

NASIG Newsletter

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President's Corner

Carol Ann Borchert

Just two months after our 30th successful NASIG conference, and it seems like the summer is flying by! Facebook alerted me this morning that on this day last year in July, I was in Ireland on a walking tour. Ah, sweet memories...

And what a busy year it has been! Many of you heard Steve Kelley's President's Report at the conference regarding what we accomplished last year. Now that we have changed the name from North American Serials Interest Group to NASIG and have expanded our Vision and Mission statement, we hope to work on rebuilding our membership numbers this year. Steve announced a new tagline for NASIG at the conference of "Advancing and transforming the information resources community." After some feedback from several people that such a tagline was longer than any of us would remember, the board voted to shorten it to "Transforming the information community." As NASIG evolves over the next several years, we may alter the tagline to reflect our identity at that time, but will be able to still keep the NASIG brand.

We have also appointed two new task forces this year: the Financial Planning Task Force, chaired by Peter Whiting, and the Archives Task Force, chaired by Sara Bahnmaier. The Financial Planning Task Force will draft a financial plan with recommended financial goals for the next five year period. The Archives Task Force will be making recommendations for the best way(s) to preserve NASIG's archival material.

And in other news, the board voted to approve and adopt the final Core Competencies for Print Serials at the close of the conference. This document can be used by employers to document the skills needed for this aspect of librarianship. The idea for this document grew from the Core Competencies for Electronic Resources Librarians. As the task force was collecting those competencies, they realized that print serials work has its own, slightly separate, skill set. A big thank you to the task force for completing this additional task! In the meantime, we have a new task force that is working on Core Competencies for Scholarly Communications Librarians. We are looking forward to the product of that endeavor as well. These documents are being posted in the [Core Competencies](#) page of our website under Continuing Education.

Also now posted on the NASIG website are the criteria for site selection. After the discussion about Indianapolis and its legislation earlier this year, several of the NASIG members asked what criteria we are using in site selection and requested that such a list be made available. The Criteria Examined in Selecting Sites for NASIG Annual Conferences is available on the [Site Selection Committee](#) webpage.

While I'm on the subject of thanking folks, let me add my gratitude to that expressed by our previous president for all of the phenomenal work that went into the conference and program planning for our 30th Annual Conference. We had a successful day of joint programming with the Society for Scholarly Publishing at the front end of the conference, and a fun night of special events from the 30th Anniversary Task Force. I

was told by one attendee that this upcoming conference in Albuquerque has a lot to live up to, but I'm sure our folks are up to the job. Next year's conference will be at the beautiful Albuquerque Hotel in Old Town, from June 9-12, 2016. Please mark your calendars and plan to attend, and keep an eye out for the coming call for proposals this fall. If you have an idea for a program, please do submit it!

Call for Volunteers

Anna Creech, NASIG Vice President/President-Elect

NASIG is a volunteer-based organization, and we rely on you and your efforts to keep us moving forward. Not only do you help the organization, but you have a chance to get to know and work alongside other great NASIG members.

Most NASIG committee work is done via email and conference calls. You are not required to attend the conference, though we do encourage it.

Occasionally, committee members must step down from their appointments mid-term. If you would like to serve on a committee but did not submit a volunteer form in time for this year's appointments, it's not too late!

Please consider volunteering to serve on a NASIG committee by following the link below and filling out the form: <http://goo.gl/S3qx6T>.

Interview with Angela Dresselhaus, the 2015 Merriman Award Winner

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

My current position is head of electronic and continuing resources acquisition at East Carolina University. I manage the Electronic and Continuing Resources Acquisition Department, consisting of three staff

members and one faculty librarian. We are responsible for acquisition and access for journals, databases, and other electronic resources. My first job was in print serial acquisitions, then I moved to serials cataloging, and finally I've landed in electronic resource management.

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

A supervisor encouraged me to apply for the Fritz Swartz Serials Education Scholarship, and after winning that award in 2007, I stayed active in NASIG. NASIG service has been a rewarding experience for me and I enjoy the friends and professional contacts I have made over the years. Attending the NASIG conference is not only a great learning opportunity for me, but a chance to meet up with friends.

What prompted you to apply for the Merriman award?

A curiosity about the UKSG conference prompted me to apply for the award. I wanted to experience the conference that inspired NASIG. On a personal note, I'm a Doctor Who fan and I longed to be around other Whovians.

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

I reacted by promptly driving 8 hours to the Seattle Passport Office! Unfortunately, I discovered that my passport was missing and after turning my apartment upside down I had no other choice but to present myself at a passport agency. On the upside, I was able to get a passport for my infant so my entire family was able to go to Scotland.

What were your first impressions of the UKSG conference?

My first impression was that the conference had a narrow focus on how the library can serve researchers and provide services to grant funded scholars. Second impression... I needed to ask a bunch of question about acronyms and open access mandates in the UK.

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

International travel will be on my radar and I may consider preparing a paper for a future UKSG conference.

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

In my experience, many NASIG sessions are practically oriented, and less focused on scholarship. UKSG concentrated more on the impact librarians have on researchers, and there was a selection of breakout sessions that presented study findings. I'd like to see more of that at NASIG.

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

Rick Anderson's plenary, "A quiet culture war in research libraries," spoke to me. I've struggled with defining where I fit on the solider/revolutionary spectrum and Rick's talk reminded me that it is okay to be a foot soldier and not out ahead leading a revolution.

What are the differences between the two organizations, USKG and NASIG?

Non-librarian participation seemed to be higher at the UKSG conference, but I'm not sure if that gets to the question at hand.

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

I am a quiet person and I knew that traveling to and attending a conference so far away from home would be a challenge for me socially. It was a challenge, but there were so many warm welcoming people that I felt just fine quietly enjoying the UKSG conference. My advice, set aside worries and just apply for the award.

Upcoming Conference News

CPC Update

Mary Ann Jones and Betsy Appleton,
CPC co-chairs

NASIG's 31st annual conference will take place in Albuquerque, New Mexico from Thursday, June 9th through Sunday, June 12th. The conference will be held at the Hotel Albuquerque in the heart of Old Town Albuquerque. When not attending lively NASIG events or conference sessions, walk out the hotel to visit the adjacent restaurants, museums, galleries, and boutiques in this vibrant location. Hotel Albuquerque is about a 15-minute ride from the Albuquerque International Sunport Airport, easily accessible via I-40 and, of course, just off Historic Route 66. Stay tuned for more exciting information from CPC about our 2016 conference!

Please contact the Conference Planning Committee if you have any questions and we look forward to seeing you next June!

PPC Update: Call for Proposals

October 1st – November 15th

Danielle Williams, PPC chair
& Corrie March, PPC vice-chair

The Program Planning Committee will hold one Call for Proposals from October 1st – November 15th, 2015 for the 2016 NASIG Annual Conference. More information regarding the proposal submission process will be available in the coming weeks.

PPC is currently discussing potential vision speakers, as well as practical, hands-on workshops for the pre-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 if you have any questions or recommendations.

Post Conference Wrap-up

2015 Conference Evaluation Report NASIG at 30: Building the Digital Future May 27-30, 2015

Submitted by

2015 Evaluation and Assessment Committee:
Bridget Euliano (chair), Derek Marshall (vice-chair),
Melody Dale, Michael Fernandez, Kathryn Johns-
Masten, Jane Smith and Kathryn Wesley

The 30th annual NASIG conference was held in Washington, DC. The conference offered the NASIG-Society for Scholarly Publishing (SSP) Joint Meeting, five post-conference workshops, three vision sessions, thirty-one concurrent sessions, seven "great ideas" sessions, six snapshot sessions and a vendor lightning

talk session. Other events included an opening reception, first timer's reception, informal discussion groups, a vendor expo, and a 30th anniversary dessert celebration.

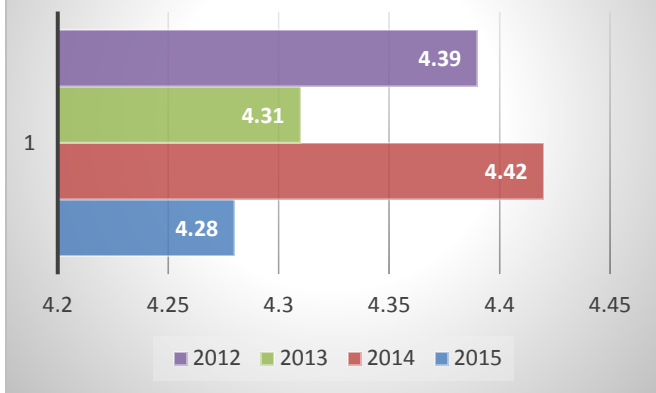
231 surveys were submitted from 380 conference attendees. Survey respondents could enter a name and email address for a chance to win a \$50 gift card. Nancy Bennett from Carroll University was the winner.

Below is a summary of the survey results.

Conference Rating

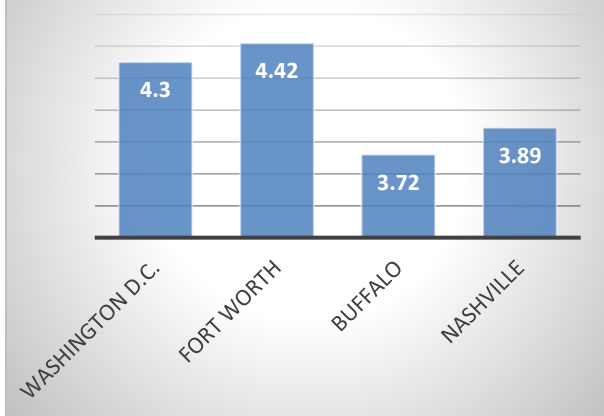
Respondents were asked to give ratings on a Likert scale of 1 to 5, with 5 being the highest. The overall rating of the 2015 conference was 4.28. This was a bit lower than in previous years.

Overall Conference Rating



Facilities and Local Arrangements

Geographic Location

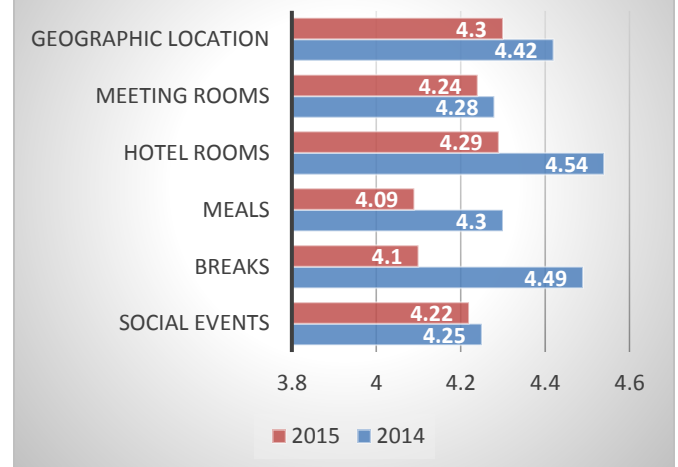


The 2015 rating was 4.3, a slight decline from the 2014 location of Fort Worth, which rated a 4.42. However, this year's rating was higher than Buffalo's rating of 3.72 and Nashville's rating of 3.89 in 2013 and 2012, respectively.

Fifty-nine comments were entered on the survey about local arrangements and facilities mentioning a variety of issues. Meeting room space appeared to be a large factor with several attendees noting the rooms were either too small or too large for particular sessions. There were also several who mentioned that the conference was not in Washington D.C. proper and that there was an overall lack of easy access to tourist

destinations. There were many compliments on the food and hotel service; however, there were a few comments that concerned the proper labeling of food for those with allergies.

Local Arrangements



Seventy-five percent of survey respondents brought a laptop or a tablet to the conference. Fifty-five percent of respondents rated a high importance on wireless access availability in meeting rooms.

Website, Blog and Schedule

The majority of survey respondents rated the layout and explanation of programs as 3 or higher on the Likert scale with 44.28% assigning a rating of 5.

The conference website received a weighted average of 4.18. The conference blog was rated less highly at 3.77. Many of the commenters noted they did not take advantage of the conference blog.

NASIG-SSP Joint Meeting

Prior to the Opening Session, the 2015 NASIG conference featured a special joint meeting between NASIG and SSP (Society for Scholarly Publishing). It featured three keynote sessions and two other sessions. The joint meeting was well received by NASIG members in attendance. Eighty-one percent of respondents said they benefited from attending the joint meeting.

Seventy-one percent said they would like to see more joint meetings with other organizations in the future.

Post-Conferences

Eighty-seven percent of respondents noted they did not attend a post-conference.

Vision Sessions

Three vision sessions were a part of the 2015 conference. The average overall ratings for the three sessions ranged from 3.89 to 4.10. Dorothea Salo's presentation style was not to everyone's liking but many praised her talk on user privacy as one that made them really think about an important topic. The comments on Stephen Rhind-Tutt's session expressed passion about open access issues. Many respondents appreciated the questions and discussion his open access views generated. Some commenters felt that Anne Kenney's talk on electronic journal preservation should have been a strategy session as opposed to a vision session.

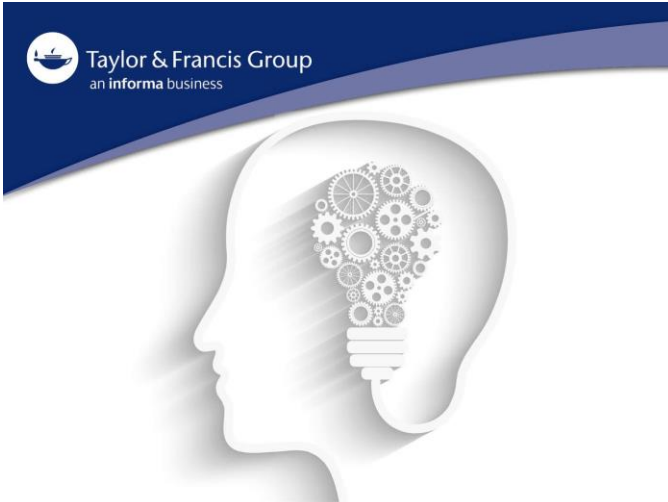
Other Sessions

NASIG offered thirty-one concurrent sessions during the 30th annual conference. Twenty-four of those (77%) received an overall rating of 4.0 or higher. The number of sessions offered was lower than last year's conference in Fort Worth. Most comments were positive, or offered specific, constructive criticism of an individual session. Feedback will be shared with presenters upon request.

2015 marked the third year of the Great Ideas Showcase, formerly called poster sessions. While only four participants were featured in 2014, there were seven in 2015. The overall rating for the Great Ideas Showcase was 3.72. The showcase sessions did not generate many evaluation comments. Some commenters felt the showcase should not have been held at the same time as the snapshot sessions.

The 30th conference was the second year to offer snapshot sessions, "designed for 5-7 minute talks in which projects, workflows, or ideas are presented." There were six sessions, two of which were rated 4.0 or higher. Due to an oversight by the Evaluation & Assessment Committee, there was no comment box for the snapshot sessions.

The survey requested that responders rate and comment on ideas for future programming. Comments were entered with general and specific ideas for various types of sessions. A detailed summary of feedback will be submitted to the board.



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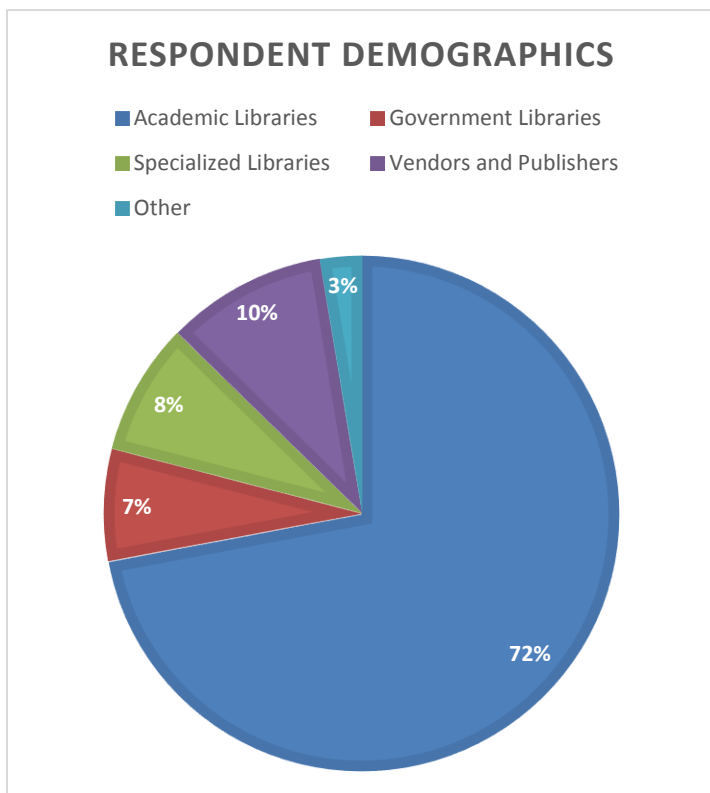
Events

The First Timer's/Mentoring Reception received a rating of 4.37. An overwhelming 93% would like to see this event continue. Comments submitted about the event were overwhelmingly positive, praising the mentors and networking opportunities.

The Business Meeting received a rating of 4.0; however, the comments were varied. Low attendance was noted.

The Vendor Expo received a rating of 3.68 with the majority of survey respondents (88%) wanting to see it continue. The majority of the negative feedback consisted of the space being too small for the event.

Respondent Demographics¹



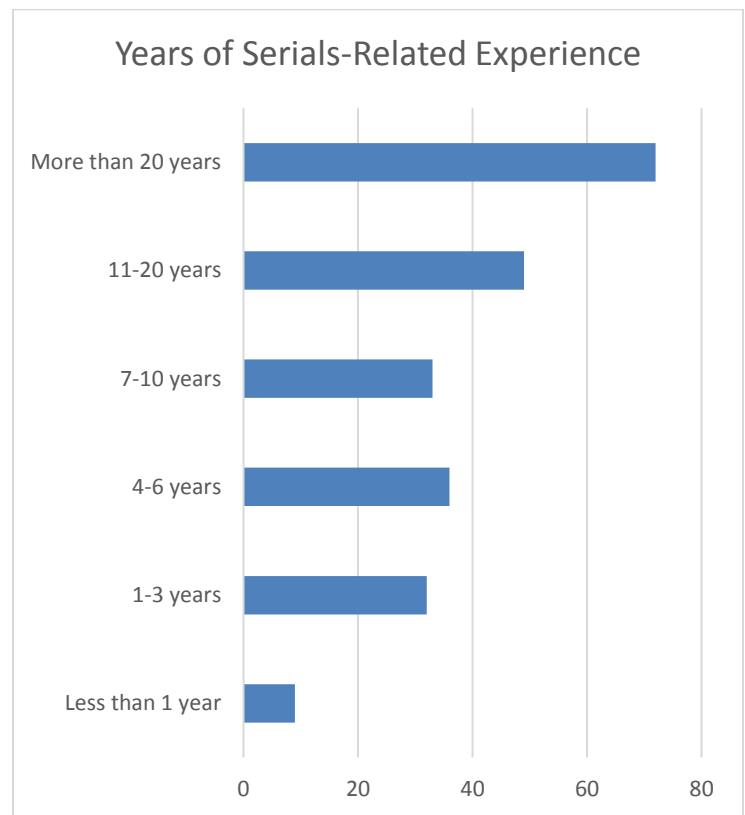
As in previous surveys, academic library employees continue to represent the largest group of respondents at 72%. This is a marginally higher percentage than was held by academic libraries for the 2014 conference at 75%.

1 -To ease the reading of the demographic chart, several categories offered on the survey were condensed:

- Academic libraries contains: College Library, Community College Library, University Library
- Vendors and Publishers contains: Automated Systems Vendor, Binder, Book Vendor, Database Provider, Publisher, Subscription Vendor or Agency

Respondents were asked to “describe your work” using as many of the twenty-four given choices as necessary (including “Other”). 2015 marks the second year that “electronic resources librarian” garnered the highest number of responses (113). Serials Librarian (96), Acquisitions Librarian (79), Catalog/Metadata Librarian (63), and Collection Development Librarian (51) rounded out the top five responses.

When asked about the number of years of serials related experience, “More than 20 years” received the majority at 72 responses.

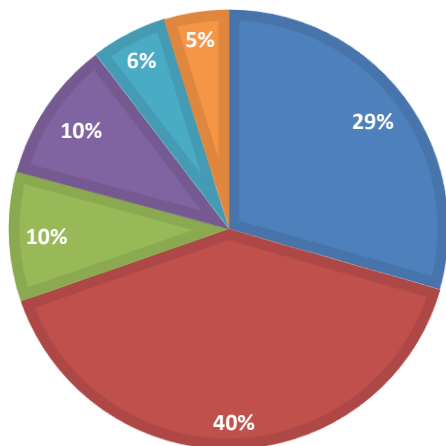


Forty percent of respondents noted they have attended one to five past conferences.

- 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.

