtained his MLIS from McGill University in 2013 and finds his present position to be one involving the provision of and maintaining access to databases and e-journals. He writes:

The NASIG web resources were greatly appreciated during my transition to a continuing resources environment and certainly reinforced my decision to join the organization. After almost a year of working with e-journals I can safely say that I have "caught

the bug” and I look forward to attending future NASIG conferences.

## Serials & E-Resource News

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### Report on the Acquisitions Institute at Timberline Lodge

Reported by Rhonda Glazier

If you have never been to the Acquisitions Institute at Timberline Lodge, you are missing a rare treat. First, the location is beautiful. Second, because of the size of the conference, all attendees are present for all sessions. This makes it possible for more in-depth conversation to occur during breaks and meals. By the time the institute has come to a close, not only have you learned a lot, but you have also had time to meet new colleagues and make new friends. The conference this year was kicked off by keynote speaker Michael J. Paulus, Jr. from Seattle Pacific University with a thought-provoking presentation on libraries and culture. He highlighted the role of libraries from the Library of Alexandria to the dystopian view of libraries in literature. Paulus connected libraries to culture and highlighted their societal impact by explaining how libraries preserve the knowledge of the community through collections. The presentation closed with a lively conversation on how libraries fit into society and the role of libraries in literature, with special attention paid to dystopian literature.

Conference presentations ranged from organizational management to evolving library collections and collection analysis, with a presentation on future trends in libraries and collections thrown in for good measure. Kristine Ferry and Keith Powell’s presentation, “Successful Leadership in Middle Management,” included information on the “Four Frame” model developed by Bolman and Deal, and the People Empowerment Pyramid. After introducing these two models, Ferry and Powell walked the conference participants through a series of case studies using these models. The case studies reinforced how to implement

the models and helped participants understand their own strengths and weaknesses in regards to management.

This was followed up by Martha Hruska’s presentation “Restructuring Collection Development & Content Acquisition at the UC San Diego Library.” The UC San Diego Library needed to reorganize because of budget constraints, but more importantly in reaction to format changes in the collection. It is no secret that e-resources are taking up more and more of a library’s collection. Changes were made to the organizational structure of the library. For example, interlibrary loan was merged with acquisitions to create a new department called Content Acquisitions & Resource Sharing. This natural collaboration has led to efficiencies and less duplication of work. This presentation included information on what worked well with the reorganization and lessons learned.

Another session, “Tapping the Talent,” was a panel discussion comprised of vendors and librarians; they tackled the daunting task of laying out the skills needed to work in libraries today. These skills were contrasted with the need to get the campus community into the library. As stated during the panel discussion, “You can have the best collection in the world, but it won’t matter if it isn’t used.” This lively presentation energized and inspired conference attendees to find innovative ways to let go of the past and to find ways to reinvent the library and the perception of the library. Librarians must be out in the community and interacting with faculty and students through various outreach opportunities. The library needs to become personalized to each department and viewed as central to the campus. The panel advocated for creating “engaged liaisons who seek to enhance scholar productivity, to empower learners, and to participate in the entire lifecycle of the research, teaching, and

learning process.” They encouraged all attendees to find out what motivates their university, not the library, and use that information to drive strategic planning and promotion of services. They also advised librarians to look for partnerships on campus and find ways to quantify goals and highlight successes.

Deg Farrelly’s presentation, “Streaming Video: Results of a National Survey of Academic Libraries,” included key findings from a recent survey conducted by Deg and J. Hutchison. Streaming videos have clearly reached the tipping point and are offered by over 70% of academic libraries surveyed. This presentation highlighted important findings in the survey including budgetary implications of streaming videos and the variety of ways that libraries are providing access to this type of content.

Brian Kearn’s presentation, “Electrifying Reference,” discussed how Allegheny College is analyzing the use of their reference collection and determining whether or not this collection should be converted to electronic format. The questions and concerns about making this change were presented and conference participants were asked to analyze the pros and cons of this type of change. They were also challenged to provide insight into the issues surrounding reference collections and the decision to move reference collections from print to electronic format.

Scott Devine’s talk, “Preservation as Curation: The Evolving Role of Preservation in the Management of Print Collections” highlighted not only techniques used in preservation, but also a series of questions that can be used to determine how much preservation a particular title should be given. It is clear that while we are moving towards electronic versions of older materials, there are still titles that should be preserved, and libraries such as Northwestern University have developed a comprehensive program for determining which materials will have basic shelf preservation versus modified shelf preparation or conservation treatment. This preservation initiative will help keep older, rare materials available in the future. There was also discussion on what materials can be digitized with

limited damage and others that cannot be digitized at this time. We are making progress in digitizing older materials because of preservation initiatives

Rhonda Glazier’s presentation, “Don’t Let Print Become the ‘Weeds’ in Your Collection,” articulated the need for libraries to continue to develop print collections. The presentation included information on how to analyze your budget and selection criteria that needs to be considered to ensure that your library is purchasing materials in the best possible format.

It is one thing to build a collection for your own campus or community, it is quite another to build it for a national audience. Thomas H. Teper’s presentation “Building Research Collections in the Area Studies to Serve Nationwide Populations: The Case of University of Illinois at Urbana-Champaign,” articulated the challenges of identifying and analyzing language collections use relative to a large and diverse population. An analysis of the borrowing patterns for language materials was presented along with the challenges encountered by librarians as they try to meet the library’s unique mission.

Heidi Nance’s presentation, “Buy More, Save More: Using ILL Data to Inform Collections Purchases and Reduce Costs,” focused on using ILL data to inform collection purchases and reduce costs. Heidi analyzed ILL data on requests and copyright costs to identify a set of journal titles to purchase. An analysis of the cost to purchase a title versus paying ILL fees was undertaken and by targeting titles for purchase it was possible to reduce ILL costs. Three different acquisition methods were employed: subscribing to a journal, pay-per-view, and using a commercial document provider. The actual use of a title was used to determine which method was the most cost effective. This presentation highlighted budgetary savings that can be realized when librarians take the time to analyze the data that, in most cases, already exists in their system.

A panel discussion, “Exploring the Scholarly Communication Ecosystem,” addressed the future of library collections. Each panelist got out their best

crystal ball and gave their predictions for the future. This lively discussion was followed-up by a presentation by Kim Maxwell from MIT on how her library compared the medical journal holdings of Harvard and MIT. These two campuses have a joint Health Science and Technology Program. By analyzing holdings, it was possible for the library to make more informed purchasing decisions. Her presentation included the methodology used to analyze the two collections and problems and issues encountered when trying to do this type of data analysis. Final conclusions included the need for selectors to work with technical services staff so that consistent coding of data and gathering of data can be done. In addition, it highlighted opportunities for collaborative collection development between campus libraries and perhaps a new discovery tool that can be used across institutions.

The final presentation by Alexa Pearce, "Evaluation of A&I Services for Discovery and Access to Historical Literature," described a citation analysis of history

citations in *Historical Abstracts / America: History & Life, ArticlesPlus, WorldCat, JSTOR* and *Google Scholar*. Alexa's goal was to investigate what the scholarly conversation in history looks like and where scholars go to find it. History researchers at the University of Michigan were asked what tools they use to access history articles. Then, 250 citations were checked against the main history research tools at the library. More work needs to be done before definitive findings can be given, but the consensus of the group was that initial findings warranted further investigation of the topic.

The variety of topics covered and the opportunity to meet and have informal discussions with other attendees made this an enjoyable and thought-provoking conference. Conversations that began in the meeting room spilled over into breaks, lunch, and dinner. By the end of the conference, attendees had been treated to a series of stimulating presentations given against the backdrop of Mount Hood.

## Executive Board Minutes

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### April 2014 Executive Board Meeting

**Date:** April 30, 2012

**Place:** Hilton Fort Worth

#### Attendees

Executive Board:

Jennifer Arnold

Bob Boissy

Chris Brady

Clint Chamberlain

Beverly Geckle

Tim Hagan

Steve Kelley

Selden Lamoureux

Sarah Sutton

Joyce Tenney

Peter Whiting

Ex Officio:

Angela Dresselhaus

Guests:

Michael Hanson and Janice Lindquist, *CPC co-chairs*

Kelli Getz and Anna Creech, *PPC chair and vice chair*

Incoming Vice President/President Elect:

Carol Ann Borchert

Incoming Members-At-Large:

Eugenia Beh

Maria Collins

Wendy Robertson

Regrets:

Shana McDanold



## 1.0 Welcome (Tenney)

Tenney called the meeting to order at 8:30am CST. Introductions were made and ground rules for the meeting were discussed.

## 2.0 CPC (Hanson, Lindquist)

Hanson and Lindquist discussed the logistics for the conference and special event arrangements. They reported that there is Wi-Fi in all of the meeting rooms, as well as Wi-Fi in sleeping rooms as part of the NASIG conference hotel rate. They will post information on access for Wi-Fi at the Registration Desk. The board thanked CPC for all of their work.

## 3.0 PPC (Getz, Creech)

Getz and Creech reported on the process for speaker MOUs. They discussed the new programming features of the Vendor Lightning Talks and Snapshot Sessions. The logistics for these programs were reviewed. The board thanked PPC for all their work.

## 4.0 Sponsorship Vendor Update (Boissy)

Boissy reported that there are 21 vendors this year. Sponsorships totaled a little over \$24,000. We now have 10 Organizational Members and it was confirmed that \$1,000 of each Organizational Membership will be applied to the conference sponsorship totals. That will bring our total for conference sponsorships up to \$35,000. Boissy was thanked for a great job in increasing Organizational Memberships and the conference sponsorship totals.