PAST CONFERENCES ATTENDED

■ 0 ■ 1-5 ■ 6-10 ■ 11-15 ■ 16-20 ■ More than 20



Report on the 2015 NASIG Award Winners

At the 2015 NASIG annual conference, the Awards and Recognitions Committee presented the following awards: the John Riddick Student Grant, the Fritz Schwartz Serial Award, the NASIG grant for Mexican students, the Serials Specialist Award, the Rose Robischon Scholarship, and the Horizon Award. Each award included a financial component offsetting award winners' expenses to the conference. At the close of the conference each award winner was asked to comment on their experience. Questions were asked in the form of a survey, a compilation of their responses is included below.

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

- It really will give you a well-rounded and general understanding of the field. The breakout sessions are diverse that you can take a sampling of so many different topics. A newcomer would surely walk away knowing a little bit more about the hot button topics in serials. It's also a wonderful opportunity to get to know your peers who are just bursting to answer your questions and share their professional wisdom with you.

- Yes! A conference is always a good way to jump into a field, refine one's "pitch," learn to talk with other professionals, etc.
- The experience in a NASIG conference broadens our perspective, opens the possibility for dialogue and makes us able to compare the different methods on building a serial collection.
- Unlike the larger conferences with a broader scope, the narrower focus on serials keeps the conference small enough to allow better opportunities to get to know others working in serials.
- The main reason is the face to face interaction (networking). They are able to gain insight and knowledge from others with experience in the field.
- Newcomers can gain valuable practical knowledge from the seasoned and innovative speakers. Professional relationships with fellow attendees can also be a great way to learn about the field.

How did attending the conference benefit you personally?

- I have added to my knowledge bank! The conference definitely reinforced the things that I am learning in library school, and even added some new concepts as well! It's one thing to hear about open access mandates and e-resource management in class. It's another thing to hear it coming from librarians, vendors, and publishers at an internationally recognized conference.
- For me, NASIG was a learning experience I did not expect. I thought that I would be in a very pro-open access environment, but I found myself among librarians and professionals with much more nuanced views. In many cases, I met colleagues whose professions depended on various aspects of the scholarly publishing "status quo." This exposed me to people and perspectives I would not have sought out otherwise, and made me a better open access advocate for it.
- The conference helped me to understand different points of view on the subject, to see serial collections in a new perspective.

- I gained a better sense of the current scholarship in serials, I met others tackling some of the same issues I have been examining, and I reconnected with colleagues from previous positions.
- Attending the sessions gave me a better understanding on how to deal with certain aspects of my job. Also, during the socials I met some great people who were willing to share tips. I enjoyed meeting the students, they had many questions and I was happy to share what I knew.
- It was wonderful to spend time with such a friendly and relaxed group, and I felt very comfortable during the conference. I found that many of the conference session topics were very relevant to my position, and I will definitely be applying lessons learned to aspects of my own job.

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

- Most definitely. I am seriously considering a library career in acquisitions and e-resources.
- If anything, attending the conference confirmed my career plans in aiming for a career in open access and digital rights advocacy.
- It had a big impact on my resume, and makes me able to get a job on serials and to study the subject further.
- Rather than changing my career plans, seeing a continued need for the organization and interpretation of data reaffirmed my concentration on the technical side of serials management
- My career plans were reconfirmed. I am interested in upper management. Attending NASIG gave me an idea of what skills I need to develop.
- My career plans did not change by attending the conference.

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

- I would have really liked to attend one or two of the post-conference workshops, but I couldn't work it in

my budget. That would have been a nice addition to the award to be able to attend those without charge.

- My experience was overwhelmingly positive. The application was not confusing, questions about the application/process were answered quickly, decision and disbursement details were communicated comprehensively, and Tim was extremely helpful with travel arrangements. Thank you all!
- This was the first time someone from my university got the award. It was because they didn't get notifications earlier, and the students are not well informed on the awards.
- The timeframe for submission and announcement seemed less concrete than it could have been.
- Rose Robischon Scholarship – any scholarship that offers financial assistance is great. After reviewing the scholarships NASIG offers, none of them mention a mentor. It would be great if the recipients are assigned an experienced NASIG member to serve as a mentor. I think this will be a great asset especially for students.
- Nothing. Every aspect of my experience was a positive one. The various committee members who contacted me regarding the fact that I had won, the registration process, travel plans, & follow-ups communicated swiftly, clearly, and professionally.

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

- I would have liked planned, quick social activities in between sessions. I found myself not really knowing anyone, and the waiting in between sessions was kind of long.
- It would have been good to know more in advance about expectations of award winners, especially what events we should we absolutely be at (e.g. the opening dinner). It would also be cool to have some way to communicate with other award winners before/after the conference, especially (for me, at

least!) with fellow students and early-career professionals.

- I'd have liked to meet more people from the NASIG group, and to see a more diverse group, especially age-related.
- Everything was planned nicely, and I cannot think of anything I would have wanted changed. I felt very welcomed even as a paraprofessional among mostly professionals, and the mentoring program and first-timers reception certainly helped, as well.
- I had a great experience. I didn't know the awards winners would be recognized at the opening reception. I would include this information so winners know in advance.
- My experience during the conference was positive and I felt very welcomed. Communications regarding the awards dinner, the first-timer & mentoring cocktail hour and the committee meeting breakfast were clear and any questions that I posed were answered in a timely manner.

Do you have any other suggestions or comments?

Please tell us about them here.

- The conference was truly a great experience. Thank you for the opportunity.
- Not that I can think of right now, but I will be in touch if I do!
- No, it was great overall.
- I enjoyed listening to the speaker at the awards dinner, and I thought it was refreshing to have that slight break from serials scholarship to hear about local DC history.
- A group photo of the winners – set a no conflict time if possible.
- Can't thank the Awards & Recognition Committee enough, as well as NASIG as a whole, for providing me with this wonderful and enlightening experience. NASIG is obviously a very special group and it has been an honor to meet and learn from the speakers and other attendees. My only

suggestion is a selfish one – keep the conference in the Northeast!!

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

- I received an e-mail on the University of Missouri School of Information Science and Learning Technology listserv.
- Department (UW iSchool MLIS) listserv
- My university got an invitation through AMBAC, the Mexican association on library science. I was working on the program coordination when it came through, so I posted in Facebook and applied.
- The announcement was emailed to all staff in my department by my department head.
- I learned about the awards via NASIG listserv and did more research on the website
- I learned about the awards on the NASIG Website. I was browsing the NASIG Conference Archives to get a sense of what this conference is all about, and followed the 'sponsors' link.

Where should NASIG be promoting awards?

- Everywhere! Lol, just kidding. To library schools was the way I learned. I think that scholarship seekers will look first to their school, so that would be the best and most appropriate place.
- It sounds like NASIG is already promoting to schools/departments. Connecting with student associations (ALISS, etc.) might also ensure that students hear about it and pay attention when they do.
- NASIG website, library listservs, MLS/MLIS programs, other conferences
- Promote awards on the conference registration's website. This serves as a reminder to members that awards are available.
- Large national/International listservs, small local listservs, library schools, social media.

Conference Reports

Post-Conferences

[Name and Title Authorities for Serial Catalogers](#)

Vision Sessions

[Ain't Nobody's Business If I Do \(Read Serials\)](#)

Conference Sessions

[Expanding the Boundaries of the E-resource Life Cycle](#)

[Extending the Use of Collections](#)

[How to Manage, Develop, & Think about Content in your Discovery Tool](#)

[A Comparative Analysis of E-Books](#)

[E-Book Collection Development Policies](#)

[Stories of Successful E-Resources Management](#)

[A Road from Turnaway Data to Repurposed Space](#)

[30 Years of Collection Development Trends](#)

[Introduction to USUS](#)

[Using Available Tools to Support E-Resources Lifecycle](#)

[Re-Envisioning E-Resources Holdings Management](#)

[Representing Serials Metadata in Institutional Repositories](#)

[Moving from a Physical to a Virtual Journal Collection](#)

[Strategies for Expanding E-Journal Preservation](#)

[Thirty Years of NASIG](#)

[Troubleshooting Electronic Resources with ILL Data](#)

[Why Using a Subscription Agent Makes Good Sense](#)

[A Case Study of a Library Consortium Migration](#)

First, the workshop introduced the principles and benefits of authority records. The presenters then described the three underlying RDA principles that must be followed with NAR creation:

- Differentiation (how entities must be distinguishable from other entities);
- Representation (how preferred name or title must be based on its most commonly known form);
- Relationships (where associations should be made between entities).

By following these principles library users and librarians can benefit from their NARs, which support catalogs in collocating these entities and create precision in searching for serials.

Nguyen proceeded with a discussion about the foundation of RDA name authorities. RDA is a set of cataloging guidelines that indicate how to record data and define attributes in entities. While RDA is a set of instructions, the Functional Requirement for Bibliographic Records (FRBR) is a conceptual model of the bibliographic universe. FRBR is based on an entity-relationship model used in databases. In this model there are three concepts:

- Entities (elements that exist in the bibliographic universe);
- Relationships (associations between two or more entities);
- Attributes (the characteristics that identify the entities or their relationships).

Hawkins continued the workshop with instructions on how to formulate an authorized access point (AAP) for works and expressions. The AAP is the authoritative form of writing titles and names in bibliographic records. With titles, catalogers must answer the following questions: Is the work created by one person? Is it a collaborative work or a compilation of works? Each scenario requires the cataloger to formulate the authority differently. If the creator does exist, either personal or corporate, the AAP must include the author first, and then the preferred title.

Post-Conferences

Introduction to Name and Title Authorities for Serial Catalogers, Part 1 & 2

Les Hawkins, Library of Congress

Hien Nguyen, Library of Congress

Reported by Heylicken "Hayley" Moreno

Hawkins and Nguyen's workshop gave an overview on name authority records (NARs) in Resource Description and Access (RDA). The type of NARs that were discussed in the post-conference focused on those that are commonly found in serials. These NARs include works, expressions, corporate bodies, conferences, and personal names.

On the other hand, an AAP for expression must always begin with the work and continue with the translated language or edition. Works and expressions can also have relationships. In RDA, relationship designators have been created to explicitly state the type of association one authority has with another.

Then, Nguyen elaborated on the selection process for choosing the AAP of corporate bodies. This type of entity requires a cataloger to distinguish the parent-subordinate hierarchies that may exist. The preferred name must distinguish between a body and entities. If the preferred name does not suggest a corporate body, there must be an addition to the AAP that would allow users to identify it appropriately. Subsequently, Nguyen discussed conference NARs which are usually identified by the institution that organized the event. Elements that may be included in the AAP are the conference number, date, and location.

Finally, personal names were mentioned briefly. The AAP should be based on the most frequently used name in publications; the exception being a change in name, in which case the latest version of the name is then considered to be the preferred form.

The final portion of the workshop was dedicated to attributes, which allow for a richer description of authority records. For instance, works have form, place of origin, and history as attributes. In expression, there is a content type attribute which specifies the medium being used to communicate the subject. Corporate name attributes include types of bodies, jurisdiction, address, field of activity, and history. Personal names have title of the person, his/her profession, as well as field of activity as attributes. All NARs share date, language, and identifiers as attributes.

Hawkins concluded by stating that the most important concept to remember is that authorities should be created to help users find and distinguish entities. RDA offers catalogers more options to perform this important function and make resources more discoverable. The new cataloging guidelines allow description to be enhanced through attributes and

relationships which are showcased in today's NARs.

Vision Sessions

Ain't Nobody's Business If I Do (Read Serials)

Dorothea Salo, University of Wisconsin-Madison

Reported by: Esta Tovstiadi

Salo, from the iSchool at the University of Wisconsin-Madison, began her presentation by connecting issues in reader privacy to Billie Holliday's song, "Ain't Nobody's Business if I Do." She noted that while data collection about readers is useful because the data offers opportunities for revenue generation and improvements based on usability, it is also in violation of the 3rd article of the *ALA Code of Ethics*.

Then, Salo explained how the "Internet of things" has begun to permeate our lives. For example, many products that previously functioned independently from the Internet, such as thermostats, toys, and televisions can now be connected to it to provide enhanced capabilities. However, she warned, these tools offer "creepy" insight into individuals' behavior. For example, thermostat data could inform burglars whether or not a house is occupied, or could be used against individuals in rental or loan decisions. Salo also pointed out that now there are Barbie Dolls that record what a child says and sends it to Mattel which, in turn, can be used by the company.

Salo explained that this issue is important for NASIG, pointing to many past and current problems in e-resource reader privacy. She attempted to find privacy statements from various organizations in the information resource chain, and found that groups such as the Committee on Publication Ethics and the Society for Scholarly Publishing, as well as many others, lacked statements regarding reader privacy. Additionally, a 2012 content analysis of library vendor privacy policies found that while many vendors had policies, those policies were not equal to the *ALA Code of Ethics*. Finally, Salo described a study that found that sixteen

out of twenty major research journals allowed advertising networks to "spy on their users."

Pointing out the current NISO effort to construct a framework for supporting patron privacy in digital libraries, Salo called for NASIG to join in and support this initiative. She challenged librarians to consider the *ALA Code of Ethics* when using patron data to improve services, using the question, "Would we do this in a physical library?" as a litmus test for whether or not the use of data is ethical. Additionally, libraries need to consider user privacy when sharing data with companies such as Google, Facebook, and course management systems. Salo also encouraged libraries to respect patron privacy even when patrons are unaware or not concerned with it.

As a possible solution to these privacy concerns, Salo suggested that librarians understand these risks and try to mitigate them. Information that is personally identifiable or uncommon enough to lead to identification, as well as large pools of data about a user's breadth of use, is the most risky. Furthermore, while some data gatherers want to use data for harmless ventures, others are looking to profit from data they collect, at the expense of users' privacy. Salo proposed that libraries should engage in policy work, as well as work with content providers, to ensure reader privacy. Most importantly, she concluded, libraries should refuse to participate in data collection that violates the right to privacy outlined in the *ALA Code of Ethics*.

Conference Sessions

'And Other Duties as Assigned': Expanding the Boundaries of the E-resource Life Cycle to Get Things Done

Marcella Leshner, St. Mary's University
Stacy Fowler, St. Mary's University School of Law

Reported by: Erin Finnerty

Leshner began with a comparison of various occupational responsibilities to the structure of the e-resources lifecycle. She described how NASIG's Core Competencies for Electronic Resources Librarians (http://www.nasig.org/site_page.cfm?pk_association_webpage_menu=310&pk_association_webpage=1225) applies to each position and pointed out which standards have become the most important. She explained that both she and Fowler work in a hybrid environment, and the NASIG e-resources life cycle chart and the TERMS chart (Techniques for E-Resource Management) created by Jill Emery and Graham Stone are integral to their success.

Leshner then outlined the size and scope of the St. Mary's University collection, and then provided her job description. It included many diverse areas of responsibility, including acquisitions, serials, liaison work, supervisory roles, and vendor communications.

Leshner described one project that involved weeding bound journals and children's literature to create space for a new café and open learning commons area. The discussion and planning phase ran from 2008-2010 and the project began in 2011. The library opted for further JSTOR participation instead of expensive compact shelving to house older journals. The café and learning commons opened in September 2012. Leshner related how elements of this project fit in with the e-resources lifecycle by citing various investigation, review, and implementation procedures.

Leshner described a second project that involved collaborating with Special Collections on the collection

of old school newspapers dating back to 1924. These items were in fragile condition and there was no money for digitization. Leshner was able to secure a grant through the Rescuing Texas History program at the University of North Texas. She realized elements of this project reflected the e-resource life cycle since there was a need to review licensing terms from other offices on campus, and she had to obtain authorization to apply for the grant.

Fowler began her presentation by providing her job description. Her various responsibilities included acquisitions, serials management, automated library system support, supervising staff, website maintenance, faculty research requests, interlibrary loan, and technical services.

The project she described involved rearranging 42,000 books on the first floor of the library. They needed to reorganize the space for better flow and organization, and to create additional study space. An unexpected push in the scheduling of the project resulted in rushed decision-making about the collections. Fowler explained that in this case, the e-resource life cycle helped to determine what could be safely discarded.

Beyond the Research Paper: Extending the Use of Collections

Kristen Garlock, JSTOR
Eric Johnson, Folger Shakespeare Library

Reported by: Melody Dale

Garlock began with a brief overview of Classroom Readings (<http://labs.jstor.org/readings/>), a tool developed by JSTOR to enable teachers to find articles frequently used in the classroom. This tool was developed based on usage data and is free up until the point of opening the article. The original concept for Classroom Readings was to help participants gain more use from the collections in JSTOR. Initially the plan was to create a list of JSTOR sources based around curricula for core college-level courses (based on syllabi), but several discoveries influenced a decision to develop a

different approach. An analysis of usage patterns from 2011-2013 identified a “teaching use,” by employing an algorithm showing short use surges of a particular resource during a two-week period at a single institution. The study identified over 9,000 articles with “teaching use” patterns. Other findings indicated substantial use in humanities and thematic patterns across institutions, despite a lack of overlap in particular articles assigned.

After creating a basic search index and applying topic modeling to articles, JSTOR decided to use a flash build to quickly develop the Classroom Readings prototype. This involved five days of intensive testing with ten teachers from various levels. Teacher participation enabled JSTOR to identify high-value features for particular types of institutions, such as reading level indicators for high school teachers. Additionally, this helped differentiate content needs for varying education levels; for example, secondary schools placed a higher emphasis on relatedness while higher education institutions placed a higher value on authoritativeness. The success of the flash build led JSTOR to perform several more since the initial study, and improvements are still being made to this tool. JSTOR is considering several ways in which to improve the dataset, such as the possibility of allowing educators to contribute to the content.

Eric Johnson of Folger Shakespeare Library (FSL) transitioned into a brief history of his institution and discussed several other avenues of readership, the first of which was Folger Digital Texts. Folger Digital Texts (<http://www.folgerdigitaltexts.org>) was formed by a partnership between FSL and Simon & Schuster, and offers the complete works of William Shakespeare for free, non-commercial use. These digital editions are taken from the Folger Shakespeare Library editions but lack the additional content provided by the print versions, such as notes and summaries. Johnson also discussed *Shakespeare Quarterly*, a peer-reviewed journal published by Johns Hopkins University Press for FSL. This journal’s article views were significant, with the most frequently viewed article averaging around 140 views per month since publication.

One interesting tool mentioned was developed by a partnership between Folger Shakespeare Library and JSTOR. This tool, referred to as Understanding Shakespeare (<http://labs.jstor.org/shakespeare/>), connects the digital texts from FSL with related articles on JSTOR. Readers can view each Shakespeare play line by line and see corresponding JSTOR articles. Early data collection suggests *Hamlet* is the most heavily researched Shakespeare play, based on usage in this particular tool. This was unsurprising given that *Hamlet* is also the most frequently purchased of all Folger Shakespeare Library Editions and has the highest number of publications about it by a large margin. Johnson closed on a humorous note, showing a bar graph comparing the bar revenue as a percentage of ticket revenue in different genres; histories had the highest percentage of bar revenue, followed by tragedies, then comedies.

But is My Resource Included? How to Manage, Develop, and Think about the Content in Your Discovery Tool

Monica Moore, University of Notre Dame

Reported by: Marcella Leshar

Monica Moore, an electronic resources librarian at the University of Notre Dame (Notre Dame), presented on content representation in Notre Dame's discovery tool, Primo Central, and how users at her institution engage with the content made available through that tool. She questioned if the pursuit of total resource inclusion in discovery tools is more important than the newsworthiness of the discovered record. She noted that a search in a discovery service will not necessarily retrieve the same set of records as a search in a source database. She also wondered how one would be able to tell if the records of the source database are totally included and how frequently its contents are updated. She felt that it is better for the institution to concentrate on managing "newsworthy" records rather than trying to include everything in the discovery system.

Notre Dame has certain criteria for deciding on when to activate content in their discovery tool, including analyzing content relevancy, content delivery, checking to see if the resource can be found through basic metadata, and looking for overlap so that only unique metadata is used in the search algorithms. In their usage studies, Notre Dame has used [Google Analytics Event Tracking](#) methodology. The resource collections in Primo Central are tracked as record sources to find out which resources the users are actually being guided to in their discovery searches. She has discovered that 58% of the "search events" were coming from local catalog records.

Her research has also found that a small number of collections drive most of the usage. Ten of their activated resource collections (out of approximately 150) get the most usage. She showed data which measured finding and then acquiring full text versus discovery or exploration. "I want it events," where users accessed the full text accounted for 62% of the analyzed data. "I'm interested events," where the user looked at the details, the titles, or the citation accounted for 34%. "I want something like it events," where users took advantage of linking to related topics only accounted for 3.6% of the events. She also noted that items that had been coded as reference were actually being treated differently than primary literature. She hypothesized that students were not actually going to the full text of resources such as *Encyclopedia Britannica* and were using the abstract as the reference source instead.