Boissy noted that for next year additional information for the Vendor Lightning Talks should be included in the solicitation information, as well as information on the benefits of non-commercial organizations becoming Organizational Members or sponsors.

**ACTION ITEM:** Tenney and Geckle will work on process for the 2015 conference.

## 5.0 Secretary's Report

### 5.1 Action Items Update

The Action Items Report submitted by MacDanold was discussed in detail and many items were completed. A revised Action Items Report will be compiled after the meeting.

**ACTION ITEM:** (All) A revised list of Action Items will be confirmed

### 5.2 Approval of Board Activity Report

The following NASIG Executive Board Action Items List was approved by the board.

NASIG Executive Board Actions  
February 2014 – April 2014

3/17 The Executive Board approves the dedication of the 2014 NASIG Proceedings to the memory of Birdie MacLennan.

3/21 The Executive Board approves a donation on behalf of NASIG to the Birdie MacLennan Memorial Fund at the University of Vermont.

3/21 The Executive Board approves the creation of the NASIG Birdie MacLennan Award for the 2015 annual conference.

3/21 The Executive Board approves the migration fee for the back issues of the *NASIG Newsletter*.

4/13 The Executive Board approves the ECC recommendation to change the name of the Electronic Communications Committee to the Communications & Marketing Committee.

## 6.0 Treasurer's Report (Arnold/Geckle)

Arnold reported that NASIG is in solid financial standing. Account balances will be confirmed after all of the conference expenses and deposits have been

completed, but we have over \$500,000.00 in our accounts at this point. Arnold reported that investments accounts are up from last year. NASIG Committees budgets are in good shape and the conference budget will most likely have a surplus. NASIG webinars have offered a strong positive influence on NASIG finances with a total income of \$4,075.00 from webinars for the fiscal year. Arnold and Geckle will work on transfer of duties over the duration of the conference and Geckle will assume the duties of the Treasurer at the close of the conference. Arnold was thanked for her great service to NASIG over the past years.

### **7.0 Committee Reports & Issues Including Newsletter Migration and Consent Agenda**

Various issues from April NASIG Committee Annual

Reports were discussed with the following outcomes/Action Items.

Newsletter migration to Clemson University has hit some snags and will be in process for several weeks. Process is moving forward, just a little slower than expected.

**ACTION ITEM:** Newsletter will make the link to the older issues of the Newsletter more prominent.

A & R had several questions/suggestions on the Mexican Student Grant and the process attached to it. It was agreed that if a member will agree to spearhead the process it will continue. Borchert and Kelley will approach a NASIG member to see if it will be possible. There was a detailed discussion on methods of making the process/award more valuable for all involved. It was agreed that if there was no one able to spearhead the award, it would be put on hold indefinitely. The idea of making webinars available internationally to library school students was generally favored.

**ACTION ITEM:** Borchert and Kelley will discuss with NASIG member the idea of spearheading the Mexican Student Grant process.

**ACTION ITEM:** Chamberlain and Beh will ask CEC and SOC to try a pilot of making webinars available to library school students internationally.

MDC had a variety of suggestions/questions. After discussion, the following information will be relayed back to MDC with thanks for their thoughtful discussions. Lifetime memberships will probably not appeal to entry level librarians, but the main focus for this category is more mid-career, so at this time we will keep the amount as proposed by FDC and see how it goes. The board encourages MDC to follow through on the suggestions to reach out to Library Directors and Deans and possibly Library HR Departments on the benefits of joining NASIG and provide testimonials on the benefits of a NASIG membership. Perhaps MDC would work with the 30<sup>th</sup> Anniversary Task Group on this part of the project. MDC is encouraged to work with SOC on the idea of providing information to library schools on the membership benefits of NASIG. Sutton will ask MDC for specifics of placement of information on membership benefits on the website. It was not clear what would improve the current placement of information on membership benefits. Finally, MDC proposed encouraging corporate or commercial members to promote NASIG on their social media pages. The board agrees this is a good idea, and if MDC has time to pursue this it would add visibility to NASIG. Sutton will remind MDC that if they need additional resources to pursue some of these ideas, to work with the Treasure to get money added to their committee budget. Thanks to MDC.

N & E submitted a report of actions during the year and some suggestions/comments on the process. The committee will be working on a formal manual. During the year it was determined that the committee documentation was just a set of emails with some descriptive information. Each standing committee for NASIG should have a formal committee manual. N & E will pursue this action during the coming year. N & E was encouraged to develop a firm timeline in May 2014 to allow for the announcement of the new board members at least 6 weeks before the 2015 conference. This will allow for transition information and travel

arrangements to be made in a timely manner. Also, a review of the vetting process to determine if any proposed updates or clarifications are needed to assist the committee as it moves forward.

**ACTION ITEM:** Borchert will ask the committee to finalize their manual in the 2014/2015 year. Borchert will ask the committee to develop a timeline for the election process to allow for at least a 6 week period between the announcement of newly elected board members and the annual conference.

### **7.0 Student Rate for Conference (Brady/Sutton)**

SOC is working on the proposal for a Student Rate for the annual conference. After this conference closes and they determine how the process went this year, they will offer a detailed proposal.

**ACTION ITEM:** Beh will encourage SOC to have their proposal ready by the fall board meeting.

### **8.0 Survey Updates**

#### **8.1 MDC- Survey for Members Not Attending Conference (Brady)**

Brady reported that MDC had completed the survey and was in the process of compiling the results. There was an excellent response rate of 30%. The survey went to NASIG members not attending the Buffalo conference to see what issues impacted their decision not to attend. Preliminary results indicated many responses on location and content, but several comments offered conflicting information.

#### **8.2 SOC-Survey for Information School Attendees (Sutton)**

Sutton reported this is still in process. Additional information will be sent as available.

### **9.0 Serialst Home (Tenney)**

Tenney opened discussion on the proposal to move the Serialst listserv to NASIG. The moderators of the discussion group had sent a proposal to move Serialst to NASIG after the untimely death of Birdie MacLennan at University of Vermont. The board agreed that it was an excellent idea and a good fit for NASIG. Logistical issues were discussed.

**ACTION ITEM:** Borchert and Kelley will discuss next steps and transition issues with current Serialst moderators.

**ACTION ITEM:** Borchert will appoint a Serialst coordinator and a small number of additional members (1-2) to be a subgroup of CMC to manage the listserv.

**ACTION ITEM:** Borchert will ask the appointed Serialst coordinator to investigate what is needed technically and logistically to run the listserv and develop an action plan. The current Beenet structure and the current set up at University of Vermont should be investigated.

### **10.0 Ideas for More Non-Library Based Member Engagement (Tenney)**

Tenney asked for ideas on obtaining nominees for the board from the commercial/non-library based membership pool. There was difficulty this year in obtaining nominees to run for office. It was noted that if NASIG had some administrative staff to ease the burden of work on board members, it might be easier to get broader participation. It was also noted that we need to expand the pool of those in non-university/academic libraries to offer broader representation. A suggestion was made to offer a more attractive one or two day conference rate for public librarians.

**ACTION ITEM:** Sutton will ask MDC to investigate ways to engage public librarians in the DC area.

### **11.0 Any Discussion Requests from Vision and Mission Task Force/SSP Joint Program (Kelly)**

Kelley reported on the initial discussions of the 30<sup>th</sup> Anniversary Task Force. The board agreed to a budget of \$25,000 for special events for the 30<sup>th</sup> Anniversary Task Force during the conference. It was agreed that Friday evening would probably be the best day to have any special event, due to the scheduling of the joint meeting with SSP.

Kelley reported that the Vision and Mission Task Force has started discussions. The Task Force is composed of the following people: chair, Steve Oberg, members-Betsy Appleton, Rick Anderson, Patrick Carr, Lauren Corbett, Tina Feick, and October Ivins. Additional information will be forthcoming from this group.

Kelley reported on the SSP/NASIG joint program at the 2015 Annual NASIG Conference. There are a number of scheduling issues to be discussed. It is not clear if the joint program will be a full day or half day on Wednesday. There was a lengthy discussion of how the joint program and overall NASIG conference schedule could possibly look. Kelley will take suggestions back to the planning group. It was agreed that the hotel room block could be changed to incorporate more room nights on the Tuesday night and fewer on Saturday night.

**ACTION ITEM:** Tenney will contact the Hilton in DC to discuss the change in room block.

### **12.0 Any Transition Issues Including Review of Old Action Items for Transfer to New Board Members**

Kelley noted that the Action Items updates were completed earlier in the meeting. There were questions on board reimbursements and the guidelines were reviewed.

### **13.0 Old Business**

Boissy reintroduced the discussion of having a paid administrative staff member for NASIG. In principle the

idea was favorably received. Tenney will send the document from the Task Group that was charged with investigating this possibility several years ago. It was agreed that discussions on this issue would continue at future meetings.

### **14.0 New Business**

No new business was proposed.

Tenney thanked the board for a productive year.

Lamoureux moved to adjourn the meeting at 4:00pm CST. Hagan seconded and the meeting was adjourned.

Respectfully submitted,  
Joyce Tenney  
Approved 5/15/14

## **NASIG Board Conference Call June 24, 2014**

### **Attendees**

#### Executive Board:

Steve Kelley, President  
Joyce Tenney, Past-President  
Carol Ann Borchert, Vice President/President-Elect  
Shana McDanold, Secretary  
Beverly Geckle, Treasurer

#### Members at Large:

Clint Chamberlain  
Maria Collins  
Wendy Robertson  
Sarah Sutton  
Peter Whiting

#### Regrets:

Eugenia Beh, Member at Large  
Anne McKee, Conference Coordinator  
Kate Moore, Ex Officio

## 1.0 Welcome

The meeting was called to order at 3:05pm.  
Roll call.