This research as well as other data points discussed in her presentation provided the information needed to better and more efficiently curate the contents of their discovery system. Not all of a library's holdings need to be "turned on" in the discovery system. Moore indicated the need to provide maximum coverage for known-item searches, that pointer resources such as LibGuides should be discoverable in searches, and that known databases such as MLA or Web of Science should also be discoverable as separate records.

Comparing Digital Apples and Oranges: A Comparative Analysis of E-Books across Multiple Platforms

Esta Tovstiadi, University of Colorado Boulder
Gabrielle Wiersma, University of Colorado Boulder

Reported by: Erin Finnerty

Wiersma began by outlining e-book purchase considerations from both the collection development and end-user perspectives. Some of these factors included digital file format, print versus e-book availability, pricing, platform functionality, and e-book formatting. She also explained the main differences between the most common e-book formats (.xml, .epub, .pdf), and the impact of digital conversion methods, quality of metadata, and search algorithms.

The methodology for Tovstiadi and Wiersma's study involved using a random sample of approximately one hundred English language e-books published in 2014 from academic publishers. All were available on both the native publisher platform as well as three aggregator sites. In total, they evaluated about twenty different platforms, including: EBSCO, Brill, ABC-CLIO, Credo, Springer, Wiley, Taylor & Francis, IGI, Gale, and MyiLibrary. The College and Research Libraries (CRL) Academic Database Assessment Tool provided a basis for their e-book platform evaluation rubric (<http://adat.crl.edu/ebooks>).

Wiersma explained that they used Google Sheets to collect the data, and found the side-by-side comparison format helpful. Points of comparison across the different platforms included, but were not limited to: bibliographic information, permanent linking, pagination, table of contents, download options, printing options, social media integration, citation tools, and page navigation. She emphasized that accurate pagination seemed to be a specifically problematic element across the e-book platforms. The e-book pagination on a given platform did not always match the original pagination of the published text, and page breaks were often in the wrong place. Incorrect

pagination can cause problems for searching and citing resources.

Tovstiadi then continued discussing their findings, and specifically focused on search functionality and search results. Most platforms allow searches across the platform and searches within a book, and some platforms also allow searching within results. Tovstiadi noted that the digital conversion process can affect the ability to keyword search.

Tovstiadi and Wiersma made some recommendations based on their findings. They suggested that platforms that provide e-books in .epub format seem to have less errors, and that aggregators and publishers should provide both .pdf and .epub versions of e-books (like EBSCO). Their next step is to do a larger scale test, discuss the results with e-book vendors and publishers, and perform usability testing with students and faculty. They believe that it is necessary to continue educating users about correct citing practices, and to further investigate the accuracy of optical character recognition (OCR) and other digital conversion techniques. Tovstiadi and Wiersma felt that their rubric can be used again, and is suitable for providing good feedback to vendors and publishers.

E-Book Collection Development: Formalizing a Policy for Smaller Libraries

Ria Lukes, Indiana University Kokomo
Angie Thorpe, Indiana University Kokomo
Susanne Markgren, SUNY Purchase College

Reported by: Stephanie Spratt

Ria Lukes and Angie Thorpe of Indiana University Kokomo (IUK) Library presented on their experience adapting an existing collection development policy for demand-driven acquisitions (DDA) of e-books. While the IUK Library has a collection development policy that is reviewed annually, the policy was not considered when e-books were introduced into the collection. Initially, they selected e-book collections based on attractive big deal e-book packages; however, they felt the need to

expand their collection development policy to e-books due to an increase in digital education at IU; fiscally beneficial acquisition models; the volume of off-campus students; and faculty requests for e-book purchases. Despite these reasons that would encourage the use of e-books, interactions at the reference desk indicated that many students still preferred to use print books.

In order to draft a collection development policy for e-books, the Library started by asking colleagues for examples of their existing policies, but soon discovered that many libraries lacked formal policies. The presenters discussed format duplication issues as well as ownership versus DDA. The decision was made to move forward with a librarian-mediated DDA program as it appeared IUK would get “more bang for [its] buck.” The DDA program in place now is fully mediated (both at the discovery and purchase levels) by librarians and is subject to review based on fifty-eight selection criteria publically available at <http://iuk.libguides.com/nasig>. The presenters are moving forward with the next steps of tackling workflow issues such as the possibility of altering the organizational structure of the Libraries’ Technical Services Department, MARC record maintenance, and e-book weeding.

The third speaker, Markgren of SUNY’s Purchase College Library, discussed her library’s project of using a DDA e-book provider, ebrary, as an alternative to keeping their more than five thousand title reference collection. An interesting decision in the implementation was to wait to put e-book records into the catalog until after a purchase was triggered, which would occur after two short-term loans on the title. It is Markgren’s hope that this limitation on access points can be reduced by the appearance of the e-book discovery records in the EBSCO Discovery Services system in use at SUNY Purchase, but the process of getting the e-book records to display has not been simple.

Questions from the audience included marketing strategy and tracking turnaway reports to determine the need to increase e-book titles to more than one simultaneous user. The speakers all indicated that they also rely on library instruction sessions for users to find

e-books. The speakers from IUK indicated that they do review turnaway reports, but are more likely to buy a print complement to the e-book in lieu of increasing the simultaneous users allowed for particular titles.

The Future is Flexible, Extensible, and Community-Based: Stories of Successful Electronic Resources Management

Steve Oberg, Wheaton College

Andrea Imre, Southern Illinois University Carbondale

Scott Vieira, Rice University

Reported by: Tessa Minchew

Prior to accepting his position with Rice University, Vieira was with Sam Houston State University, a public institution in Huntsville, Texas. Upon starting at Sam Houston, Vieira received the charge of populating their existing ERM product, though he had no prior experience with electronic resources management. He soon discovered that his task would be made even more challenging by a lack of existing documentation and the need to do a fair bit of research to even gather the data needed to populate the ERM. He also discovered that some of the library’s resources had not even been activated or made discoverable for patrons.

Oberg currently works at Wheaton College, a liberal arts institution in Illinois. The library staff was interested in streamlining the maintenance their Databases A-Z list, which is the most heavily used portion of their website. During this process they decided to expand the definition of what would be included on the Databases A-Z list to encompass a number of things that really weren’t databases at all. He found that database metadata was being managed in as many as six different systems, resulting in unavoidable inconsistency. In addition, database metadata was being manually entered into Wheaton’s website CMS (Drupal), a process that was becoming less and less sustainable with the continuing addition of new databases.

At another institution in Illinois, at the public Southern Illinois University Carbondale, Imre and her colleagues were looking for ways to manage the workflow associated with a 5.6-million-dollar budget; 90% of which was devoted to e-resources, with only four library staff members managing this format.

In all three cases, these libraries turned to CORAL (<http://coral-erm.org>) to address their e-resources management needs, and they were all very pleased with the results. CORAL (Centralized Online Resources Acquisitions and Licensing) is a free, flexible, open-source ERM originally built at the University of Notre Dame's Hesburgh Libraries. Current development and technical support are managed by a multi-library steering committee that is welcoming of new members.

Over the course of their session, Vieira, Oberg, and Imre each walked the audience through how they used CORAL to address their various electronic resources management concerns, including efficiently populating and maintaining an ever-expanding A-Z list, delegating and tracking different steps of a complex workflow across several different staff members, and usage statistics tracking and reporting. All presenters were satisfied with CORAL's performance in managing non-linear workflows, reducing duplication of effort, and otherwise streamlining electronic resource management activities. They highly recommended it to others seeking a cost-effective and flexible electronic resources management tool.

Get 'Em In, Get 'Em Out: Finding a Road from Turnaway Data to Repurposed Space

Nikki DeMoville, California Polytechnic State University

Reported by: Marsha Seamans

DeMoville described a project to recover linear shelf space while expanding online access and improving discovery to targeted content. The project was in response to a 5-10 year master space plan, along with \$125,000 funding for collection development, which needed to be spent within six months.

The goals for the project were established working within a short timeline and a small staff of five. The first goal was to get the "biggest bang for the buck" by spending the allocated funds before the deadline to acquire content with a proven need, and that allowed for the removal of print materials. The second goal was to improve access by identifying what users were trying to access online. The third goal was directed at reducing the impact of withdrawing print. This was accomplished by checking digital preservation in the Western Regional Storage Trust (WEST) which is a print storage repository; arranging for recycling of print to minimize environmental impact; and supporting interlibrary loan through back file purchases. The fourth goal was to increase discovery by aligning indexes between the catalog and the ERM. Finally, the fifth goal was to practice evidence-informed decision making to identify, justify, and evaluate access.

In order to develop an identification tool, a lot of data was combined from a variety of sources, including vendor title lists, Serials Solutions, Innovative's online catalog, Thomson Reuter, and West. ScienceDirect was chosen for the initial evaluation because of its high usage, significant front file holdings, easily identified turnaways, strong correlation with print holdings, and clean, easily available usage and holdings reports. A template was developed with many formulas to minimize copy and paste.

The decision criteria used to determine the purchase of electronic back files included: turnaways, back file depth, existing front file subscriptions, match with print holdings, and price of packages. Twenty-four packages were evaluated for possible purchase, with eleven selected, plus two individual titles. The decision criteria used to determine withdrawal of print volumes included: print circulation statistics, dustiness, and preservation in trusted repositories.

Utilizing Excel to combine data from COUNTER JR2 Access Denied reports, print and online holdings information, and print circulation data, six hundred linear feet of space was replaced by online back files. New coverage includes 4,568 years across 252 title

families and resulted in more than 3,300 uses in the first year. The project was considered successful, as the library has had no complaints regarding the withdrawn print volumes.

How We Used to Build the Future: 30 Years of Collection Development Trends

Betsy Appleton, St. Edward's University
Justin Clarke, Harrassowitz
Dani Roach, University of St. Thomas
Moderated by Laurie Kaplan, Proquest

Reported by: Nancy Hampton

In light of the thirtieth anniversary of NASIG and the shift from print to electronic serials collections, a panel of librarians took a historic look back at collection development trends and practices. The panel gave a historic overview of what library collections looked like in the late 1980s and how online evaluation tools of the early 2000s had an impact on libraries. They also discussed collection “best practices” today and where future collections will focus.

Using statistical data from *Ulrich's Periodicals Directory* and similar tools, the presenters considered how the changing landscape of serials publishing over the years has impacted the ways in which librarians evaluate, select, and assess their collections, from the days of print directories to today's e-resource management offerings.

Introduction

The moderator, Kaplan, introduced the session, explaining that Roach would present the first twenty years of collection development during NASIG's existence. Appleton would then present the last ten years of collection development from the perspective of the library. Clarke would present the last thirty years of collection development from the point of view of the vendor.

Kaplan described the evolution of UlrichsWeb over the past 30 years in order to set the scene for the panel. In

1932, the chief of the Periodicals Division of the New York Public Library published the *Periodicals Directory: A Classified Guide to a Selected List of Current Periodicals Foreign and Domestic*. It was innovative for its time because it gave an overall serials title list for librarians. The directory is still being published today, however, it is much more expensive than its initial price of ten dollars.

The *Ulrich's Plus* CD-ROM became available to libraries in the 1980s. In the 1990s the online third party links for *Ulrich's* became available. In the 2000s Ulrich's Serials Analysis Systems was released, and in 2010 Ulrich's redesigned its website, UlrichsWeb, based on input from librarians and other clients.

The relationship between Ulrich's and the Library of Congress ISSN Center has changed since the early days (pre-1990s) when Ulrich was able to directly access ISSN numbers from the Library of Congress and the ISSN Portal. During the 1990s, the Library of Congress and Ulrich worked with Bowker to assign ISSN numbers. Today the Library of Congress works with ProQuest MARC to issue ISSN numbers.

Statistically, Ulrich has tracked different things over the years from referred titles to electronic titles. The new phase of UlrichsWeb is INTOTA Assessment which focuses on the lifecycle of library resources.

First 20 Years of NASIG (1985-2004)

Roach discussed the early years of NASIG. In 1985, the collections of most NASIG librarians consisted of print books, print journals, VHS tapes, laser discs, LPs, micro formats (microfilm and microfiche), and indexes and abstracts. Many transitory formats were still being used at that time, such as 8-track cassette tapes. The library's multiple formats required multiple pieces of equipment.

Micro opaque cards were widely used and considered to be great space savers during the 1980s. VHS tapes were relatively new to most librarians, and libraries were being built or renovated with the idea that library shelving would need to expand over time in order to

accommodate growing bound periodical collections. Librarians at early NASIG conferences compared binding company prices and efficiency.

In the 1990s, librarians initially began to shift to the use of CD-ROMs before Dialog and e-resources became widely available. Changes since then include dense websites that host e-resources and a move owning collections to managing access to collections.

In 1985, collections were assessed by counting the number of items owned. Librarians kept track of the number of volumes they had acquired. The amount of money spent on a collection was used as a way to assess the value of the collection. Circulation statistics were used to measure the usefulness of titles. The number of times a print journal was reshelved was counted in order to measure its usefulness.

The tools used for assessment have also changed. In 1985, librarians used date stamps and library cards to measure how many times a title had circulated. In addition, punch cards were used for tracking circulation statistics. By 2004 COUNTER reports and network statistics were being used to assess library collections. We could also measure e-book usage by this time.

Vendor promotion of library materials also changed over the years. From 1985 until the early 1990s, print catalogues and visits from vendors were used promote library materials. By 2004, email was a standard way to send advertisements, catalogues, and vendor information. Library vendors regularly asked librarians to visit their websites for product information.

Last 10 Years of NASIG (2005-2015)

Appleton examined the changes that have occurred in libraries this past decade. In 2005 The St. Edward's University Scarborough-Phillips Library website had no distinguishable search box. Google was available during the 2003-2004 academic year and no one knew the impact it would have on libraries. A decade later, libraries use the search box model promoted by Google

and the St. Edward's University Library's website is no exception.

Libraries currently measure the usage of materials using all of the tools they used ten years ago (what we license, COUNTER statistics, network statistics) as well as open access sources, website analytics, altmetrics, and user experience/user behaviors.

What we own has changed this past decade. Open access has become a viable publishing model. COUNTER is far more than the general report 1, as it now considers how users use our websites.

The tools libraries use now have also changed. In 2004 libraries used tools such as link resolvers, electronic resource management systems (ERMS), A-Z lists, federated searches, integrated library systems, record sets, and model licenses. Until 2008, no one knew how to use their ERMS, and federated searches were not as ubiquitous as they once were. Libraries began to use library service platforms, discovery services, knowledgebases, and Shared Electronic Resource Understanding (SERU). These tools are still used, but now they are hosted in the cloud. Librarians also needed to manage these tools. In 2005, the management of electronic resources was thought to be something librarians could do in their spare time; this has now become a full-time occupation.

In 2005, the idea that print would become obsolete was still being considered but at this time print is thought to be permanent and not something that will go away entirely. There are new roles in libraries as librarians promote open access publishing in libraries and experimenting with new forms of advocacy and outreach.

Collection Development: A Vendor Perspective

Clarke began working fifteen years ago at Temple University's Library before becoming a vendor. Over the past five years, he has observed that librarians are requesting more than just a journal title and an ISSN, but rather they also need the eISSN. It is anticipated

that electronic journal titles will increase as publishers are creating fewer print runs. More often librarians are asking whether or not the title they need is available electronically, and if so, what the subscription covers. There are many issues associated with subscribing to electronic resources, such as back file availability, platform hosting, IP-authenticated resources versus the dreaded username/password option, IP ranges, post-cancellation access rights, licensing information, FTE, Carnegie classification, and license agreements. Another layer of complexity includes multiple institutional sites, proxy server information, consortial participation, license cycles, and individual contract details. All of these concerns are shaping the way librarians make collection development decisions.

Individual contact details may be tedious but they are used so that vendors can send information specifically to those who need it. Tools such as online catalogues rather than print catalogues are intended to help expedite ordering, renewing, claiming, sharing financial data, and cancelling. The renewal process is moving away from paper renewal. Claiming is just as important as ever. Librarians are also asking about price projections. In addition, librarians should ask about automation EDI standards, because vendors should participate and be aware of these standards, and request management reports from vendors, to assist with analysis. These issues are becoming prevalent with e-books as well.

Question/Answer

There was general consensus among the presenters and the audience that federated searching never delivered all that it initially promised. The idea was good but it was so slow it never panned out. There was also agreement among audience members who worked during the 1980s that time was wasted binding print issues, preparing issues for the bindery, and then tracking bound periodicals. Yet, they never imagined that all of that work would have become unimportant with the emergence of e-journals. Roach emphasized that preservation and binding was crucial during the 1980s and 1990s. Appleton commented that her first

library job was to discard bound periodicals found in JSTOR.

Several audience members expressed concern about the redundancy and multiplication of the tools for measuring usage. They agreed that libraries may be over measuring at this point and using tools with shortcomings. The publishers' perspective is that having a consolidated system to track things makes it easier as data can be pulled out, used, and analyzed faster and easier.

The audience reflected on the implication of resource sharing and how it has become faster yet more complex. In half a decade, students have gone from waiting three days for an article, to gaining access to it instantly. Publishers, however, are not embracing the concept of resource sharing in the electronic age. Clarke suggested that librarians need to advocate for continued resource sharing and affordable access.

Introduction to USUS, a Community Website on Library Usage, and a Discussion about COUNTER 4

Anne Osterman, Oliver Pesch, and Kari Schmidt, USUS Supervisory Board Members

Reported by: Adele Fitzgerald

Schmidt kicked off the presentation by explaining what the USUS organization is and what it does. USUS ("usus" is Latin for usage) was founded in 2014, and is a community-run organization that provides a formal virtual space for discussing usage reports and disseminating information to the community about updates to relevant standards. The USUS website serves librarians, library consortium administrators, publishers, aggregators, repository managers, and individual scholars. While USUS is community-run, it also receives support from COUNTER.

Schmidt gave the audience a tour of the website, which offered a clear overview of USUS functionality (<http://www.usus.org.uk/>) (see Figure 1). She also pointed out that there is a new feature for an RSS feed

(<http://www.usus.org.uk/feed/>) to push out information on updates.



Figure 1. “USUS Homepage”

The “Hints & Tips” page lists known issues, standards information, and new updates. Visitors can troubleshoot their own issues by reading about known problems posted here (see Figure 2).

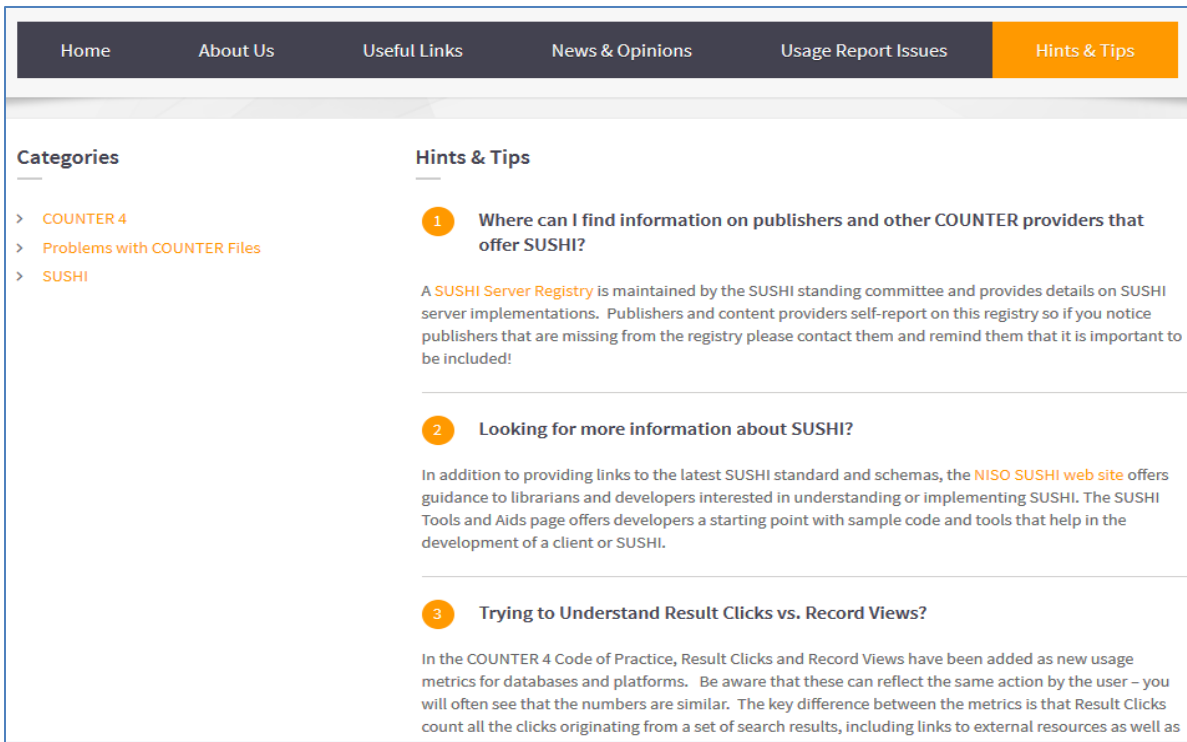


Figure 2. "Hints & Tips"

The "News & Opinions" page offers news and trends, training, publications, and publisher and vendor communities (see Figure 3).