## 2.0 CPC Update (Tenney)

Tenney reports the CPC is currently working on a theme and logo. They had a recent tour of the hotel, and the renovations are complete. The CPC Chairs met the conference services manager and the changes to the room blocks have been completed. The CPC is now waiting on a schedule from the PPC for the conference and the SSP joint meeting schedule.

Tenney will email room confirmation for the Fall Board meeting when they are available.

## 3.0 PPC Update (Kelley)

Kelley reports there is no PPC activity yet. They are waiting on SSP information.

## 4.0 Joint NASIG-SSP Programming Update (Kelley)

SSP took the initial plan to their Board, and Board was not comfortable with joint-keynote as opener (largely due to space requirements). SSP typically holds their keynote from 4-5pm. They have set it up so their conference will run concurrently with ours and the SSP Board wants to handle the joint programming as a pre-conference for their attendees.

Tenney sent the proposed schedule, which has NASIG folks leaving the joint program at 4pm for our opening reception and first-timers reception. NASIG conference would start on Wed. evening and run through mid-day Sat. and would still have 3 vision speakers. The vendor expo will be over lunch and into the afternoon on Friday (break in Expo area; noon-5pm).

The joint programming with SSP will not include the keynote. Instead it will run from 9am-3:30pm with each group having their own individual keynote after the joint program ends. NASIG will offer a box lunch with

discussion/topic tables, with the goal of mixing SSP and NASIG folks for networking/interaction.

For NASIG the joint programming would be included in the conference registration; SSP will treat it as a separate pre-conference registration event.

## 5.0 30th Anniversary Task Force Update (Borchert)

Borchert reports that the TF is just getting started and there's nothing to report yet. The group has been discussing t-shirts and other memorabilia.

## 6.0 Vision & Mission Update (Kelley)

The Vision & Mission TF are deep in discussion, currently talking about tag-lines for the organization.

## 7.0 Financial Update (Geckle)

Geckle briefed the Board on her conversation with NASIG's financial advisor. He recommended moving a defined amount of our savings into a bond account to diversify our funds. There are no fees if we keep money in the bond account for at least 1 year.

**VOTE:** Borchert moved to move \$115,000 from savings into PONCX bonds account; seconded by Whiting.

**ACTION ITEM:** McDanold will set up a Doodle Poll for the VOTE to move the monies. Vote by COB on July 3, 2014.

Geckle is reviewing the 2014 conference financials, and current estimates show a \$37,000 profit.

## 8.0 SERIALST Update

Borchert has talked with BeeNet (runs on Lyrus software) and L-Soft (ListPlex software) as possible hosts for SERIALST, which approximately 3,200 members. University of Vermont has indicated they need/want to hand the list off as soon as possible.

L-Soft reports it would cost \$500 to migrate to their servers, and \$500 to host. Ongoing, the annual fee would be \$500 for hosting and management, but NASIG would be responsible for moderation. They also charge a fee of \$2.50 per message per 1000 delivery attempts. At approximately 3,200 members, it would cost \$8 per message to distribute to subscribers. Additionally, L-Soft sends an error message if a message is rejected. BeeNet has no error message function. The transition from the University of Vermont's servers to L-Soft's servers should be smooth as they are the same service, just different hosts.

Kelley proposes that we designate the Taylor & Francis conference proceeding monies (\$14,000 to NASIG currently) to fund/support the SERIALST listserv.

Borchert will also follow up with L-Soft about the list's archives and migration/management costs, currently also housed at the University of Vermont.

**VOTE 1:** NASIG takes over SERIALST and designate the monies from Taylor & Francis proceedings publication to maintain the SERIALST listserv.

Motion from Tenney; seconded by McDanold.

**VOTE 2:** Pursue L-Soft as the hosting service for the SERIALST listserv.

Motion from Borchert; seconded by Whiting.

**ACTION ITEM:** McDanold will set up a Doodle Poll for the 2 VOTES related to the listserv. Vote by COB on July 3, 2014.

Borchert will follow up with L-Soft about migrating and managing the SERIALST archive.

Anne Ercelawn, Bob Persing, and Steven Clark have the University of Vermont contact information and Borchert has contact with L-Soft. Borchert will work to put L-Soft and University of Vermont in touch to discuss details.

**ACTION ITEM:** SERIALST ongoing coordination requires an additional individual assigned to CMC as the SERIALIST moderator position, with the committee as back-up. (Borchert)

### 9.0 Organizational Name Change (Kelley)

Kelley will begin conversation in next Presidential column in the *Newsletter* about changing the name and follow up with messages to NASIG and SERIALST listserv. Kelley will send the column draft to the Board for input before submitting.

**VOTE:** Motion to begin discussions to change name from North American Serials Interest Group to NASIG from Borchert; seconded by Robertson.

**ACTION ITEM:** McDanold will set up a Doodle Poll for the VOTE related to changing NASIG to acronym. Vote by COB on July 3, 2014.

The goal is to vote on changing the name and adopt the new vision and mission statement at same time, preferably at the 2015 Conference to coincide with our 30<sup>th</sup> anniversary.

Geckle contacted our accountant about financial issues and name change steps. He recommended we hire a lawyer to manage the name change to ensure nothing is missed for an organization with non-profit status.

Tenney will begin inquiries about cost of an initial consultation with an association attorney.

### 10.0 Site Selection Update (Kelley)

Site selection for the 2016 and 2017 conferences were discussed by the Board.

### 11.0 Anti-Harassment Policy (Robertson)

Robertson would like to construct a more formal/extensive code of conduct statement that will be posted with a link to it on Conference pages (FAQ and registration pages).

A few examples of conferences that have policies:

Example/template:

[http://geekfeminism.wikia.com/wiki/Conference\\_anti-harassment/Policy](http://geekfeminism.wikia.com/wiki/Conference_anti-harassment/Policy)

Adoption:

[http://geekfeminism.wikia.com/wiki/Conference\\_anti-harassment/Adoption](http://geekfeminism.wikia.com/wiki/Conference_anti-harassment/Adoption)

Ada Initiative example: <https://adainitiative.org/what-we-do/conference-policies/>

We have a brief statement as part of the Vision statement:

[http://www.nasig.org/site\\_page.cfm?pk\\_association\\_webpage=186](http://www.nasig.org/site_page.cfm?pk_association_webpage=186)

"NASIG is an independent organization that promotes communication, understanding, and sharing of ideas among all members of the serials information community. As such, we support a professional, courteous atmosphere for all. Should any issues or concerns arise, please contact a member of the executive board in person, at the conference, or at [board@nasig.org](mailto:board@nasig.org)."

**ACTION ITEM:** Robertson will put together a draft for the NASIG Board to review.

## **12.0 Core Competencies for Scholarly Communications Librarians**

The Board agrees that we need to define a new Task Group to take on the Core Competencies for Scholarly Communications Librarians. Angela Dresselhaus is interested in being on the task force.

**ACTION ITEM:** Draft a charge for Scholarly Communications Task Force for the Board to review. (Sutton)

Meeting adjourned at 4:30pm.

Minutes Submitted by:  
Shana McDanold

Secretary, NASIG Executive Board

## **NASIG Board Conference Call August 13, 2014**

### **Attendees**

Executive Board:

Steve Kelley, President

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Clint Chamberlain

Maria Collins

Wendy Robertson

Sarah Sutton

Peter Whiting

Ex: Officio:

Kate Moore

Regrets:

Anne McKee, Conference Coordinator

### **1.0 Welcome**

The meeting was called to order at 4:14pm. The delay was due to technical difficulties. Roll call.

### **2.0 CPC Update (Tenney)**

Tenney reports that CPC is currently working on the logo design.

Ted Westervelt will be the host for the Board dinner on Sun., Oct. 5, 2014 at 6pm at Café Italia (Arlington location is in Crystal City; <http://www.cafeitaliarestaurantva.com/>).

**ACTION ITEM:** McDanold will set up a Doodle poll for headcount of dinner attendees after Labor Day.

### **3.0 PPC Update (Kelley)**

Kelley reports that PPC is currently getting in touch with potential vision speakers.

The committee has submitted their newsletter update.

### **4.0 Joint NASIG-SSP Programming Update (Kelley)**

SSP has asked for a 9am-3:30pm time frame for the joint programming day. They are currently discussing possibilities for programming but have nothing concrete yet.

They are also working on title/theme for joint-programming day. One possible title/theme under discussion is "Evolving Information Policies and Their Implications: A Conversation for Librarians and Publishers".

### **5.0 30<sup>th</sup> Anniversary Task Force Update (Borchert)**

Borchert reports the Task Force will be meeting by the end of August and have nothing new to report at this time.

### **6.0 Vision & Mission Update/Name Change Update (Kelley)**

Conference call set for next Friday (Aug. 22, 2014). Kelley's first column about the updates to the vision/mission statements and possible name change will be published in the Sept. newsletter. Moore reports the column is currently in copyediting and will be online by next week. Column contains vision and mission group, with roster, and discusses idea of name change. Kelley will email preview of the column to the Board.

### **7.0 SERIALST Update (Borchert)**

Borchert emailed update to Board with current status. The server changeover is happening on Monday, Aug. 18, 2014. The official announcement to subscribers is going out on Friday, Aug. 15, 2014.