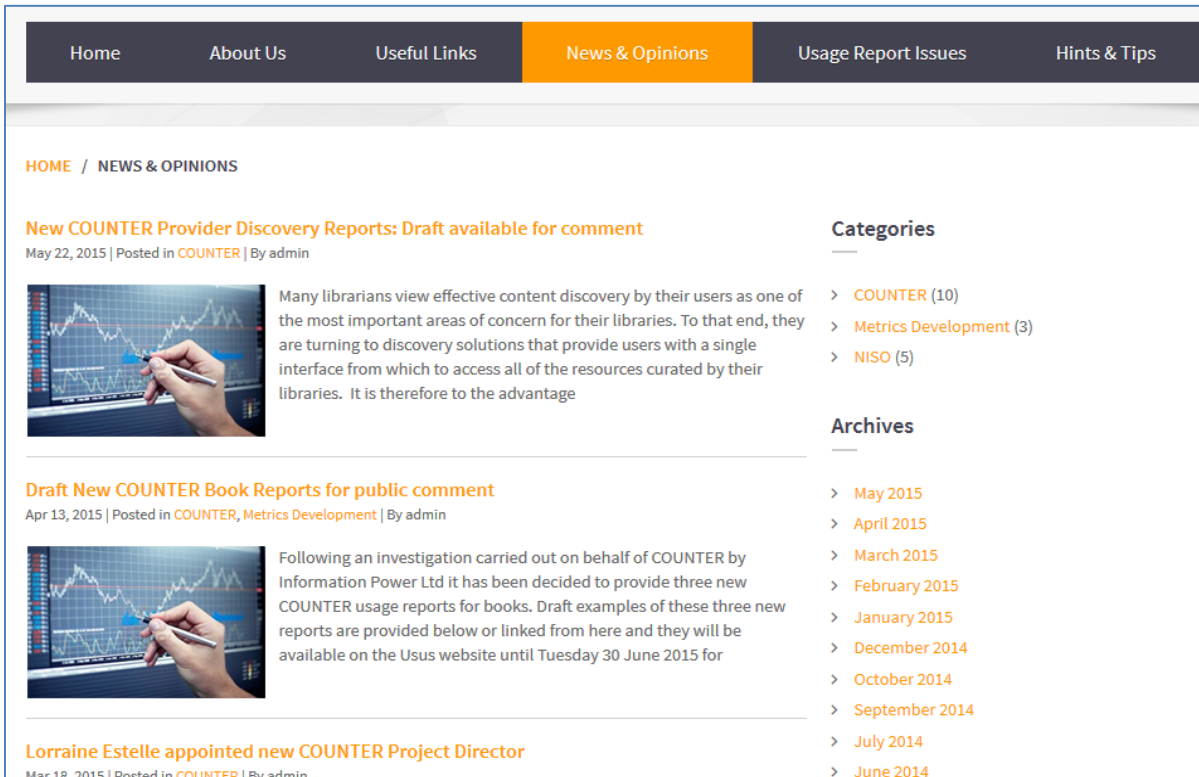
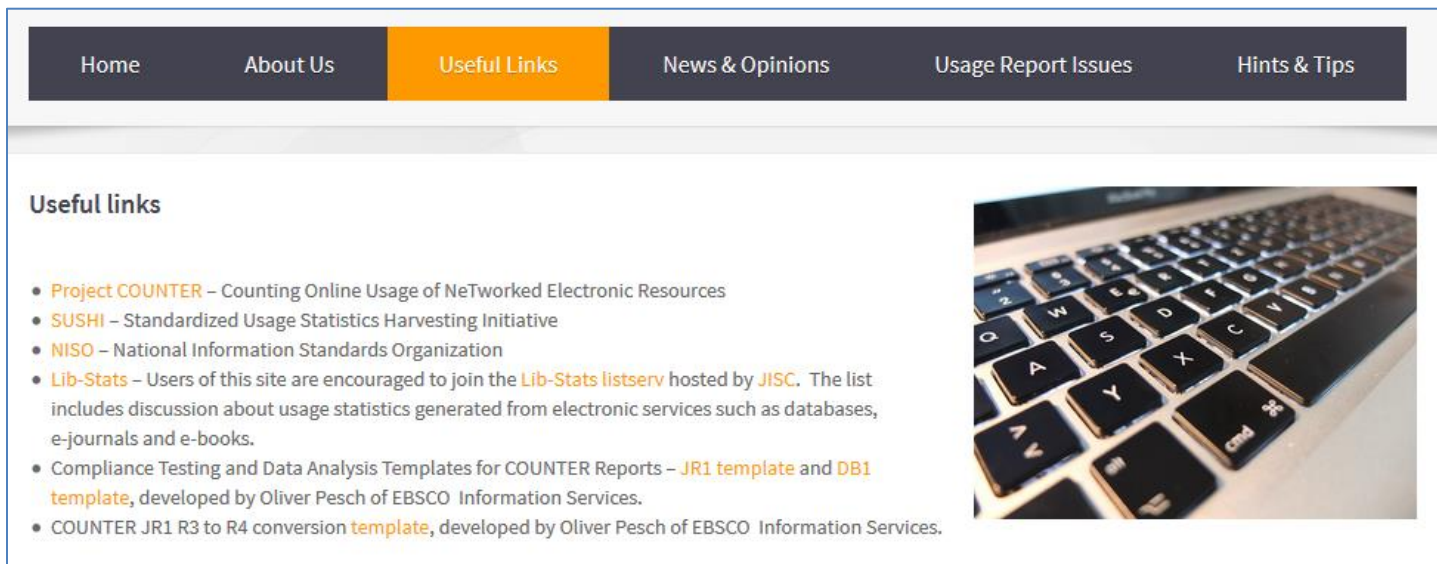


Figure 3. "News & Opinions"

The “Useful Links” page provides links to relevant external resources such as SUSHI, COUNTER, and NISO, as well as links to the Lib-Stats listserv, tools, and templates (see Figure 4).



Home About Us **Useful Links** News & Opinions Usage Report Issues Hints & Tips

Useful links

- **Project COUNTER** – Counting Online Usage of NeTworked Electronic Resources
- **SUSHI** – Standardized Usage Statistics Harvesting Initiative
- **NISO** – National Information Standards Organization
- **Lib-Stats** – Users of this site are encouraged to join the **Lib-Stats listserv** hosted by **JISC**. The list includes discussion about usage statistics generated from electronic services such as databases, e-journals and e-books.
- Compliance Testing and Data Analysis Templates for COUNTER Reports – **JR1 template** and **DB1 template**, developed by Oliver Pesch of EBSCO Information Services.
- COUNTER JR1 R3 to R4 conversion **template**, developed by Oliver Pesch of EBSCO Information Services.




Figure 4. “Useful Links”

The “Usage Report Issues” page is by far the most active page on the website (see Figure 5). Issue reports are posted here. (To report an issue, one should click on the enveloped-shaped icon labeled “*get in touch*” found on the top right of the webpage (see Figure 1). This will present the user with a “Contact Us” form). The troubleshooting process is initiated after the form is

submitted. USUS reviews the submission and determines if it is a local or community-wide issue. If necessary, they will work with vendors and publishers to resolve. They will respond to the issue by posting the problem and resolution on the website, pushing the details out on the listserv, and replying to the originator to close the loop.

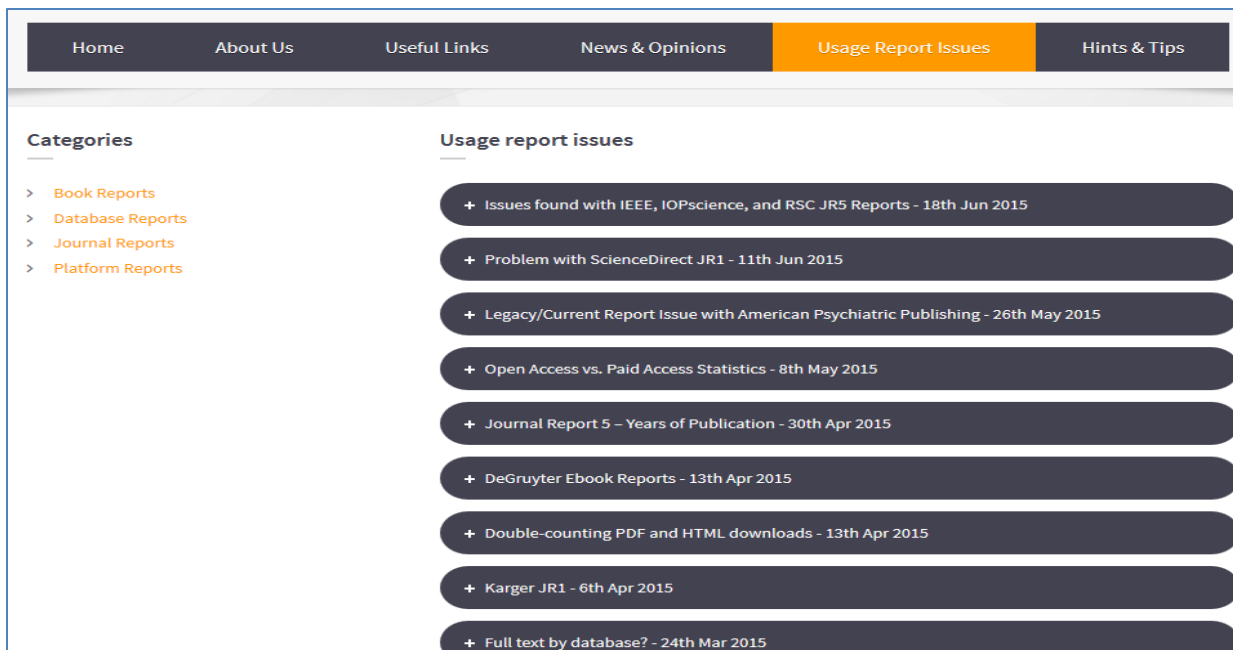


Figure 5. “Usage Report Issues”

The second presenter, Pesch, described in detail some of the tools and templates that are available on the “Useful Links” page. He explained that errors sometime occur when trying to load data into a system. The tools and templates that are available on the website provide the user with a means to flush out errors from the data. Pesch strongly encouraged the audience members to report any errors they encounter during data collection to assist USUS in identifying and solving problems.

Pesch discussed two of the tools that he has developed and made available on the “Useful Links” page. The first tool is the Compliance Testing and Data Analysis Templates for COUNTER Reports. This tool runs twenty-three validation tests to identify compliance issues, and flags any errors and warnings. The second tool is the COUNTER JR1 R3 to R4 Conversion Template. As its name implies, this tool converts JR1 release 3 reports to JR1 release 4 reports.

The third presenter, Osterman, led a discussion on COUNTER 4. She explained that COUNTER 4 is a living standard, and summarized several of the changes from COUNTER 3 to COUNTER 4. Changes included:

- In DB Report 1:
 - Sessions were dropped

- Record views and result clicks were added
- DB Report 3 was renamed Platform Report 1
- In Book Report 2, vendors must now define type of section
- Inclusion of Journal and book report identifiers
- Inclusion of DOIs for books and journals
- Ability to include proprietary ID for journals
- Multimedia reports added (e.g. audio, video, images)
- Addition of the optional Journal Report 3 Mobile, which tracks journal usage by mobile device
- Addition of Journal Report 1 GOA (gold open access), which tracks usage of gold open access (not green open access)

Pesch returned to discuss the work being done on the SUSHI-Lite protocol. There is a working group preparing to release a NISO Technical Report which will explore the adaptation of the SUSHI standard to accommodate present day development tools and usage needs related to retrieving snippets of usage via HTTP-based services. This report is currently in the reviewing phase, and is almost ready for public viewing. Finally, the presenters concluded with a lively question and answer dialogue with the audience.

The Path of Least Resistance: Using Available Tools to Support the E-Resources Lifecycle

*Tessa Minchew, North Carolina State University
Sofia Slutszkaya, Georgia Perimeter College*

Reported by: Janet Arcand

Tessa Minchew (North Carolina State University) and Sofia Slutszkaya (Georgia Perimeter College) joined forces to present a description of how their differing institutions were able to use open source or low-cost products to help their libraries support aspects of the complex electronic resource lifecycle. North Carolina State University (NCSU) encompasses three physical campuses and the electronic resource management work is done by five librarians and seventeen staff members, who manage 470 databases, 8,100 electronic journal subscriptions and over 800,000 e-books. In addition, NCSU has access to more electronic resources through membership in NC Live. Georgia Perimeter College (GPC) is a community college with five physical campuses. The electronic resource work is performed by one librarian who manages the acquisition of twenty-three databases and over 100,000 e-books. GPC has more electronic access through participation in GALILEO, a consortium. Even though their colleges have different missions and collections, both Minchew and Slutszkaya use the same products to help manage electronic resource collections.

NCSU uses Microsoft Access (MS Access) for administration, cancellation, and package management, and it formed the basis for a journal cancellation project database in 2014-2015. They also used MS Access to create a package change database to record ordering, licensing, set-up, maintenance, title change, and renewal information which had formerly been in Excel. Seven staff members were assigned work within these databases. GPC uses ERMes for e-resource acquisitions, administration, and management purposes, which is a freely available MS Access database, and is ideal for a small organization. It does not require server space for hosting, and works well for managing journal packages. One drawback to ERMes is that it lacks an alert system.

At NCSU, Confluence Wiki is used as an electronic resource hub to contain information formerly spread over many wikis, paper files, and drives. It took between three to four months to set-up, and enables staff to track or link to all information related to electronic resource purchasing and management. At GPC Confluence Wiki provides the front-end of a library e-resource selection guide. Specifically, staff can see the past history of trials and renewals, and can obtain harvested usage statistics.

Trello is a cloud-based management software used by GPC for the back end of their selection guide. The structure of boards, lists, cards, and data is used to manage renewals, cancellations, and new database orders. It also supports alerts and flexibly-organized checklists. Trello is used at NCSU for acquisition, administration, and package management. Minchew gave a live demonstration of Trello, displaying the package management board and the license team board, which contains templates useful for creating new records. NCSU uses Trello's free version, finding its structure and framework flexible enough to handle the needed complexity.

Re-Envisioning E-Resources Holdings Management

Marlene van Ballegoie, University of Toronto Libraries

Reported by: Susan Wishnetsky

Marlene van Ballegoie began the presentation with the observation that e-resources have descended upon libraries "like an avalanche" since the time of the founding of NASIG in 1986. E-resources have necessitated major changes in the way librarians manage collections. Van Ballegoie observed that during the early days of experimentations, predictions about the future of libraries varied wildly. Some dismissed electronic publishing as a fad that would never take off and were "wildly off-the-mark;" others were more prescient and envisioned an efficient future in which librarians would no longer create catalog records for their own libraries, but instead, would

manage and organize widely-shared metadata produced by publishers or other agents.

Today, with the huge collections acquired in "Big Deal" packages, the notion of title-by-title cataloging by each individual library is nearly unthinkable. The era of shared, outsourced cataloging has indeed arrived, but the dream of automated efficiency has yet to be realized. Publishers send files of entire collections to knowledgebase providers, but librarians still find themselves repeatedly selecting their subscribed titles, entering or correcting edition information, dates of coverage, concurrent user, and license data. New titles or packages may be slow to appear in knowledgebases, necessitating repeated follow-ups by librarians to ensure access and accuracy. Publisher or platform changes, title changes, and cessations may not appear promptly. Sometimes subscribed titles are completely missing from all the collections in a knowledgebase.

OCLC and Proquest began collaborating in late 2013 to alleviate these problems by automating the process of entering library-specific holdings into the WorldCat knowledgebase. The experiment began with two of the largest e-book aggregators, Proquest's E-book Library (EBL) and ebrary; later, other content providers including MyiLibrary, JSTOR, Stat!Ref, and Elsevier's ScienceDirect began automatically loading holdings information. Participating publishers must submit four types of KBART-formatted, standardized spreadsheet files to OCLC: the "collections file" with metadata for titles in each package, a "collections description file" with package-level metadata, a "customer map" which identifies customers by OCLC ID numbers, and a "holdings data file" which identifies the subscribed content, access restrictions and other library-specific information of each customer. Automatic delivery of MARC records from OCLC can be enabled, and if patron-driven acquisition (PDA) is an option for a particular vendor, titles available on that basis can also be identified in the spreadsheets.

As the metadata librarian at the University of Toronto Libraries, van Ballegooie wanted to find out about this new and potentially valuable service. Beginning in

September 2014, van Ballegooie signed up for all the available content providers' automated holdings feeds, which at that time consisted of ebrary, MyiLibrary, EBL, and ScienceDirect. Each time a feed was loaded into OCLC, she obtained a report of the feed from OCLC and the content provider's site; the data was adjusted for purposes of comparison between the content providers and then loaded into a MySQL database.

The results were promising, but far from perfect. All four content providers promised either weekly or bi-weekly loads into OCLC, but none actually achieved that frequency. All claimed that at least 95% of their book titles (and 91% of ScienceDirect journals) were in OCLC, and indeed the match rate to OCLC records was generally quite good (and improved over the course of the study), but in some cases, large numbers of the library's subscribed titles were simply left out of the feed. In one case the missing titles had still not appeared in any subsequent feed even nine months later. ScienceDirect was a particular problem because of its multiple publication types and collections. Elsevier considered its customers to be "subscribed" to its free and complimentary content, so the feed reports provided by Elsevier included non-subscribed titles along with the subscribed titles, which presented an immediate problem. There was also a problem with duplication of titles classified as more than one publication type, or which appeared in multiple collections. The classifications of publication types were changed mid-study, which may have simplified the reports, but complicated van Ballegooie's data entry. But once those difficulties were resolved, it was apparent that Elsevier performed better than the other content providers in terms of the frequency of their loads and the percentage of her library's holdings correctly loaded into WorldCat.

Overall, the feeds provided to OCLC seemed to be a big improvement over the data contained in most traditional electronic resource management systems, where the titles in subscribed packages often do not match the titles in any package in the ERM, and changes to titles and packages tend to appear long after the fact, if ever. Van Ballegooie reported that this service is

Representing Serials Metadata in Institutional Repositories

Lisa Gonzalez, Catholic Theological Union

Reported by: Melody Dale

"particularly well-suited for those cherry-picked collections" for which manual selection would otherwise be necessary. She noted that the service is available to any library with a subscription to OCLC cataloging and does not require an additional fee. A big drawback of automated feeds is that errors must be corrected "at the top of the chain," with the content provider; manual editing of holdings data is not necessary, since it is merely overwritten by subsequent feeds. A simple way to report and correct errors is needed to ensure accuracy of the data.

Surprisingly, libraries receive no notification when a new feed has been loaded into OCLC, and must periodically check to see if any new activity has occurred; a notification feature, it seems, could easily be added. In addition, the upload reports from OCLC contain no titles or standard numbers, but only "OCLC entry ID" numbers, which must be looked up to identify the titles. Van Ballegoie pointed out that another fairly simple piece of data excluded from the system is concurrent-user limits, which is important information for faculty, and for managing user expectations. Van Ballegoie further noted that nightly updates, as opposed to weekly or biweekly loads would be beneficial. Among van Ballegoie's highest priorities for automated e-resource holdings management is single-journal subscriptions, which are among the most difficult and time-consuming to manage.

Generally, van Ballegoie would like more content providers to participate in this service. Since the service currently has only 6.5% of the e-resource holdings at the University of Toronto, van Ballegoie hopes that it will quickly expand. She encouraged libraries to convince their content providers to join this service.

In this session, Lisa Gonzalez gave practical information on making metadata decisions for the implementation of an institutional repository (IR). Gonzalez relayed her experience in examining article-level metadata in a sample of IR platforms and displayed samples of metadata from the different IRs. The data gathered was used to assist the Catholic Theological Union in selecting a platform, choosing a metadata schema, and creating policies for the institutional repository that is currently in the pilot stage.

The library at Catholic Theological Union (CTU) currently publishes an open access journal through Open Journal Systems (OJS) and has been an active proponent of open access (OA) for several years. Because of CTU's strong commitment to OA, a decision was made to implement an institutional repository for electronic theses and dissertations. Gonzalez had recently read about "invisible IRs" which are institutional repositories with low discoverability in Google Scholar due to inadequate indexing. This phenomenon led her to research methods of indexing to develop a more useful tagging strategy. Google Scholar guidelines promoted the use of HighWire Press tags, EPrints tags, bepress tags, and PRISM tags, as opposed to Dublin Core tags because they do not index as effectively for articles.

Initial research by Gonzalez involved gathering data from OpenDOAR, the Directory of Open Access Repositories. One chart from OpenDOAR detailing metadata reuse policies indicated that 85.8% fell into ambiguous categories such as undefined, unknown, unstated, or other. This problem indicates a need for IRs to offer more explicit information about metadata reuse. Other data from OpenDOAR indicated journal articles as the most frequently used content type in IRs. DSpace was the chosen platform for over 40% of the IRs

listed in OpenDOAR, with the remainder using EPrints, Digital Commons, or others.