### **8.0 Anti-Harassment Policy (Robertson)**

Robertson is working on a code of conduct policy draft. After discussion, the Board can approve the policy, release and publish it immediately after approval, with the note that if members have comments/questions to contact the Board.

For the policy to be in effect for the 2015 conference, it must be in place before registration opens for the 2015 conference.

### **9.0 Core Competencies for Scholarly Communication Librarians (Sutton)**

Draft charge will be sent to Board for approval.

Current draft charge:

"Draft charge to the Core Competencies Task Force: To develop a statement for NASIG's endorsement that describes core competencies for librarians whose professional responsibilities include a large component of work in the highly collaborative environment related to digital scholarship and scholarly communications. The purpose of this/these statements is to provide librarian educators with a basis for developing curriculum with a specialized focus and to provide employers with a basis for describing these specialized positions and with criteria upon which to evaluate the performance of those who hold them. The statement will be based on current research and complement ALA's Core Competences for Librarianship. The statement will also be flexible enough to remain relevant in the face of constant change and advances in technology as it is applied to digital scholarship and scholarly communication."

**ACTION ITEM:** McDanold will post a Doodle poll to approve the Core Competencies for Scholarly Communication Librarians charge.

Send suggestions Task Force for members to Borchert. The Task Force will be formed once the charge is approved by the Board.



Kelley forwarded an email to the Board about the Library Publishing Coalition (<http://www.librarypublishing.org/>). The Coalition has a "Strategic Affiliate" category that NASIG could join. Benefits for NASIG include exposure and cooperative activities. Robertson is on the Membership Committee for the Library Publishing Coalition. The focus is on scholarly publishing in the library publishing world. The LPC was officially launched in July 1, 2014.

**ACTION ITEM:** Kelley will contact Katherine Skinner at the LPC for more information and to discuss what is involved.

### 10.0 Old Business (All)

McDanold updated the Board on the conference call minutes. Will have both June and Aug. conference call by end of August for review and approval.

### 11.0 New Business (All)

Whiting inquired about the Membership Development Committee survey of members that didn't attend the Buffalo 2013 conference. Have they sent a report to the Board? Sutton will follow up as MDC liaison to find out. The Board would also like them to survey the members that didn't attend the 2014 conference for comparison.

**ACTION ITEM:** Sutton will ask the Membership Development Committee about their survey of members that did not attend the 2013 conference in

Buffalo and ask them to also survey members that did not attend the 2014 conference in Ft. Worth.

Collins shared an update about the conference proceedings. There is some inconsistent language on the Taylor & Francis website versus the NASIG author agreement regarding post-print and pre-print language in any depositories. The language will be made consistent to prevent confusion.

Chamberlain provided an update on the NISO webinar partnership. Our 2014 webinars have been very successful thus far. NISO has contacted the CEC expressing interest in partnering again for 2015 webinars. The Board is in solid support of continuing the partnership.

### 12.0 Fall Board Meeting

Please make your travel arrangements for the Fall Board Meeting Oct. 6 as soon as possible. If you need to change your hotel reservations please let Tenney know immediately so she can let the hotel know.

Continental breakfast will start at 8am, and the meeting starts at 8:30am. CPC, PPC, and Site Selection will be the first three agenda items.

Meeting adjourned at 4:52pm.

Minutes submitted by:  
Shana McDanold  
Secretary, NASIG Executive Board

## Committee Reports

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### 2014 Mentoring Group Annual Report

Submitted by: Simona Tabacaru

#### Members

Susan Davis, chair (University at Buffalo-SUNY)  
Simona Tabacaru, vice-chair (Texas A&M

University)

Ann Ercelawn, member (Vanderbilt University)  
Maria Collins, board liaison (North Carolina State University)

#### Continuing Activities

With the departure of the past chair and resignation of

the in-coming chair from the committee, all current Mentoring Group members are new. However, we managed to quickly learn our responsibilities and continue the committee activities in an orderly fashion. A third member was added this year, which will help add continuity to future committees and will provide valuable assistance as needed, especially during the planning and coordination of the first-timers reception.

### Completed Activities

Overall, the Mentoring Program at the 2014 Conference was a success. Thirty-one mentor/mentee pairs were matched prior to the conference, and additional pairs were matched during the First Timers/Mentoring Reception on the first day of the conference.

For the first time, the first-timers reception was held at a location other than the conference hotel. There was some concern regarding the meeting, organizing and proper transportation of mentors and mentees to Billy Bob's Texas Club. Mentors and mentees met in the conference hotel lobby and suitable transportation to the reception was provided.

The First Timers/Mentoring Reception was well attended not only by pairs of mentors and mentees, but also by first-time attendees who had not registered as mentees before the conference. With the help of some experienced NASIG members at the reception, mentees were matched with mentors on-the-spot. In the future, we will continue to send out a call to those experienced NASIG conference attendees and invite them to attend the reception, even if they are not paired with a mentee prior to the conference.