Gonzalez explored the platforms and characteristics of several IRs, including University of Michigan (DSpace), University of Queensland (Fedora), Columbia University (Fedora), eLIS (EPrints), University of Nebraska Lincoln (Digital Commons), Bielefeld University (LibreCat), and UPEI (Islandora). After comparing different platforms, CTU chose CONTENTdm and began working on local adaptations for their data dictionary. Additionally, CTU began developing good practices which were largely based on the *UIC Data Dictionary for CONTENTdm* and *Best Practices for CONTENTdm and Other OAI-PMH Compliant Repositories*. The Dublin Core Generator (<http://www.dublincoregenerator.com/generator.html>) was also discussed as a useful tool for practicing the application of Dublin Core Metadata.

In developing an institutional use case, CTU compared Zotero's functionality across several IRs. Several issues were noted, one of which included Zotero's tendency to identify articles as webpages when embedded metadata was used, and issues with retrieving metadata for PDFs, which is highly dependent on Google Scholar. Gonzalez noted the importance of using embedded metadata in PDFs to enable discoverability across the IR platform as well as Google Scholar. Gonzalez closed the session by encouraging other librarians to start with use cases developed for particular institutional needs, to use OpenDOAR policy guidelines to evaluate institutional policies, and to share metadata and documentation with others.

Space Case: Moving from a Physical to a Virtual Journal Collection

Rhonda Glazier, University of Colorado, Colorado Springs
Stephanie Spratt, University of Colorado, Colorado Springs

Reported by: Mary Bailey

Glazier and Spratt began their session with the reasons why their library moved from a primarily physical to a primarily virtual journal collection. Glazier noted that their current statistics show over 70,000 journals are now online with over 15,000 open access journals. At their library, online is considered the preferred format for scholarly articles, and consequently, print has much lower use. In addition, budget cuts resulted in the cancellation of many print journals. In addition, during the past few years, the University of Colorado, Colorado Spring (UC-CS) campus has had 5% student population growth, and a student survey in 2013 confirmed more collaborative study space was needed.

Thus, the campus library's priorities have shifted from shelving print journals to creating collaborative spaces. Since there were no options available for offsite storage, a weeding project was planned. Glazier was the lead on a project that reviewed titles available in JSTOR for possible weeding. For the project, print usage was reviewed, the collection was evaluated, and data was gathered and then analyzed. Exceptions to weeding were permitted with the Dean's approval.

Spratt shared how Excel helped in working with the data. She provided step-by-step instructions on how she took the list provided by JSTOR and compared it with her print holdings list to find duplications and remove titles that did not need to be reviewed. She used Excel functions to remove "The" from titles, matching titles and ISSNs, and compared the holdings from the two lists. Her detailed instructions provided ways to eliminate hours of spreadsheet work.

The latter part of the presentation detailed campus collaboration, including working with the Sustainability Office, to remove withdrawn items from the library, updating the catalog for both print and online access, and then what the library did to create new space for students.

Lessons learned included: knowing your catalog records won't be perfect and understanding that a lot of database work (holdings and purchase order records) must be done; determining how to calculate collection statistics before you start the project; verifying the counts are correct before removing items; remembering to determine a new base count when you finish; making campus faculty and students aware of the project by creating an effective communication channel before you start the project.

Strategies for Expanding E-Journal Preservation

Shannon Regan, Columbia University

Reported by: Laura Secord

Inspired by a 2012 Keepers Registry study of e-journals that concluded that only 22-27% of the e-journal holdings of Columbia, Cornell, and Duke Universities were preserved by preservation agencies, Columbia and Cornell Universities (2CUL) launched a project to evaluate strategies for increasing e-journal preservation.² Funded by the Mellon Foundation, the project had the following three major goals:

- Identify what is not preserved;
- Identify why it is not preserved;
- Evaluate strategies for expanding e-journal preservation.

Regan, the e-journal preservation librarian from Columbia University Libraries, began the presentation with an overview of the major serials preservation

agencies, including Portico, LOCKSS, and CLOCKSS. She also noted the important roles of The Keepers Registry and the HathiTrust. She noted the difference between perpetual access (access to content from the years that a library had a subscription) and preservation or archival access (which guarantees that content is available for a library to exercise its perpetual access rights).

The study by 2CUL determined that Portico and LOCKSS combined preserved just 26.1% of Cornell's e-journal titles with an ISSN, EISSN, or both. The content that is often not preserved by preservation agencies includes aggregated content, titles without ISSNs or EISSNs, titles published by academic institutions, open access journals, and foreign language titles. The study concluded that a number of factors affect preservation, including time, money, lack of understanding of the purpose and methods of preservation, and questions about who has the right to preserve the content.

Regan shared a number of strategies for expanding e-journal preservation and encouraged session attendees to take action by:

- Integrating preservation into license negotiation
- Participating in preservation initiatives through funding and outreach
- Evaluating preservation policies of current and new publishers
- Identifying at-risk titles and re-negotiating licenses
- Stressing the importance of preservation when working with subscription agents and publishers
- Discussing preservation with publishers, vendors, consortia members, faculty, and institutional repository managers.

² Burnhill, P. 2013. "Tales from the Keepers Registry: Serial Issues about Archiving & the Web." *Serials Review*. 39 (1): 3-20.

Thirty Years of NASIG: A Retrospective Look at Conference Programs, Publications, Workshops, and Webinars

Angela Dresselhaus, University of Montana, Missoula

Reported by: Scott McFadden

Angela Dresselhaus began with the first NASIG Conference that took place in 1986. After a reminder of the historical and cultural background of that year, including the presidency of Ronald Reagan and the explosion of the space shuttle *Challenger*, Dresselhaus noted some of the topics included in that first conference. Presentation topics included automation, the future of serials, journal pricing, OPACs, and the need for standards. In these early days, membership in NASIG was marketed to the serials community largely by word of mouth.

Closer examination of specific presentations revealed a focus on standards as a crucial element of serials automation. It was also noted that the sociological issues related to the implementation of new technology were important topics at this time in NASIG's history.

The tenth annual NASIG Conference took place in 1995, during the presidency of Bill Clinton, and the time of early Internet services such as America Online and Prodigy. This year also saw the advent of the DVD format. Topics discussed at the tenth conference included Electronic Data Interchange (EDI), Gopher sites, and Internet security. Several specific presentations were also examined, and one idea which emerged was the notion of how publishers add value to the scholarly process. It was at this time in NASIG's history that the idea began to emerge that presentations and individual members should endeavor not to denigrate publishers.

The twentieth annual NASIG Conference was held in 2005. Significant cultural events that year included the presidency of George W. Bush, the founding of YouTube, and the death of Pope John Paul II. Topics

discussed at this conference included professional development, article linking, metadata, FRBR, license negotiation, and open access journals. Examination of specific presentations noted the changes brought about by new technologies such as blogs, and the lack of interest in privacy among many bloggers. Other presentations revealed that the third generation cataloging code, AACR3, would not be forthcoming, having given way to a new code that would become RDA.

Finally, the most recent NASIG conferences were the twenty-ninth and thirtieth, held in 2014 and 2015. The presidency of Barack Obama, the Ebola outbreak, and increasing support for same-sex marriage are important cultural issues at this time. Topics presented at these conferences included RDA, HathiTrust, the "Big Deal," and pre-paid access. Presentations dealt with "electronic only" collection development policies, mobile applications, core competencies, and ORCID identifiers. By this time, NASIG was able to hold a joint session with the Society for Scholarly Publishing. This and the increasing availability of webinars for instruction and information sharing indicated how far the organization has come since its beginnings. Dresselhaus noted certain trends that have recurred throughout the history of NASIG conferences, often appearing earlier than one might imagine. Various aspects of automation appear frequently, though specific terms may change from year to year. Likewise, many presentations began with the words "The Future of..." which indicated an ongoing interest in the evolving nature of the profession. Journal pricing and the related phenomenon of open access journals have also been topics of continued interest.

In conclusion, Dresselhaus found that NASIG and its sister organization, UKSG, are unique organizations that have promising futures to look forward to.

Troubleshooting Electronic Resources with ILL Data

Beth Ashmore, Samford University Library

Reported by: David Macaulay

Beth Ashmore's presentation described ways in which Samford University Library used information about canceled interlibrary loan (ILL) requests to help troubleshoot problems with OpenURL linking to the library's electronic resources. After Samford implemented a new link resolver and knowledgebase system a few years ago, it was found that problems were occurring with greater frequency than usual, though users were submitting relatively few specific reports that would allow the library to identify and fix them. Many users who were unable to access a resource online would proceed to submit an ILL request. If the requested resource was determined to be available to library users, the request would be canceled, and the user notified with an email containing the correct citation for the item and instructions on how to ask for help in accessing it. Such situations can indicate systemic failures, such as errors in OpenURL linking. ILL began to copy Samford's Electronic Resources Department on emails that were sent to users when their requests were canceled so these requests could be examined.

Personnel in the Electronic Resources Department would test various ways to access the citations in these emails, using the three most common pathways employed by users: the library catalog, the library's discovery layer, and Google Scholar. Additionally, at the end of the school year, all data in the ILLiad system about relevant canceled requests were analyzed with the aim of identifying significant patterns.

Three main types of problem with OpenURL linking were identified:

1. The data used to make the link were incomplete or inaccurate.

2. The bibliographic metadata used by the link resolver and the library's holdings data were not synchronized.
3. Metadata were in incorrect formats.

An example of the first problem was a case where elements of date information were omitted when a citation was passed from the database to the link resolver. The link resolver filled in the missing element before accessing the target, but the added information was incorrect, leading to a failed link. Another example involved correct metadata being searched incorrectly in the target resource: information about an article in a journal that was enumerated only at the issue level was correctly passed via the link resolver, but the target database interpreted the issue number as a volume number when searching for the article. Problems of this type can be addressed individually as they are reported, but may still occur in the future depending on the vagaries of the metadata involved. Ashmore colorfully regarded this as "landmines" that will continue to exist. For particularly troublesome databases, a potential compromise solution is to turn off article-level linking, and link only to the journal title.

The second type of problem, resulting from the lack of synchronization between bibliographic metadata and the library's holdings data, was exemplified by issues experienced with Google Scholar – a popular resource for faculty and students, which can be configured to display links to a library's holdings next to search results. Sometimes, it was discovered, these links are not displayed in the expected place, but are rather hidden under the "More" link below the citation, where they would be if the item was not found to be in the library's collection. This issue, which occurred intermittently even with items that had been listed in the library's knowledgebase for a long time, can only be resolved by a better synchronization of Google's service with library holdings metadata.

The last example showed a problem with metadata harvested by the library's discovery service from an open access database. While all the necessary information appeared to be present in the discovery

service record, the elements were mislabeled so that, for example, the article title was also passed as the source title. Using this mismatched information, the link resolver was unable to find the article. This kind of issue could be resolved if more consistent data formats, such as KBART, were employed by resource providers.

The presentation finished up with an overview of the workflow that was developed for Samford's Electronic Resources staff to access the ILLiad system on a daily basis, permitting examination of more extensive information about canceled ILL requests than was provided in the emails from ILL to patrons. This allowed them to see the source of the citation involved when a problem was encountered, making it easier to troubleshoot the issue. In the case of particularly persistent problems, the user could be contacted directly with more information, and occasionally a copy of the desired item, while the issue was being addressed.

Beyond enabling identification and resolution of issues with the link resolver, Samford's analysis of data from canceled ILL requests has brought benefits in other areas:

- Instruction and outreach: efforts can be targeted to demographic groups that are found to be consistently making ILL requests for locally available materials.
- Collaboration between departments: with the Electronic Resources Department receiving valuable data and providing ILL with links to include in emails to users when requests are canceled.
- Interface design: by suggesting the potential for enhancements to the link resolver window.
- Promotes thinking about ways to provide information about "random" open access materials and print holdings in the link resolver.
- Training of staff in troubleshooting electronic resources.

Questions included an inquiry about users' response to the assistance they were provided in accessing material. Ashmore estimated that while 75% of users contacted

remained silent, the other 25% responded very positively, confirming for her that the process represented a good way of establishing positive relationships with users.

Why Using a Subscription Agent Makes Good Sense

*Deborah England, Wright State University
Tina Feick, Harrassowitz
Kimberly Steinle, Duke University Press*

Reported by: Delphia Williams

The session began with a discussion of the benefits of using subscription agents for both libraries and publishers. Libraries can benefit from subscription agent services in the following ways: the ability to have one point of contact for many subscriptions; electronic ordering and invoicing; savings through discounts; and added services to improve workflows. Publishers also benefit from working with subscription agents as their intermediary in handling, as they serve as a communication channel for customers, and therefore, allow publishers to reduce staff costs.

Much of the session was devoted to the effects the Swets bankruptcy had on the community. Tina Feick, of Harrassowitz, outlined the warning signs apparent to the commercial community. Other subscription agents could not openly discuss Swets' slow demise due to maintaining professional confidentiality. There were warning signs as early as 2007 about problems, such as the buyout by a private equity firm, declining revenues, and high employee turnover. The bankruptcy resulted in many losses: 30 million Euros, many jobs, trust in the community, and a competitor from the market place. Also, agents and publishers received payment late due to subscribers divesting from working with Swets.

The panel gave several recommendations for keeping on top of subscription agents. It is important to conduct periodic performance reviews of subscription agents and vendors and set Google Alerts to be notified of any changes involving commercial business partners. They

also recommended learning to understand how publishers and agents work together to establish pricing models. For libraries that prepay their vendors they suggested bank guarantees to insure prepayment funds. Bank guarantees would cost libraries a little more money but if an agent were to go under money could be recovered. Networking with other institutions and maintaining strong relationships with agents is of utmost importance. Lastly, teaching financial management in library programs was highly recommended.

Wrangling Cats: A Case Study of a Library Consortium Migration

Steve Shadle, University of Washington

Reported by: Marsha Seamans

Shadle's presentation focused on the experience of the Orbis Cascade Alliance in migrating to ExLibris' Alma and Primo. The consortium is comprised of thirty-seven members representing both public and private schools in Oregon, Washington, and Idaho, serving 275,000 students and 280 staff. The Alliance is a nonprofit corporation of ten staff and has no direct funding. The University of Washington (UW) is the largest of the institutions, with University of Oregon being the second largest at about half the size UW. One of the issues of having a diverse membership is that the concerns of research universities and smaller institutions differ widely.

The Alliance has a shared collection, with direct patron borrowing, shared e-resource purchasing, a courier service, and some shared collection development. Prior to migration, collaborative technical services was minimal with the exception of sharing language expertise among technical services librarians.

The strategic agenda for migration was directed at reducing duplicate efforts, working smart for efficiency, designing for engagement and innovating to transform. The thirty-seven colleges, universities and community colleges were to migrate to ExLibris's Alma for their ILS

and Primo for discovery. The implementation would replace a multitude of ILS systems, discovery systems, ERM software, link resolvers, knowledgebases, standalone proxy servers, and local servers in favor of the cloud environment.

Implementation involved the following four big projects at once: moving legacy systems to a next generation system; combining thirty-seven institutions' data into one; implementing a shared discovery system; and planning for collaborative technical services. The ExLibris representative was responsible for overall project management, training and consulting support, creating the initial configuration, and data migration. The Alliance responsibilities included project management, configuration decisions, data extracts from non-ExLibris systems, review of configuration and data, and training support for later cohorts.

The project structure included seven working groups with 6-10 members each and an implementation team of eight members (heads of each working group and an Alliance member). Working groups were Discovery, Cataloging, Circulation and Resource Sharing, Training, Systems, Acquisitions, and Serials/ERM. There was a strong focus on training which was strategically critical to the project's success. The first cohort went live in July 2013, and the fourth and last cohort went live in January 2015.

Shadle wrapped up his presentation with lessons learned. Cohort-based migration is not ideal but was required due to system limitations and development. The burden for implementation fell on earlier cohorts and extra effort was required to support the longer transition. There were too many working groups; communication and coordination were difficult. In addition, burnout and turnover among participants occurred. It is important to be able to let go of old practices and to embrace change and ambiguity. Also, beginning data cleanup as soon as possible is critical. Collaboration results in good things such as a better shared understanding; a unified voice in working with ExLibris; an understanding that Alliance work is part of someone's job, not an extra assignment; and a

recognition that distributed work is possible. The final lesson learned is that consortial work can be difficult;

institutions were not as similar as they thought in terms of policies and systems.

Columns

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 kcbythe@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.]

Given that NASIG is the most happening professional organization in the history of the world, it should come as no surprise that we have some new members. Please welcome:

Rebecca Bearden. In her own words:

“What began as a student on-campus job during my undergraduate studies turned into my career choice. I’ve been working with serials for the past thirteen years. I was a student member of NASIG from 2006-2007 while obtaining my MLS, and I re-joined in May 2014. I will be attending my first NASIG conference this year and look forward to meeting everyone.”

Presently, Rebecca is the Technical Services Librarian at the University of Connecticut School of Law Library, having earned her MLS from Southern Connecticut State University.

Virginia Bryant relates:

There's no great story to how I came to join NASIG. I've long been interested in NASIG noting its' quality conference programming, and this year the NASIG conference happens to be local to Washington D.C. The longer version is that a colleague, the former serials librarian at George Washington Law, retired last year and her responsibilities were divided among a number of librarians and staff. Now, more than before, as assistant director for technical services my position provides oversight for the

handling of continuing resources within the library's ILS. I review the bibliographic records for print and electronic continuing resources, and load in the ILS all of the incoming electronic resources batch files. NASIG members have been integral in sharing practices regarding electronic resources so I look forward attending the conference programs in May.

Qali Farah is another person new to NASIG, one who “has been an Acquisitions/Serials staff member for a long time and [who] recently received my MLS degree from the University of Maryland.

Matt Harrington, serials package manager at North Carolina State University, is also new to NASIG, but has worked with serials as a paraprofessional for several years. Matt writes, “I am thankful to have been awarded the Serials Specialist award at the recent NASIG conference. It was a wonderful experience, and though the award brought me to NASIG as a first-timer, I look forward to next year's conference.”

Ria Lukes is the technical services librarian at Indiana University, Kokomo, a position she has held since 1998. Her responsibilities include collection development, acquisitions and acquisition budgeting, cataloging, collection maintenance, and coordinator of the Federal Depository Library Program. Ria has held three other professional positions in both academic and special libraries that gave her experience in reference, teaching, and management. Her research interests include collection development and shared print collections, assessment of the value of academic libraries, library websites, and government documents. She earned both her MLS and B.S. in Education from Indiana University. Ria recently joined NASIG as a way to find colleagues who share her professional interests and have like responsibilities. She also gave back to the organization by presenting at the 30th annual NASIG conference.

Eridan Thompson, who you may remember from "Citations," recently completed her first year as the electronic resources librarian at Florida Southern College. She joined NASIG with an eye towards learning more about the NAISG Core Competencies for Electronic Resources Librarians. Eridan is trying to learn as much as possible but has found that this area of librarianship has many different tracks and a huge learning curve.

Linda Van Keuren writes:

I am the associate director for resources and access management at the Dahlgren Memorial Library, Georgetown University Medical Center. I have worked in academic libraries over 20 years and over 3 years here at Dahlgren Memorial Library. As Health Sciences research focuses heavily on journal content, I joined NASIG to network with other librarians tasked with negotiating, licensing, purchasing, managing and providing access to serial content. It is critical for my library, as a 99% digital library, to follow best practices for digital library management and the educational opportunities provided by NASIG will help me and the rest of the Dahlgren resources and access team remain current in this area.

Citations: Required Reading by NASIG Members

Kurt Blythe, Column Editor

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

Beach season is nearly over, but your latest installment of beach reading has arrived!

Bob Boissy and **Nettie Lagace** are amongst the serials luminaries with chapters in *The Critical Component: Standards in the Information Exchange Environment*, <http://www.alastore.ala.org/detail.aspx?ID=11483>,

edited by Todd Carpenter, with an introduction by Cindy Hepfer.

Nancy Hampton wrote, "A Library of Design: Electronic Collections Inspire Modern Research Spaces" in *CODEX: the Journal of the Louisiana Chapter of ACRL 3*, no. 2 (2015): 68-79, <http://journal.acrlla.org/index.php/codex/article/view/107>

Abstract:

The Xavier University of Louisiana Library Resource Center was built in 1993. After Hurricane Katrina filled the library with 18 inches of water in 2005, its first floor was re-carpeted, its bookshelves refurbished and the reference room was returned to its original state. In 2013, the Xavier Library began acquiring electronic resources to replace the majority of its print reference and print journal collections. As more virtual resources were purchased, less shelving space was needed, inspiring Xavier librarians to seize this opportunity to create a more inviting library that students could use for research, gathering, and studying. This article describes how discarding items formally collected in print and currently collected electronically, gave new life to the research spaces at the Xavier University Library.

Our former fearless leader, **Steve Kelley**, just had an article called, "Serials: What's In a Name?" and it was published in *Technicalities 35*, no. 3 (May/June 2015).

Steven A. Knowlton has been on a tear, of late, publishing (just in the last couple of years, mind you):

Knowlton, Steven A., and Lauren N. Hackert. "Value Added: Book Covers Provide Additional Impetus for Academic Library Patrons to Check Out Books." *Library Resources and Technical Services*, in press.

Knowlton, Steven A. "A Two-Step Model for Assessing Relative Interest in E-books Compared to Print." *College and Research Libraries*, in press.

Knowlton, Steven A., Iulia Kristanciuk, and Matthew J. Jabaily. "Spilling Out of the Funnel: How Serials Cancellations Affect Interlibrary Loan Use and Patron Access to Materials." *Library Resources and Technical Services* 59, no. 1 (February 2015): 4-12.

Knowlton, Steven A. "Print, Electronic, or Both? How Libraries Choose a Format When Purchasing Books." *Tennessee Libraries* 64, no. 2 (September 2014).

Knowlton, Steven A., Adam C. Sales and Kevin W. Merriman. "A Comparison of Faculty and Bibliometric Valuation of Serials Subscriptions at an Academic Research Library." *Serials Review* 40, no. 1 (2014): 28-39.

Knowlton, Steven A. "Power and Change in the U.S. Cataloging Community: The Case of William E. Studwell's Campaign for a Subject Cataloging Code." *Library Resources and Technical Services* 58, no. 2 (2014): 111-26.

Then, **Char Simser** published with **Marcia G. Stockham**, and **Elizabeth Turtle**, "Libraries as Publishers: A Winning Combination" in *OCLC Systems & Services: International Digital Library Perspectives* 31, iss. 2 (2015): 69-75, <http://dx.doi.org/10.1108/OCLC-01-2014-0006>

And, with **Regina Beard**, Char presented a poster session at ACRL entitled, "Using the Library's Scholarly Communications' Initiatives to Facilitate Graduate Student Awareness and Use of Open Access Resources" in March 2015.

Finally, **Eridan Thompson**, Eridan presented in April 2015 a poster, entitled, "Triangulating Duet: A Discovery" at the 2015 Innovative Users Group in Minneapolis, MN.

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 kcbythe@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.]

We have some title changes this quarter! Therefore, please join me in giving the following a round of applause:

Angela Dresselhaus has joined me in North Carolina as the head of electronic & continuing resources acquisitions at East Carolina University in Greenville, North Carolina. Formerly, the acquisitions and electronic resources librarian at the University of Montana, Angela made her move effective June 16.

Another (North) Carolina compatriot, **Katy Ginanni**, relates that:

The Content Organization and Management (COM, formerly known as Technical Services) Department at Western Carolina's Hunter Library decided to juggle some duties around, and as a result, I am taking on the newly created position of acquisitions librarian. I'll be handling acquisitions for all formats, including serials again! We hope to hire a new collection development librarian later this year, after a new dean is in place.

A big round of applause goes to **Joan Lamborn**, who has retired from her position as associate dean of University Libraries at the University of Northern Colorado. She worked for 25 years in the Libraries, first as the acquisitions/serials librarian, then as head of Library Administrative Services, and finally as associate dean. She started her library career as a librarian at *Mathematical Reviews*, and then worked as the serials cataloguer at Mount Holyoke College Library. When she began as the acquisitions/serials librarian at the University of Northern Colorado after taking a break to be home with young children, she joined NASIG. Her membership in NASIG provided an opportunity to catch up on the changes that had taken place in the serials world, continue to learn, and to network with colleagues. She also enjoyed working with NASIG colleagues as a member of the Nominations & Elections Committee, member and then chair of the Awards &

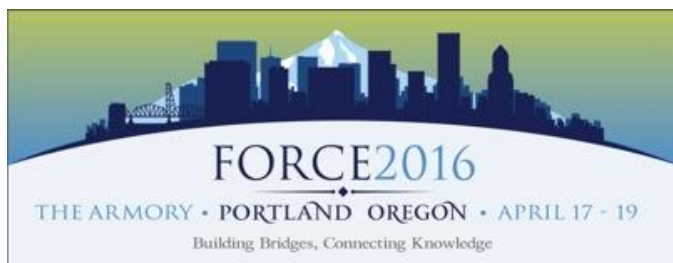
Recognition Committee, and as a member of the Planning Committee for the 2006 annual conference in Denver. She is looking forward to new adventures in the next phase of her life.

Lastly, but not in the least, leastly, **Danielle Williams** has moved from serving as the periodicals librarian to that of the collection development librarian at the University of Evansville.

Serials & E-Resources News

Upcoming FORCE2016 Conference: Building Bridges, Connecting Knowledge

The FORCE2016 Research Communication and e-Scholarship Conference brings together a diverse group of people interested in changing the way in which scholarly and scientific information is communicated and shared. The goal is to maximize efficiency and accessibility. The conference is non-traditional, with all stakeholders coming to the table for open discussion on an even playing field in support of innovation and coordination across perspectives. The conference is intended to create new partnerships and collaborations and support implementation of ideas generated at the conference and subsequent working groups.



Our first conference under the new name was held in Oxford last year in celebration of the 350th anniversary of the publication of the initial volume of the *Philosophical Transactions*--the first scientific journal. At

the Oxford conference, we focused on reproducibility, data sharing, and citizen science.

This year's themes focus on sharing information globally in accessible and expedited ways. Examples include

- Rare disease data sharing to assist patients in finding others like them;
- The significance and opportunities for emerging nation, rural community, and citizen science in the global data ecosystem;
- New and emerging trends in scholarly publishing for research data objects;
- New constructs for transparency in scholarly communications;
- Revitalizing the skillsets of emerging and current researchers for digital dissemination;
- Balancing the demands of openness and security in ethical ways; and
- Access to information for disabled or financially disadvantaged consumers.

Dates and Venue

Pre-conference workshops: Collaborative Life Sciences Building, Oregon Health & Science University (OHSU), Portland, Oregon, Sunday, April 17, 2016.

Main conference: The Gerding Theater at the Armory; Portland, Oregon, Monday-Tuesday, April 18-19, 2016.

Executive Board Minutes

NASIG Board Conference Call May 1, 2015

Attendees

Executive Board:

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

Members at Large:

Eugenia Beh
Clint Chamberlain
Maria Collins
Wendy Robertson
Sarah Sutton
Peter Whiting

Ex Officio:

Kate Moore

Guests:

Anna Creech, incoming Vice President/President-Elect
Michael Hanson, incoming Treasurer-elect
Christian Burris, incoming Member-at-Large
Laurie Kaplan, incoming Member-at-Large

Regrets:

Joyce Tenney, Past-President
Kelli Getz, incoming Secretary
Steve Oberg, incoming Member-at-Large

The meeting was called to order at 11:07am

1.0 CPC Update (Tenney)

Tenney reported by email that all is well.

2.0 PPC Update (Kelley and Creech)

Creech reported that all speaker MOUs are signed.

The PPC approved a last minute Great Ideas Showcase addition covering the 40th Anniversary of the ISSN.

Confirmation of A/V arrangements is in process. The contract and quote is currently under review.

3.0 Joint NASIG-SSP Programming Update (Kelley)

The joint program will be included in the *NASIG Proceedings*. The speaker letters for SSP and NASIG will be merged for speaker signature for inclusion in the *NASIG Proceedings*.

SSP does audio recordings of all sessions rather than video. Kelley has requested that our recorders have access to the recordings for the *Proceedings* write-ups.

The Board discussed having a satellite registration desk at the SSP location, but it was determined to be too complicated to duplicate everything. Instead, the Board recommend rather having a “temporary registration” option only and refer people to the main desk at the Hilton for their full packet and official NASIG badge.

The dinner for the speakers and the SSP/NASIG planning group is scheduled for Tuesday.

Kelley will send a message to NASIG-L reminding folks that SSP is a more business casual conference (NASIG casual dress code vs. SSP dress code). The Mentoring Committee needs to make sure the message is distributed by the mentors to their mentees.

4.0 30th Anniversary Task Force Update (Borchert)

The TF is working on the final details, including the trivia contest, the dessert reception budget, where-are-they-now presentation, and organization history.

5.0 Legal Name Change (Kelley)

The State of New York has a form for legal name changes for organizations. Kelley has filled out a form for review by Tenney, Geckle, and Borchert. There is a \$30 filing fee to change the name.

Next step will be seeing what paperwork we need to submit to the IRS regarding our non-profit status.

6.0 Tag Line for Name (Kelley)

The Board voted and agreed to pilot the tag line: *Advancing and transforming the information resources community.*

The tag line will be announced at the Opening Session. Next steps include adding it to the membership brochure, posting it on the webpage, and sending a blast message to all members with the formal announcement after the conference.

The tag line will also be incorporated into the opening slides that cycle prior to the Vision Speakers.

7.0 Business Meeting/Brainstorming at Annual Conference (Kelley)

Bob Persing has volunteered to be Parliamentarian for the Business Meeting and facilitate the Brainstorming session.

The Board reviewed the topics to be covered during the Business meeting: where we are now, review of past few years and our current trajectory regarding name change/vision and mission statement changes and what it means (scope of organization); financial update (stability, including our contingency fund); responsibility and planning ahead for the organization; and the Code of Conduct and the importance of it (ensure members feel safe attending events/conferences).

The Board also discussed the Brainstorming Topic: discuss the Indiana legislation issue and impact of cancelling a conference (including contract and financial

impact); discuss contingency ideas for handling moving or canceling a conference and under what circumstances we would do that; and discuss criteria for future sites. McKee and Tenney have agreed to provide details related to site selection as needed.

8.0 Archives Issues (Kelley and Whiting)

The 30th Anniversary Task Force has been having lots of issues getting access to the archives at the University of Illinois. Kelley proposes creating a task force to review the current archives set-up and possibly moving it to a new location to improve responsiveness/service/access. Any move would also include an expense. The task force will also need to review incorporating born digital materials or setting up online access to our digital materials. Currently the University of Illinois site can only accommodate paper archives, photographs, or materials on USB drives, and cannot accept physical objects. The task force should investigate whether another site would be able to accommodate physical objects and not just paper and photos.

9.0 New Business (All)

The CEC has the video for the Ebook Freak-Out event. They need to edit the video into 2 chunks (before and after the lunch break) before posting it online. Chamberlain will talk to the CEC about getting the video edited and posted for members.

10.0 Old Business/Action Items Review (All)

The Board will have a contract for review soon documenting the new arrangement with Taylor & Francis regarding the NASIG Proceedings.

Collins is working with Dresselhaus on the proposal for expanding the Proceedings Editors into a full Proceedings Committee. Dresselhaus is suggesting 3 additional positions (modeled after the Newsletter), and adding a stipend for 2 of the 3 new positions to attend the Conference, in addition to the existing stipends already in place for the co-chairs.

The Board has agreed to experiment with having a drawing for gift cards for recorders that submit their documents by the deadline. Geckle and Collins will discuss with proceedings editors the process for drawing and handing out the cards.

The Board will email McDanold updates to the Action Items.

Meeting was adjourned at noon.

Minutes submitted by:
Shana McDanold
Secretary, NASIG Executive Board

Approved by the NASIG Executive Board October 7, 2015

NASIG Board Conference Call May 14, 2015

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:
Maria Collins
Wendy Robertson
Sarah Sutton
Peter Whiting

Ex Officio:
Kate Moore

Guests:
Ted Westervelt and Mark Hemhauser, CPC co-chairs
Anna Creech, PPC chair/incoming Vice President/President-Elect
Danielle Williams, PPC vice chair
Michael Hanson, incoming Treasurer-elect

Christian Burris, incoming Member-at-Large
Steve Oberg, incoming Member-at-Large

Regrets:
Eugenia Beh, Member-at-Large
Clint Chamberlain, Member-at-Large

Kelli Getz, incoming Secretary
Laurie Kaplan, incoming Member-at-Large
Anne McKee, Conference Coordinator

The meeting was called to order at 4:06pm.

1.0 CPC Update (Tenney, Hemhauser, Westervelt)

Westervelt reports the final walk through with the hotel went well.

There are a few changes to room assignments based on registration numbers but nothing unmanageable. They reviewed the assigned rooms and sessions with Creech to confirm space needs based on registration numbers. The only space still undecided is the one for the Great Ideas Showcase. The CPC is hoping to use the hallway next to the room with the Snapshot sessions to facilitate access/traffic to both events.

The CPC asked what to do about NASIG folks that go directly to the SSP joint meeting without going by registration desk first. The SSP registration desk will be provided with lists of our attendees that registered for the joint program. Attendees will be provided with a nametag to attend the joint session. If they are not on the list, then they will not be allowed to attend the joint session. NASIG attendees will still need to check in at the NASIG location to receive their badge and packet.

Tenney reports there do not appear to be any other meetings happening simultaneously at the hotel. NASIG is using the in-house A/V company, and they seem to be flexible about last minute adjustments.

Hemhauser reports the budget is on track.

The opening session and dinner is all in the same space.

Tenney has a vendor for the free t-shirts for early bird registrants and will be starting production soon. Geckle will authorize payment of half the total amount prior to the conference.

Kelley advises against having live entertainment at the opening session/dinner due to space constraints. Westervelt and Hemhauser will check with the hotel on having piped in music instead. If entertainment is still needed, Tenney recommends having a group in the lobby by the food buffet.

For allergies, a list will be sent to the banquet services of food allergies with a corresponding list of names. Individuals will be advised in their packets to be sure self-identify with the servers of their allergies.

The registration desk will be open at 7am at the Hilton on Wed. May 27 to accommodate those attending the joint SSP session. It will not be open on Tuesday.

Robertson will check with Awards & Recognition about awards being shipped to the Hilton and if CPC needs to be watching for boxes.

2.0 PPC Update (Kelley, Creech, Williams)

Creech reports room are all set and the speakers are all registered.

3.0 Joint NASIG-SSP Programming Update (Kelley)

The hashtag for the session is #SSPNASIG

The SSP registration desk will be provided with lists of our attendees that registered for the joint program. Attendees will be provided with a nametag to attend the joint session. If they are not on the list, then they will not be allowed to attend the joint session.

Directions to the Marriott will be included in the registration packets. Kelley will send a message to NASIG-L to remind people to stop by the NASIG registration desk at the Hilton prior to walking over to the Marriott. The CPC will also include that in pre-

conference communications. The messages will also include a statement that you MUST have pre-registered for the joint session in order to attend; no on-site registration option is available.

Kelley will ask Ivins about which Marriott ballroom will have the joint session so we can inform people as they check-in at registration at the Hilton.

4.0 30th Anniversary Task Force Update (Borchert)

Borchert reports the Task Force is finalizing plans and decorations. The dessert menu is finalized and the Task Force is waiting for the final head-count (deadline May 22) to deliver to the caterer. Tenney will need a copy of the banquet event order for the dessert reception.

Cook wants to discuss the remarks portion of the event with Borchert and Kelley. Awards will NOT be part of the event.

The DJ confirmed and committee members are suggesting songs that span the 30 year history of NASIG. They are also posting song suggestions/requests on the NASIG Facebook page.

The trivia will include both NASIG and non-NASIG related questions.

Sullenger is working on a slide show of past NASIGs as well as a "where are they now" slide show for past award winners.

5.0 Conference Proceedings Committee proposal (Collins)

The proposed structure of the committee is approved.

The Board approved free-conference registration for the two members expected to attend the conference, but not an additional stipend.

The stipend for the two editors is funded by Taylor and Francis.

Suggested edits include spelling out the roles of all 5 Committee members and better naming of the different editor roles for clarity.

ACTION ITEM: Collins will edit and re-submit it to the Board for a vote of approval. Once approved, Dresselhaus will proceed with recruiting.

6.0 New Business (All)

Kelley has received the proposed contract back from Taylor & Francis. Kelley, Collins, Borchert, and Tenney are reviewing it and will be sending back a counter-contract with a few corrections. Once the final version is received, it will be sent to the Board for vote.

McDanold will be sending out the edited minutes and updated Action Items for review and vote prior to the Conference.

The call adjourned at 4:50pm.

Minutes submitted by:
Shana McDanold
Secretary, NASIG Executive Board

Approved by the NASIG Executive Board October 7, 2015

NASIG Board Meeting

Date: May 30-31, 2015

Place: Crystal City Hilton, Arlington, VA

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:

Eugenia Beh
Clint Chamberlain
Maria Collins
Wendy Robertson
Sarah Sutton
Peter Whiting

Ex Officio:

Kate Moore

Guests (incoming Executive Board Members):

Anna Creech, PPC chair/incoming Vice President/President-Elect
Kelli Getz, Incoming Secretary
Michael Hanson, incoming Treasurer-Elect
Christian Burris, incoming Member-at-Large
Laurie Kaplan, incoming Member-at-Large
Steve Oberg, incoming Member-at-Large

The meeting was called to order at 1:00pm on May 30, 2015.

1.0 Welcome (Kelley)

Kelley passed around a thank you card from the all-timers for the lifetime membership.

Kelley reminded those present that the 2014/2015 Board members are the voting members for this meeting. The incoming 2015/2016 Board is here to observe and participate, but their votes will not count.

2.0 Recap of Conference (All)

The Board discussed feedback on the conference.

3.0 Secretary's Report (McDanold)

3.1 Meeting Minutes

Oct. 2014 – Mar. 2015 approved

VOTE: Whiting moved to approve Oct. 2014 through Mar. 2015 minutes. Seconded by Beh. All voted in favor.

3.2 Action Items Update

3.3 Approval of Board Activity Report

NASIG Executive Board Actions January-May 2015

- January 23, 2015:
 - Board approves the revised 2015 NASIG Committee Budget estimates.
 - Board approves the PPC proposed slate of programs for the 2015 Annual Conference.
- January 28, 2015: Board approves the Code of Conduct.
- February 19, 2015: Board approves support for the Ebooks Freakout event at Wake Forest University at \$500, with the request to note NASIG's sponsorship and to have NASIG membership brochures and 2015 Conference flyers at the event.
- March 3, 2015: Board approves the new three-year contract proposed by Taylor & Francis that incorporates a 6 month embargo for new content, with all previous proceedings open-access, no author fees, and author permissions to submit post-prints to institutional repositories.
- March 25, 2015: Board selects "Advancing and transforming the information resources community" for use as the NASIG tag-line.

- April 10, 2015: Board approves funding to print 300 copies of the NASIG membership brochure for use at upcoming events.

- May 14, 2015: Board approves the contract with Non-Profit Help dated 2015-2016.

VOTE: Tenney moved to approve the Board Activity Report. Seconded by Sutton. All voted in favor.

4.0 Treasurer's Report (Geckle)

Geckle reports NASIG is financially solvent. She does receive inquiries about NASIG's financial "cushion" should something happen.

The 2015 Conference financials will not be finalized until August 2015. The 30th Anniversary funds came from earmarked surplus from the 2014 Conference in Fort Worth that were not part of the 2015 conference budget. The SSP bill will impact the conference financials.

For recording the SSP funding in the Conference financials, there will be a separate line item in the Conference budget, after the Conference budget total, with an asterisk delineating the SSP costs. The reported SSP attendance was 169 people.

Geckle will separate out the 30th Anniversary Committee costs in the same manner as SSP.

The overall L-Soft expenses (for SERIALIST) are lower than anticipated.

To date, the webinars have profits of \$8,700.

5.0 Print Serials Core Competencies and TF Recommendation (Sutton)

Sutton reports the NASIG Core Competencies are mentioned at ER&L, in instruction circles, and by library directors (public and academic libraries).

Sutton proposes the following for a review cycle for all Core Competencies:

- the CEC administers the review;
- review one competency a year, putting out call for volunteers to review (at least 3 people on review team);
- the review sent to CEC and then to the Board for approval via vote;
- if changes are substantial, CEC may submit to the membership for discussion prior to submitting to the Board for approval
- order of review:
 - E-Resources
 - Print Serials
 - Scholarly Communications

VOTE: Motion to approve the proposed review cycle by Robertson. Seconded by Whiting. All voted in favor.

ACTION ITEM: Update CEC charge to include reviewing the Core Competencies

The Core Competencies for Print Serials Management have been completed. The organization is the same as the E-Resources Core Competencies and the two Competencies are closely related.

The Board thanks the committee for the work of the Task Force in doing both sets of competencies.

VOTE: Borchert moved to approve the Print Serials Management competencies and release the Task Forces from their duties. Seconded by Tenney. All voted in favor.

Tenney asked that a report or editorial be submitted to a professional journal about the process and the use of the competencies.

ACTION ITEM: Sutton and Beh will discuss with the Core Competencies Task Force the idea of submitting a report or editorial to a professional journal regarding the process and use of the Core Competencies.