Our thanks goes to those NASIG conference attendees who did attend the 2014 reception (including several Board members and volunteers from the Continuing Education committee) and were gracious enough to step in as mentors at the last minute.

After the 2014 conference, the Mentoring Group conducted a survey of 2014 mentors and mentees about their experience. The survey was conducted via

the NASIG Admin website and we received a total of thirty-two responses, which represents a 51.6% response rate. The response rate is lower than in previous years and is likely due in part to the survey being administered a month after the conference closed instead of shortly after the conference. The unexpected resignation of the incoming chair impacted this year's survey process, but we expect a more timely feedback process for 2015.

A summary of responses to the 2014 Mentoring program evaluation survey is provided below:

- Eighteen mentors and fourteen mentees responded to the survey.
- In answer to the question "What was your favorite part of the experience?" mentors reported:
  - Meeting a new person
  - Sharing knowledge and experience, and learning more about their mentee
  - Helping or guiding someone new to NASIG; making first-timers feel more comfortable and answering their questions
  - "The chance to talk while taking the bus to our opening night, and also at the first timer's reception."
- In answer to same question, "What was your favorite part of the experience?", mentees reported:
  - Being able to network and talk one-on-one with experienced librarians
  - Being introduced to other NASIG members and receiving information about the conference
  - "I met several people while waiting for our mentors in the lobby. That alone was valuable, but having someone to guide me was invaluable."
  - "Had time to talk to my mentor about my career plan and obtained advice and information."
  - "I had no mentor-relationship experiences at all; I did not have a favorite experience on which to comment."

- First Timers were also asked if the program was of value to them, and if the answer was positive or not, they were asked to comment why.
  - The program helped new comers to feel welcome, network, get answers to their questions before coming to conference, become comfortable (“It can be intimidating to attend a conference for the first time”) and even get involved during the conference.
  - The opportunity to discuss with experienced serials librarians was also mentioned
- In answer to the question “Have you suggestions for improving the program?” mentors reported:
  - “It was really difficult for my mentee and I to talk because it was so noisy. I would much prefer a separate event, in a location where conversation is actually possible.”
  - “The method for meeting and matching up needs to be communicated beforehand. (If it was, I don't remember it).”
  - “Meeting up with the mentees in the hotel lobby was not very organized. After waiting around a while and not finding my mentee, I got on the bus and accidentally sat down next to him.”
  - “Probably a short speech of welcome from one of the Executive Board Officers would be nice. Nothing long, but maybe a few words about NASIG and a few words of Welcome.”
  - “I would like to be paired with someone in my contiguous region so there is the possibility to meet in person before the conference.”
- In answer to the same question, “Have you suggestions for improving the program?”, mentees reported:
  - Reception held in a quieter place; due to loud music and noise - it was hard to have conversations with mentors and other mentees
  - “Giving a drink coupon to mentors would be really nice, since they put their time in initiating new conference members and make them feel at ease.”
  - “Have a back-up plan in place if a mentor or mentee has to drop out for any reason.”
    - “Nope. I thought it was very well-organized from my perspective.”
- 90.6% (29) respondents confirmed they would participate in the Mentoring program again, while 9.4% (3) provided no response to this question. This may indicate that most mentors/mentees had a good experience, and it was gratifying to see that no respondent had a “poor” experience during the 2014 Mentoring program/reception.

There were few other comments, noting that the NASIG community was very friendly and “everyone seemed quick to want to assist and guide first-timers.” Both mentors and mentees seemed to value the Mentoring program and suggestions made to improve the program were valuable. These suggestions will be carefully analyzed and considered by committee members for next year’s conference.

The outgoing chair, incoming chair, vice-chair, new member and board liaison met during the conference to briefly discuss committee members’ roles and activities for the upcoming year. These included conducting and analyzing the Mentoring Post-Conference Survey, and writing the group’s annual report.

### **Budget**

The Mentoring Group does not require funding for its activities for 2014/15.

Submitted on: August 18, 2014

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Board Liaison:	Wendy Robertson University of Iowa

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Send submissions and editorial comments to:

**Kate B. Moore**

Indiana University Southeast Library  
New Albany, Indiana  
Phone: 812-941-2189  
Email: [kabmoore@ius.edu](mailto:kabmoore@ius.edu)

Send all items for "Checking In", "Citations," & "Title Changes" to:

**Kurt Blythe**

University of North Carolina, Chapel Hill  
Email: [kblythe@email.unc.edu](mailto:kblythe@email.unc.edu)

Send inquiries concerning the NASIG organization and membership to:

**Shana L McDanold**

Head, Metadata Services Unit  
Georgetown University  
Lauinger Library  
37th and O Streets, N.W.  
Washington, DC 20057-1174  
United States  
Phone: 202-687-3356  
Email: [membership@nasig.org](mailto:membership@nasig.org)