ACTION ITEM: Reformat Core Competencies to HTML or PDF rather than Word; ensure that PDF has NASIG logo; replace links on NASIG webpages and ALA pages; ALA page should link to the Core Competencies page; check for re-directs; add a link to the Core Competencies page under Publications as well as keeping the link under Education (CMC; Burris)

6.0 Committee Reports including Consent Agenda (All)

- Archivist has no agenda items or questions for the Board.

- Awards and Recognition

The Committee needs to increase marketing for Merriman award and Birdie award.

Joe Hinger will serve as the standing ex-officio to A&R to handle the Mexican Student Grant Winner. This year the partnership was very successful.

ACTION ITEM: Ask A&R to expand the scope of the subject matter for as many of the awards as possible to incorporate e-resources and scholarly communications (Creech)

ACTION ITEM: Ask A&R to increase marketing to students (work with SOC) and increase marketing of all the awards to increase visibility of the awards to increase applications (Creech)

ACTION ITEM: Review and update the A&R manual (or create one) for service awards, other grants/awards, and the communication processes (Creech)

Creech noted that the Merriman Award winner from UKSG did not receive a plaque and the winner wasn't included in the announcements. The procedures for the Committee need to include them and include a certificate for the winner.

ACTION ITEM: Add to the manual: the USKG winner is included in the awards announcements at the Conference. (Creech)

- Bylaws has no agenda items or questions for the Board.

Made a change to the Bylaws charge and made the change to the Bylaws reflecting the NASIG name change.

- Communications & Marketing Committee has no agenda items or questions for the Board
- Conference Proceedings Editors

The Editors want to know if they can require speakers to write their own reports if they can't find a recorder/volunteer. The Board agreed to give speakers the option to write their own; if not, we have to find a recorder.

The Editors also do not want to do a raffle for submitting reports on time.

ACTION ITEM: Encourage editors to ask the student award winners to be a recorder for a session for future conferences (they get a byline in the Proceedings) (Collins)

The Editors also brought up confusion with Program Planning Committee about the MOU and deadlines. There is a need for a more formal timeline/checklist shared by both PPC and Proceedings for author communications and deadlines.

Dresselhaus submitted a proposed change to a committee structure, similar to the newsletter. The Board feedback on draft was accepted and a revised version will be sent to the Board for vote. Dresselhaus will recruit members for the new roles.

The Board was also reminded to edit the license to publish that is sent to the authors to reflect the

updated/new T&F contract and the license and author-rights pilot starting with the 2015 Conference Proceedings. December 2015 is the latest for completing the edits to the license to publish.

- Continuing Education Committee has no agenda items or questions for the Board.

Oberg asked who will be taking over the handbook. The new chair will work on it with help from the rest of the Committee. Modeled after the UKSG e-resources handbook, it will be open to the community (beyond the membership), including crowdsourced aspects, and the structure will correspond with the Core Competencies sections. The goal is for the handbook to be a companion to the core competencies.

Kevin Ballster is heading up a group to revisit the editing/updating of the NASIG Wikipedia entry.

Webinar content archiving must involve the Archivist. The Committee will also look at the Educopia effort.

The Committee is looking at brownbag or Twitter chats, and possibly adding additional webinars in partnership with NISO.

- Database and Directory has no agenda items or questions for the Board.

ACTION ITEM: The membership directory needs to be cleaned-up; old invoices need to be purged, etc. (Geckle) Notify CMC when complete for updating the NASIG listservs, etc.

ACTION ITEM: Committee rosters need to go to both D&D (membership section) and CMC (public facing webpages) for updating (Borchert)

ACTION ITEM: D&D needs to review manual (monthly reports, etc.). (Geckle)

ACTION ITEM: Update the information on who to contact if you have problems updating your member

record in the record itself (contact chair of D&D).
(Geckle)

- Evaluation and Assessment has no agenda items or questions for the Board.

The evaluation includes questions about the SSP event.

- Financial Planning Task Force

The Task Force held a meeting at the Conference. The goal is to submit something to the Board for May 2016 review. The Treasurer will be added as an ex-officio member.

- Membership Development Committee has no agenda items or questions for the Board.

The Committee is currently analyzing the data from the survey of non-attendees of the Ft. Worth conference.

ACTION ITEM: Prepare a survey for non-attendees of this DC conference; possibly poll the first timers to find out why they didn't return. (Kaplan)

Committee wants to analyze the trend lines from the past few surveys and review the one-day conference attendance data.

ACTION ITEM: MDC put forth a push to increase membership (put forth a plan of action and a marketing plan; work with Student Outreach and the Publicist). (Kaplan)

ACTION ITEM: CPC and PPC work together to do targeted marketing before the conference pushing out content to increase attendance; CMC work on continuing to push conference content post conference (SlideShare, etc.) (Kelley, Creech, and Burris)

Kelley/Borchert suggested the MDC surveys could contribute to strategic planning as an organization discussing conference, membership, new directions, etc.

- Mentoring Committee has no agenda items or questions for the Board.

The Committee noted that they want to give out gift cards again next year at the First Timer's Reception, given this year's success.

ACTION ITEM: Mentors follow up with mentees sometime in the fall (reminder from Mentoring committee) to encourage attendance at next conference and follow up on impact of previous conference. (Collins)

- Newsletter

The Advertising editor needs to know if organizational members get a free ad in the newsletter.

- Nominations & Elections has no agenda items or questions for the Board.

Shadle is creating the manual and a draft is complete.

- Scholarly Communications Core Competencies Task Force has no agenda items or questions for the Board.

- Site Selection Committee will be discussed in a later agenda item.

- Student Outreach Committee

There are many library schools that are missing ambassadors. The Committee will post to the Facebook pages for the schools (if they have one) to push content and award opportunities.

The Committee is seeking more ambassadors and more onsite visits to schools to promote NASIG.

The Ambassador program is more formalized. The Committee will work with the Mentoring Committee to put a program in place for ongoing mentoring of students, including those that do not attend the conference.

The Committee has also increasing their marketing.

ACTION ITEM: Ask SOC ambassadors to attend events or classes at library schools to push NASIG membership (Collins)

Tenney suggests that NASIG investigate developing an online course (MOOC), potentially in a partnership between Student Outreach and Continuing Education Committees.

Boissy suggested students to do Snap Shot presentations during the conference, which may give them funding support as “travel stipend”? This should be managed by Student Outreach rather than Awards & Recognition. Collins will follow up with Boissy.

ACTION ITEM: Collins will follow up with Boissy on a student focused Snap Shot Conference session.

7.0 Streamlining Organizational Memberships and Sponsorships, including Newsletter Advertising (Geckle)

The Board reviewed the proposed changes to the Sponsorship form and Organizational Membership forms. [NOTE: see separate document of revision ideas, and chart/forms.]

The chart will make things much simpler for understanding benefits.

Sponsoring the Birdie award would count as Tier 2 sponsorship.

There is also a type for organizational members to designate them within the directory for renewal and contact purposes.

Feedback from the Board on Geckle’s proposals included:

- Ensure there’s communication with PPC and CPC about sponsors and their benefits.

- Clarify the conference registration rate situation for organizational members versus sponsors
- Conference event sponsorship should be \$1,000, or Tier 4 benefits
- Remove the listed benefit of being in the conference program as NASIG no longer publishes a printer program
- Add benefit of being in the Schedule notes of who is sponsoring that session or event
- Add bottled water as an option for conference event sponsorship for appropriate locations (such as Albuquerque, NM)

The Board also suggests adding Newsletter ads to the chart for Tier 1 and Tier 2 sponsorships:

- Add a separate option of having an advertisement independent of the sponsorships; this benefit mentioned to vendors by the Past President as part of sponsorship discussions
- The workflow is as follows:
 - Newsletter has an advertising editor
 - List of Tier 1 and Tier 2 is given to Newsletter advertising editor for arrangements
 - Send link to vendor for ad details

ACTION ITEM: Add information to conference registration website that Tier 1 sponsors get the registration list to send a one-time blast message prior to the Conference to all conference attendees (Kelley)

ACTION ITEM: Add link to sponsorship page from Newsletter for ad information (Moore)

ACTION ITEM: Sponsorship and Organizational Memberships – unified page – linking from Conference website and Membership; add link information about sponsorship/benefits (Burriss)

ACTION ITEM: Remove the 2013 and 2014 conference attendee lists and put up the 2015 conference attendee lists (Lisa Martincik has 2015 list) (Burriss)

ACTION ITEM: Geckle will update the proposed forms and send to the Board for approval.

8.0 Organizational Sponsorship Update (Tenney)

The total sponsorships received for the 2015 Conference was \$28,125.

Tenney recommends that the Past-President sends the initial letter as soon as the Vendor Expo time slot is decided by PPC and to send monthly follow up emails.

Tenney will pass on spreadsheet of contacts to Kelley.

VOTE: Tenney moved to place all sponsorship monies into the conference budget rather than splitting between membership and conference. Seconded by Robertson. All voted in favor.

ACTION ITEM: Explore the option of a “Vendor Visit” challenge to increase traffic at Vendor Expo, e.g., have a card with all the sponsors listed and as members visit each booth (or a specific number of vendors) to check off and then do a raffle for gift card(s) for those that complete the card. (Kelley)

9.0 Site Selection (Borchert, Kelley)

The Board discussed the timeline for the 2018 conference RFP and the appointment of the CPC co-chairs.

10.0 Archives Task Force (Borchert)

VOTE: Whiting moved to accept the proposed charge. Seconded by Robertson. All voted in favor.

Current Archivist will serve as Chair of the Task Force.

11.0 Promotion of New Tagline (All)

NASIG’s current tagline: *Advancing and transforming the information resources community*

Comments from members included the tagline was too long and not very memorable. They do like the verb “transform” and the use of “community” in the tagline.

Proposed revision (streamlined) by the Board:
Transforming the Information Community

The Board reviewed where to post the tagline on the website. It will be placed under or next to the logo, with the goal of pairing the tag line with the logo. However, they will remain as separate elements so the tag line can evolve without impacting the logo in the future.

It was noted that NASIG currently has two logos in use: the Newsletter logo with the globe and the website logo without the globe

The Board agreed to design a new logo to be used consistently on all NASIG related material.

VOTE: Whiting moved to approve funding to contract with a graphic designer to work on pairing the tag line with a redesigned logo in a modular fashion (so tag line can be updated), using the same color scheme. The designer will provide several options for the Board to review and select from. Seconded by Robertson.

All voted in favor.

Geckle will contact the graphic designer that has worked on the past few Conference logos.

ACTION ITEM: CMC will review the website and all documentation with our logo to replace with the logo/tag line combination. (Burriss)

ACTION ITEM: Start including the tag line on all textual communications. Review CMC social media connections to add the tag line where possible. (All; Burriss)

NASIG

Transforming the Information Community

ACTION ITEM: CMC review moving the NASIG FB Group page to a FB Page. (Burriss)

12.0 Parking Lot Issues (All)

Future discussions (incoming Board): Anne Kenney's slide covering NASIG's suggested actions.

ACTION ITEM: CEC review the existing ALCTS courses to possibly have a NASIG taught course to fill in the gaps (e.g. a "continuing resources acquisitions" or "database management" focused course; and tie-in the e-resources handbook) (Robertson)

ACTION ITEM: Committees create a brief list of activities (distilled down from the charge and include updating) to be used for recruiting volunteers for appointments (Creech)

ACTION ITEM: Review and update the Café Press designs to reflect the name change and (when approved) the updated logo and past/current conference information. (Kelley)

Whiting moved to adjourn the meeting. Seconded by Robertson.

Meeting adjourned at 11:22am May 31, 2015.

Minutes submitted by:
Shana McDanold
Secretary, NASIG Executive Board

Approved by the NASIG Executive Board on October 21, 2015.

Committee Annual Reports & Updates

30th Anniversary Celebration Task Force 2014/2015 Annual Report

Submitted by: Eleanor I. Cook

Members

Eleanor Cook, chair (East Carolina University)

Sara Bahnmaier, incoming archivist, 2015/2018
(University of Michigan)

Karen Davidson, member (Mississippi State University)

Christie Degener, member (University of North Carolina
at Chapel Hill)

Jeff Slagell, member (Delta State University)

Paula Sullenger, archivist (Texas A&M)

Esta Tovstiadi, member (University of Colorado-
Boulder)

Jenni Wilson, member (Sage Publications)

Leigh Ann DePope, CPC liaison (University of MD)

Carol Ann Borchert, board liaison (Univ. of South FL,
Tampa)

Continuing Activities

None, although part of the original charge will be taken up by a new task force that is reviewing the archives. (See narrative under Recommendations to the Board.)

Completed Activities

The task force successfully executed the main part of its charge, which was to provide a 30th anniversary celebration event. This was held on Friday night, May 29, 2015 at the Crystal City Hilton. The committee also supplied, as part of the event, a History Timeline, which placed NASIG themes in relation to popular culture and news events that occurred between 1986 and 2015. We also supplied a slide show entitled "Where Are They Now?" which showcased a selection of past award winners with quotes from them about how NASIG positively influenced their careers. During the dessert reception we provided a DJ and dance floor and also held a trivia contest in an adjoining space. We also shared the "Top 30 NASIG Memories" with the crowd, based on feedback we gathered at an informal "Old Timer's Get Together" on Thursday night, as well as

soliciting ideas for this via lists on the message board and over social media.

Budget

\$25,000. Final details on expenditures are forthcoming once the Treasurer is able to supply them.

Here is a snapshot of our expenses:

Dessert reception (food, labor, etc.): \$17,690.06

(based on Banquet Check #30576)

DJ services: \$1,750

Decorations & favors: \$1,436.38

Total event expenditure: \$20,876.44

Statistical Information

Approximately 245 registrants and their guests attended the 30th Anniversary event.

Action(s) Required by Board

None

Recommendations to Board

There was one part of the charge to the 30th Anniversary Celebration Task Force that was not completed -- the assignment "to produce an updated official history of NASIG, as an addendum to what was produced for the 25th anniversary" still needs to be done. Due to access and service issues with the NASIG archives and competing priorities, this task was left incomplete. However, the NASIG Board has created a new Archives Task Force, whose charge is "to investigate the issue of accessing materials currently housed in the archives and to make a recommendation regarding possibilities for managing the NASIG archives in the future. One or more task force members may need to travel to the current archives location. The task force will submit a report to the Board with recommendations for preserving the archival material produced by NASIG."

Sara Bahnmaier and Eleanor Cook from this group will be serving on the new task force and expect to carry this assignment over and complete it in the next year.

Submitted on: June 23, 2015

Archives Task Force Update

Submitted by: Sara Bahnmaier

Members

Sara Bahnmaier, chair (University of Michigan)

Jeannie Castro, member (University of Houston)

Eleanor Cook, member (East Carolina University)

Jaymie Turner, member (University of Oklahoma)

Peter Whiting, member (University of Southern Indiana)

Carol Ann Borchert, board liaison (University of South Florida)

Continuing Activities

The [Archives Task Force](#) convened (2015-16)

Charge: The charge of the Archives Task Force is to investigate the issue of accessing materials currently housed in the archives and to make a recommendation regarding possibilities for managing the NASIG archives in the future. One or more task force members may need to travel to the current archives location. The task force will submit a report to the Board with recommendations for preserving the archival material produced by NASIG.

Archives Task Force will produce an updated official history of NASIG, as an addendum to what was produced for the 25th anniversary.

The Archives Task Force will include a recommendation for archival photographic and audiovisual material in its report. See:

<https://groups.yahoo.com/neo/groups/NASIGpix/info>

Budget

Request up to \$900 for one or two TF members to travel to the Archives.

Estimated travel to/from NASIG Archives in Urbana, IL for Peter W. and Sara B.

If two members go, driving @ 57.5 cents per mile (700 round trip from Michigan, 400 round trip from Evansville, IN) plus parking and 1 overnight room (for PW) is estimated at \$900. If one only (Sara) goes, the cost is about half.

Submitted on: August 17, 2015

Archivist 2014/2015 Annual Report

Submitted by: Sara Bahnmaier

Members

Sara Bahnmaier, chair (University of Michigan)
Jaymie Turner, member (University of Oklahoma)
Kelli Getz, Board liaison (University of Houston)

Continuing Activities

Archival Collecting and Depositing

Archives at University of Illinois holdings database for NASIG (See: <http://archives.library.illinois.edu/archon/?p=collections/controlcard&id=3140>)

Peter and Sara visited the Archives and deposited documents current through 2012. The Archives have not yet added the new material, according to the holdings database at UIA. Sara will follow up.

The photo historian and archivist have access to a Yahoo photo site created to support the 25th Anniversary celebration (See: <https://groups.yahoo.com/neo/groups/NASIGpix/info>)

Completed Activities

Rotation

Paula Sullenger was the outgoing Archivist until June 2015. Her successor is Sara Bahnmaier, formerly Archivist-in-training, 2014-2015.

Deborah England was the outgoing Photo Historian until June 2015. Her successor is Jaymie Turner, formerly Photo Historian-in-training, 2014-2015.

Peter Whiting was succeeded as Board Liaison by Kelli Getz as of June 2015.

Discovery of the 25th Anniversary Celebration Missing Tape

During the visit on Feb. 1, 2015, Peter W. and Sara B. searched for a DAT (digital audiovisual tape) that was deposited after the 25th Anniversary Celebration. We needed to use it for the 30th task force. The Archives staff did not find it until after the event, but we now have the online record. An access copy is available upon request. (See Born-digital audiovisual records: <http://archives.library.illinois.edu/archon/?p=digitallibrary/digitalcontent&id=9536>)

30th Anniversary Celebration

From an idea contributed by Paula Sullenger, and work produced by Sara Bahnmaier, a [historical timeline of NASIG 1986-2015](#) was displayed at the conference in Washington, D.C., and has been uploaded to SlideShare.

Budget

None.

Submitted on: August 17, 2015

Communications and Marketing Committee Update

Submitted by: Paoshan Yue and Julia Proctor

Members

Paoshan Yue, co-chair (University of Nevada, Reno)
[Webspinner]

Julia Proctor, co-chair (University of Wyoming)
[Listmanager]

David Macaulay, vice co-chair (University of Wyoming)
[Webspinner]

Jessica Ireland, vice co-chair (Radford University)
[Listmanager]

Beth Ashmore, SERIALST manager (Samford University)

Leigh Ann DePope, publicist (Salisbury University)

Jennifer Arnold, member (Central Piedmont Community
College)

Chris Bullock, member (California State University
Northridge)

Steve Fallon, member (De Gruyter)

Smita Joshipura, member (Arizona State University)

Christian Burriss, board liaison (Wake Forest University)

Continuing Activities

- SERIALST monitoring became a new monthly duty in July. A CMC member would serve as a SERIALST co-monitor to assist with approving messages.
- New committee members are rotating on regular duties (blog, jobs blog, spam filter and SERIALST monitoring*).
- The committee is working on adding the new tagline (“Transforming the Information Community”) to official textual communications, such as website and e-mails signature files.
- Publicist consults with and sends announcements from committee chairs or the board as requested to external lists.
- Publicist schedules tweets and re-tweets of items of interest, including events (with repeated reminders of deadlines), availability of presentations,

proceedings, etc.; advertises the Jobs Blog; and scans the Newsletter for individual items to highlight; posts items of interest to Facebook and/or LinkedIn.

- SERIALST manager approves posts, collects posts for weekly commercial digest, and assists list members with subscription issues.

Completed Activities

Web

- The web training for new chairs was conducted via webinar on June 22, 2015. The webinar recording was shared with all committee chairs after the training.
- Updated committee pages, member center group spaces, and web permissions for new members
- Removed the 2013 and 2014 conference attendee lists and uploaded the 2015 list
- Uploaded the Core Competencies for Print Serials Management document to the website and submitted it to the ALA website
- Added the new tagline to social media descriptions (FB, Twitter, LinkedIn, SlideShare).

Listserv

- All committee listservs and forwarding email addresses were updated for 2015/16 in June.
- Non-member conference attendees were removed from NASIG-L by July 30.
- Renamed the committee listservs from @list.nasig.org to @internal.nasig.org on July 29, 2015.
- Adjusted the list settings for NASIG-L so that the “from” field is rewritten to be the list address rather than the actual email address of the poster.

Miscellaneous

- Uploaded 29 conference presentations to SlideShare

Budget

Budget Category	2015/2016 Estimate	Expenditures a/o 7/23/2015	Balance a/o 7/23/2015
Conference calls	\$0.00	\$0.00	\$0.00
Contracted services	\$0.00	\$0.00	\$0.00
Bee.Net (\$500 per month – email and listservs)	\$6,000.00	\$3,500.00	\$2,500.00
ArcStone (NASIG website and association management - \$300 per month + contingency amount of \$1450 for 10 hours of programming if needed)	\$5,050.00	\$2,100.00	\$2,950.00

Budget Category	2015/2016 Estimate	Expenditures a/o 7/23/2015	Balance a/o 7/23/2015
SERIALST maintenance	\$10,000.00	\$5,191.41	\$4,808.59
Survey Monkey (online surveys)	\$204.00	\$204.00	\$0.00
SlideShare Pro (conference presentations)	\$114.00	\$0.00	\$114.00
UKSG Newsletter	\$750.00	\$749.26	\$0.74
Contingency	\$882.00	\$0.00	\$882.00
TOTAL	\$23,000.00	\$11,744.67	\$11,255.33

Statistical Information

NASIG-L

NASIG has 28 listservs.

NASIG has 26 active @nasig.org email addresses.

As of 8/4/2015, there are 516 subscribed members to NASIG-L and 29 unsubscribed members.

SlideShare

29 presentations/posters were uploaded from the 2015 conference

Views

April 2015-July 2015 – 12,606

Total (since March 2012) – 134,366

Top Content August 2014–July 2015 (views)

- Getting to the Core of the Matter: Competencies for New E-Resources Librarians (3,877)
- Why the Internet is more attractive than the library (2,440)

- Wrangling metadata from HathiTrust and PubMed to provide full text linking to the Cornell Veterinarian (2,030)
- Cost-per-use vs. hours-per-report: usage data collection and the value of staff time (1,994)
- CORAL: Implementing an open source ERM (1,406)

Blog stats

(April 2015 –July 2015)

NASIG Blog visits – 2,993

Jobs Blog visits – 6,637

Website

Website sessions (Google Analytics)

April 2015-July 2015

April 2015	4,158
May 2015	5,505
June 2015	2,331
July 2015	1,370
Total	13,364

Top Ten Landing Pages (Google Analytics)

April 2015-July 2015

http://www.nasig.org/ and /site_home.cfm	6,971
/site_page.cfm?pk_association_webpage_menu=700 And /site_page.cfm?pk_association_webpage_menu=700&pk_association_webpage=1228 (both go to main page for annual conference)	2,313
/site_page.cfm?pk_association_webpage_menu=700&pk_association_webpage=1260	486
/site_page.cfm?pk_association_webpage_menu=308&pk_association_webpage=4955	476
/site_page.cfm?pk_association_webpage_menu=310&pk_association_webpage=1225	421
/site_page.cfm?pk_association_webpage_menu=700&pk_association_webpage=1234	232
/site_page.cfm?pk_association_webpage_menu=1346&pk_association_webpage=5372	216
/site_event_detail.cfm?pk_association_event=8535	141
/site_signin.cfm	118
/site_page.cfm?pk_association_webpage_menu=311&pk_association_webpage=4195	91

Twitter

As of 8/4/2015, @NASIG has 526 followers.

SERIALST

2,449 subscribers (as of 8/4/2015)
305 messages sent to subscribers from May 2015-July 2015

Submitted on: August 4, 2015

Conference Planning Committee 2014/2015 Annual Report

Submitted by: Mark Hemhauser & Ted Westervelt,
CPC co-chairs

Members

Ted Westervelt, co-chair (Library of Congress)
Mark Hemhauser, co-chair (University of California,
Berkeley)
Beth Guay, member (University of Maryland)

Liz Kupke, member (St. John's College)
Leigh Ann DePope, member (University of Maryland)
Chris Brady, member (Department of Justice)
Meg Del Baglivo, member (University of Maryland
Health Sciences)
Carol MacAdam, member (retired)
Sarah Perlmutter, member (EBSCO)
Anne McKee, conference coordinator/contract
negotiator (Greater Western Library Alliance)
Lisa Martincik, webspinner (University of Iowa)
Joyce Tenney, board liaison (University of Maryland
Baltimore County)
Katy Ginanni, registrar, Western Carolina University

The Washington, DC CPC had an extra month to plan it's conference due to the early date for the 2014 conference and the late May date for the 2015 conference, though it is uncertain if this extra time made much of a difference for the committee. At best, it allowed the CPC more time to think through a theme and developing the logo. The committee faced a few special challenges.

First, the conference was being held just outside Washington, which meant city activities would be challenging to pull off, and ultimately a special event in the city was abandoned for insufficient funds.

Second, the conference was a joint conference with the Society for Scholarly Publishing. Their schedule informed our schedule thus altering the usual sequence of conference events. Pre-conferences moved to post-conference, which was a Saturday and Sunday. This may have effected post-conference participation rates. This change also meant that the CPC had to re-think and re-organize the planning documents to put things in the new order. The joint conference brought additional costs to NASIG that limited the funds available for CPC and conference activities. The joint conference also seemed to encourage some of our regular sponsors to sponsor the SSP conference instead, which had an impact on our budget.

Third, there was a 30th anniversary committee which had its own small pot of money for a special event. While the 30th anniversary committee did a lot of its own work, CPC lent member support to investigating off-site venues for a party event, and worked on DJ and ballroom set-up issues.

Despite the additional challenges, the CPC planning effort worked very well. The co-chairs held a few online/conference call meetings to rally the troops to take responsibility for major planning activities and to follow through on them. We emphasized the need for individual initiative, reading the manual and taking ownership of a task, and asking questions to the whole group, since no one necessarily knew the answers. The co-chairs primarily directed committee members and sought information from the board and board liaison to help the CPC accomplish its tasks. The co-chairs intervened when needed to provide guidance, make changes and make decisions. The co-chairs reviewed and updated the food and budget planning and other documentation.

Tasks were distributed thus:

- **Leigh Ann DePope** - A/V, session room set-up, coordination with PPC on these, scheduling of additional volunteers, arrangement of the DJ for the 30th Anniversary reception
- **Chris Brady** - VIP room assignments. Chris, working with Joyce, prepared the original VIP room assignment spreadsheet. He worked closely with the hotel to ensure that it was correct in all specifics in the run up to the conference, identifying duplicate registrations and cancelling them.
- **Meg Del Baglivo** and **Beth Guay** - together they selected break foods and breakfast, planned the dine-arounds, prepared lists of local restaurants. Meg also worked with the tourist board to obtain local information about things to do and churches, etc. Beth created the CPC PowerPoint slideshow with vendor info and award winners.
- **Liz Kupke** - made room signs, managed the ribbon supplies and coordinated with the mentoring committee to help them put on the First Timers reception.
- **Carol MacAdam** - gathered information on things to do in the Washington area, helped with the packet stuffing and staffed the information desk and/or session rooms whenever needed.
- **Sarah Perlmutter** - arranged the Vendor Expo, coordinating with the vendors to ensure their needs were met, ensured that the room for the vendor expo was set and ready, both in terms of space and A/V.
- **Katy Ginanni** - served as registrar.
- **Lisa Martincik** - maintained and updated the conference website, and served as registrar in training, filling in for the registrar when the registrar was on a long vacation and came down ill at the conference.
- **Joyce Tenney** - as board liaison and planner extraordinaire, Joyce provided invaluable guidance throughout the planning process.
- **Anne McKee** - negotiated the contracts for the hotel, A/V, and DJ.

All members staffed the registration table during the conference and shared duties related to monitoring sessions and lending a hand where needed. Several committee members helped stuff conference packets the Sunday and Tuesday before the conference.

Three members changed jobs, two necessitating a move during the year, yet continued to make contributions to the conference planning.

Budget

The committee had approximately \$115,000 in expenses. Expenses consisted primarily of food, A/V, and the cost of supplies-photocopies, new ribbons, folders, and the like. There were no travel expenses for the committee since everyone was local.

The final conference financials are not yet available. These numbers are an approximation. The conference budget projected total expenses of \$137,000 with total income of \$150,000 creating a potential net of over \$10,000. The largest expenses came from food: \$83,400. AV services cost \$23,200. The income amount included \$28,125 raised in conference sponsorship from eleven vendors. Actual net expenses came to approximately \$115,000, with registration and sponsorships contributing \$150,000 in income. Net was approximately \$35,000 in the black.

Recommendations to Board

While it is not essential that all committee members live within 75 miles or so of the conference site, we found there were real advantages, and it should be encouraged to have CPC members this close to the conference site whenever possible. The advantages were not merely true in that they gave the committee the local knowledge and connections for planning events and providing guidance for visitors, but also meant that we could meet in advance of the conference for packet stuffing and we could have the CPC members in charge of the signs and of the Vendor Expo attend the walk through, which was very useful.

The Board should consider to what degree NASIG wants to market conference souvenirs. If NASIG wants to use them for marketing the organization (or, less likely, for profit), it needs to rethink the current practice. If the Board feels this is of no real value to NASIG or that the potential benefits of marketing NASIG in this way are minimal, then we should make it clear that the CPC should simply send the conference logo to Cafe Press and put a link on the website, which is all that is required to meet the needs of attendees who want a souvenir. Note that we tried to be selective in the types of t-shirts and knick-knacks we made available for sale.

It was recommended from last year to print a few copies (~50) of the conference program and at least that seems reasonable for those few people not able to use the online Sched. We had requests for paper copies, we accidentally printed more than we meant to. There needs to be a decision made about NASIG's primary mode of distribution of its conference program. Will it be via Sched online or by a paper copy included in the registration packet? This should then be made very clear to conference attendees.

Having the Vendor Expo during the conference is a very good idea. We recommend also tying this into a break and lunch time with food. For a regular conference schedule, we recommend that the vendor expo take place on the Friday, starting at the morning break and finishing at the end of the lunch break, thereby encouraging attendees to visit and allowing the vendors a chance to get home Friday afternoon.

Selecting the right amount of food was perhaps the greatest prediction challenge. More information from previous years as to the quantities purchased and consumed might be helpful. Also, valuable would be to have a NASIG-owned Google drive site that would easily allow passing valuable shared documents around. We have provided editing access to our online budget Excel form which we received as a MS Office Excel file from the 2012 CPC. We also loaded the CPC Manual to Google drive for on-the-fly editing and sharing.

Submitted on: July 25, 2015

Mentoring Group 2014/2015 Annual Report

Submitted by: Simona Tabacaru

Members

Simona Tabacaru, chair (Texas A&M University)
Sandy Folsom, vice-chair (Central Michigan University)
Adolfo Tarango (University of California, San Diego)
Eugenia Beh, board liaison (Massachusetts Institute of Technology)

Continuing Activities

A third member was added to the Mentoring Group last year. To ensure good continuity of committee activities, especially during the planning and coordination of the first-timers reception, I requested that the third member to be added to the group on a permanent basis.

Completed Activities

Overall, the mentoring program at the 2015 Conference was a success. Twenty-seven 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. The First Timers/Mentoring Reception was held in the Crystal Ballroom and was well attended not only by pairs of mentors and mentees, but also by first-time attendees who had not registered as mentees prior to the conference. Several experienced NASIG members at the reception offered to serve as impromptu mentors, as more first-timers/non-registered mentees showed up for the reception. 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.

With help from the Conference Planning Committee, we were able to provide a mix of tables, sit-down and stand-up tables for mentors/mentees to help them connect. Also we coordinated with CPC for providing ribbons for badges.

During First-Timer Reception, we organized a drawing which was very well received by all attendees. We used raffle tickets provided by CPC, and awarded gift cards (Amazon, Barnes & Noble, and Starbucks) to 3 first-timer attendees for the total amount of \$100. Our prize winners were: Carla Brooks, University of Michigan-Dearborn, Natascha Owens, University of Chicago Library and Kristine Sekely, Harrisburg Area Community College.

Our thanks go to those NASIG conference attendees who did attend the 2015 reception (including several board members, and volunteers from CPC) and were gracious enough to step in as mentors at the last minute. Also thank you to Susan Davis, outgoing chair, and Ann Ercelawn for their dedication and service on the Mentoring Group.

After the 2015 conference, the Mentoring Group conducted a survey of 2015 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 60% response rate. A summary of responses to the 2015 Mentoring program evaluation survey is provided below:

- Fifteen mentors and seventeen mentees responded to the survey.
- All fifteen mentors mentioned that they would participate in the program again, and one mentor suggested utilizing the Library Outreach Group a little bit more for publicizing the program.
- In answer to the question “What was your favorite part of the experience?” mentors reported:
 - Meeting new people and making new connections
 - “Helping the new attendees get acquainted and comfortable with both, people and how NASIG works in hopes they will enjoy the conference and want to continue to come in the future.”
 - Guiding, sharing ideas, advice; sitting in on the mentee’s presentation

- “Very nice reception”
- In answer to same question, “What was your favorite part of the experience?”, mentees reported:
 - The reception
 - “My mentor did a great job of reaching out to me and was happy to answer any questions, as well as giving me tips on things I didn't know to ask questions about - like suggestions for getting involved with committees. I also really enjoyed the first timers’ reception. It was great to meet with my mentor as well as meet with other mentor/mentee pairs.”
 - Networking, exchanging ideas, discussions
 - “Having access to someone who really understands what NASIG is all about and has that history of the organization.”
 - “I really enjoyed meeting my mentor!” was a recurring 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. Fifteen mentees answered that the program was valuable to them, one answered “not especially” and one mentee reported that her mentor never connected with her.
 - The program helped new comers feel comfortable, better understand the conference program, learn from other librarians’ experiences, and meet people who face similar problems and successes.
 - Some mentees said the program provided some insight into ways to get more involved with NASIG.
 - Other mentees valued the availability of “a go-to person for questions”, and the opportunity to meet new people: “I met several new contacts through my mentor.”
 - The mentee who reported that her mentor never connected with her said: “...I did think she might seek me out after that... I felt awkward simply going up and knocking on her door. I

had hoped she would touch base with me sometime after that first night, but did not. I did ask several people whether they knew her and one was gracious enough to offer to answer the questions I had.”

- In answer to the question “Have you suggestions for improving the program?” mentors suggested:
 - Matching people from similar or comparable institutions so they can share and compare experiences.
 - Include a question in the survey about “what are you hoping to get out of the experience”.
 - “Better communication of the pairings further in advance of the conference.”
 - “Make sure that first timer’s reception keeps going”.
- In answer to same question, “Have you suggestions for improving the program?”, mentees reported:
 - “No, it was pretty great.”
 - Shorten the reception from two hours to one hour.
 - Shortage of mentors for mentees, so I guess more mentors are needed.
 - Making clear guidelines for mentors.
 - Reception held in a larger room, with tables and chairs for everyone.
 - “Have a more structured program or at least a list of “Did you know?” things for table occupants to discuss. You wouldn't need one mentor per mentee this way, either.”
 - “Perhaps to instruct the mentor to reach out to the mentee.”
- 90.6% (29) respondents confirmed they would participate in the Mentoring program again, while 9.4% (3) responded “no” response to this question. This may indicate that most mentors/mentees had a good experience.

Other comments qualified the First-Timers reception as a “fun and great opportunity” and some librarians would like commit to this event: “I would be interested

in being a mentor after I've attended a few conferences because I would love to help a new attendee feel comfortable and have someone to talk to, as meeting new people does not come easy to everyone."

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 incoming chair, vice-chair, out-going 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

While the Mentoring Group does not require funding for its activities for 2015/16, I would like to request \$100 funding so we can sponsor another drawing/give-away prizes during the First-timers reception at the 2016 NASIG Conference.

Submitted on: July 15, 2015

Nominations & Elections Committee Update

Submitted by: Maria Hatfield

Members

Maria Hatfield, chair (WT Cox)
Patrick Carr, vice-chair (University of Connecticut)
Todd Enoch, member (University of North Texas)
Emily Farrell, member (De Gruyter)
Marcella Leshner, member (St. Mary's University)
Erika Ripley, member (University of North Carolina at Chapel Hill)
Marsha Seamans, member (University of Kentucky)
Steve Oberg, board liaison (Wheaton College)

Continuing Activities

- Finalize N&E timetable/schedule and send to committee & board members
- Review call for nominations for accuracy/currency and get revised form mounted on NASIG website
- Send broadcast message and NASIG-L reminder about nominations for offices

Completed Activities

None. This is the slow time of year for the committee.

Budget: \$100

Submitted on: July 31, 2015

2014/2015 Program Planning Committee Annual Report

Submitted by: Anna Creech

Members

Anna Creech, chair (University of Richmond)
Danielle Williams, vice chair (University of Evansville)
Benjamin Heet, member (North Carolina State University)
Buddy Pennington, member (University of Missouri, Kansas City)
Corrie Marsh, member (Old Dominion University)
Kittie Henderson, member (EBSCO Information Services)
Lisa Blackwell, member (Chamberlain College of Nursing)
Mary Ann Jones, member (Mississippi State University)
Patrick Carr, member (East Carolina University)
Rene Erlandson, member (University of Nebraska Omaha)
Sharon Dyas-Correia, member (University of Toronto)
Violeta Ilik, member (Northwestern University)

Continuing Activities

Danielle Williams will work to update the PPC handbook as needed.

Completed Activities

2015 Conference Program Slate

The principle business for the Program Planning Committee in 2014/15 was to oversee the execution of the program for the 2015 conference in Washington, DC.

Vision Speakers

Three Vision Speakers were selected by PPC and approved by the board: Dorothea Salo, Stephen Rhind-Tutt, and Anne Kenney.

Workshops

PPC identified topics and speakers for four workshops. These included COUNTER statistics with Jennifer Lefler, copyright with Lisa Macklin, license negotiation with Claire Dygert, and an eight-hour overview of RDA Authorities with Les Hawkins and Hien Nguyen. A total of 49 people attended the workshops.

Concurrent Sessions

PPC held one call for presentation proposals during the fall of 2014, which was extended for an additional week. A total of 55 proposals were submitted, and after a blind review, 30 were chosen by the committee to be included in the program. Declined proposals were encouraged to be submitted for the Snapshot Sessions.

This was our second year of using ProposalSpace for collecting and selecting proposals for the concurrent sessions. The committee made further use of the tool for communicating with potential speakers about their proposals, and for the first time, declined proposals were not communicated by the Board secretary, but rather through ProposalSpace.

Great Ideas Showcase and Snapshot Sessions

This was the third round of the Great Ideas Showcase, which had replaced the poster sessions and provided a space for interactive presentations that were not necessarily suited for flat media (though those are fine to be included as well). The committee received seven proposals and accepted all of them.

This was the second round of Snapshot Sessions. These short presentations allowed for the sharing of ideas and tools ranging from electronic resource management issues to standards and recommended practices updates. The committee received seven proposals and accepted six. After the conference, the committee received a request from Student Outreach Committee to set aside a separate time for student presenters, which is currently being reviewed by the committee and the Board.

Vendor Lightning Talks

NASIG Tier 1 sponsors (American Chemical Society, EBSCO, and Taylor & Francis) were invited to participate in the second annual Vendor Lightning Talks. Due to some miscommunication, not all potential speakers were able to participate. PPC will be working with CPC and the Board to clarify the process for identifying and communicating with representatives from the appropriate vendors for the next event.

Schedule

The schedule was developed in collaboration with the Board and CPC to accommodate the joint session with SSP, which was scheduled during the time when we would normally have pre-conferences, vendor exhibits, and the Board meeting. The committee received some feedback from the vendors regarding the limited non-compete time this year for the exhibits, which was an unfortunate consequence of the modified schedule. In 2016, we will return to the schedule as it was in 2014.

Once again, the online version of the schedule was created using Sched, and the printed edition was one of the formatted options from the website. Attendees who registered on the schedule website and selected sessions were emailed their schedule each morning.

Memorandum of Understanding (MOU)

As in previous years, PPC required all vision and preconference speakers to sign MOUs. Additionally, beginning with the 2014 conference, concurrent session speakers were required to sign an MOU. PPC included the revised author rights, and in some instances, the MOU was further edited to accommodate the requirements of some speakers.

The workflow was improved over the previous year, with the chairs dropping signed MOUs into a shared Google Drive folder to be signed by the NASIG President and then returned to the speakers. PPC recommends that the concurrent session MOU be pre-signed by the President to eliminate most of the printing and scanning and sending back and forth.

All speakers but a few last minute additions were registered by the Early Bird deadline, and there were no last-minute cancelations.

Budget

Conference Session Speaker Costs

Concurrent session speakers were offered a discounted registration rate of \$187.50 for up to three speakers per session. There were 56 speakers with the reduced rate, and the differential from the Early Bird rate was \$10,500, which was slightly lower than last year's total of \$10,675.

Workshop Costs

Workshop presenters were offered a discounted registration rate of \$187.50, two nights in the hotel, and transportation to/from the conference. The total cost for travel came to \$881.40.

Vision Speaker Costs

Vision Speakers were offered three nights in the hotel, transportation to/from the conference, and an honorarium. The total cost for travel and honorariums came to \$2,482.

Sched and ProposalSpace

The online schedule on Sched cost \$99, and the total cost for ProposalSpace was \$537.50 (\$125 activation fee plus \$7.50 per proposal accepted for review)

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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

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

Kurt Blythe

University of North Carolina, Chapel Hill
Email: kcblythe@email.unc.edu

Send inquiries concerning the NASIG organization and membership to:

Kelli Getz

Assistant Head of Acquisitions
University of Houston Libraries
4333 University Drive
Houston, TX 77204-2000
United States
Phone: 713-743-4554
Email: membership@nasig.org