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19th Annual Conference Reports, Strategy Sessions. Working Collaboratively with Vendors to Create to Products You Want: Smooth Sailing Ahead

Andrée Rathemacher
University of Rhode Island, andree@uri.edu

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PRESIDENT'S CORNER

Steve Savage, NASIG President

Well, I would have hoped that after seven years as a member of the *Newsletter* Editorial Board, I would have made dead sure that I turn in all of my president's articles by their submission deadlines. But even my first article is late, so I guess I'll just have to try to save face by saying I now understand why many of my predecessors' articles were late, too. At least now I can say that I am beginning to truly understand just how much work is required to keep such an active organization as NASIG running.

I had thought that the first few weeks after the Milwaukee conference would be a downtime. Was that ever naïve! From the Board meeting, brainstorming session, town hall meeting, many scheduled and impromptu meetings during the conference, and the ensuing NASIG-L discussion, the list of new ideas, projects, and concerns for the Board and committees to consider and possibly implement is immense—over 150 items altogether! A handful of these are very small-scale issues. Several dozen items are huge, conceptual policy or technological scenarios. The remainder fit anywhere between those two extremes.

Several task forces have been established in recent months to address some of the newer or larger-scale ideas. Charges and rosters of the groups appointed so far are included elsewhere in this issue. One new group is the Anniversary Task Force. It will recommend ways to celebrate our upcoming twentieth anniversary and will also implement adopted ideas which are not assigned to standing committees. The recently announced History Task Force is another anniversary-related activity. The Online Registration Team will implement several enhancements to make our online registration process

publisher, online content aggregator, subscription agent
4. Follow up on status of problem
5. Contact user with resolution or status
6. Keep record of problem and resolution

The third strategy is to create electronic journal management tools. The Health Sciences Library had a list of journal subscriptions in Excel, which formed the main source of data for the e-journal management team. They are currently migrating the spreadsheet data to a relational database. They are adding some license and payment information to the acquisitions module of the integrated library system and adding coverage years and content host information in the 856 field in the cataloging module. There is also a Web form template for e-journal updates, and they will be moving to real-time webpage updating.

The fourth strategy is to keep track of problem titles and frequently asked questions. This helps to anticipate potential problems and is a good source of training for new staff.

In summary, e-journal management requires effective problem solving, efficient workflows, communication with various individuals, and creative management tools. Centralizing the troubleshooting process is one efficient way of managing staff time. The creation of e-journal problem categories helps to define the workflow architecture. They are not meant to supply comprehensive lists of every type of access problem that may or may not exist. The decision to create or purchase an e-journal management system depends on your library's users, staff size, finances, technology level, and library mission. The most important factor for new staff is training.

Working Collaboratively with Vendors to Create the Products You Want: Smooth Sailing Ahead

Yvette Diven, Director of Serials Product Management, R.R. Bowker; Cathy Jones, Beta Software Manager, Sirsi
Reported by Andrée Rathemacher

Yvette Diven, Director of Serials Product Management at R.R. Bowker, and **Cathy Jones**, Beta Software Manager at Sirsi, collaborated on their presentation of how librarians can work collaboratively with vendors.

For collaboration to be successful, both libraries and vendors must benefit, and both must be willing to transcend any cultural barriers that separate them. Potential areas of collaborative product development fall under the categories of workflow (e.g. management of serials, cataloging, acquisitions), administration (e.g. collection assessment and electronic rights management), and service (e.g. tools for patrons and other end users and archiving or digitization projects).

Partners in any collaboration must make a genuine commitment of time and resources and set priorities, with the understanding that vendor resources are not inexhaustible, and librarians are busy doing their jobs. Successful products developed in collaboration must first and foremost be useful and usable. A need must be identified, and potential solutions proposed. The scope of the need must then be defined; for example, it must be decided whether the product is one that would be marketed industry-wide or if would be customized for the needs of one library. The value of the product must also be determined: How important is it? Those involved in the product development process must also keep in mind that successful products are likely to be standards-based so that they are interoperable with other products, and that the development of any new product is likely to take 15-18 months. The final step is to set a viable price in the marketplace. Vendors and librarians can work together to address all of these concerns.

Besides developing a useful product, collaboration has other benefits. Partner organizations can establish ongoing relationships, while the individuals involved get to network. In some cases, one partner can get a special status; for example, a library may be chosen to beta-test the product. Price discounts might also result from collaboration.

Since most products under development will be software, the speakers explained the five key phases of bringing a software package to market. First there is the development phase, which is where goals are stated, proposals are made, specifications are listed, and initial programming takes place. The second phase is the alpha testing phase, during which the software developer tests the performance of the software in-house. The third phase, the beta testing phase, involves customers in testing the product. During the fourth phase the product is released for sale. The fifth phase, maintenance, is ongoing, and consists of the improvement of the software through regular upgrades.

Next, the speakers outlined the vendor's goals in collaboration. Vendors hope for open communication, to develop better products that meet the needs of libraries, to provide quality, and to develop standards. Strategies for successful collaboration include commitment, being vocal, being professional, providing specific details, providing visual examples, sharing knowledge and expertise, mentioning other products, friendly reminders, updates, visits, and Web conferencing. Behaviors that do not facilitate successful collaboration would be a lack of communication, being unprofessional, not providing details, a lack of prompt feedback, being unable to work well with others, and being timid.

How can vendors and libraries interested in collaboration connect with one another? Opportunities exist through users groups, conferences, and community-wide groups such as NASIG (http://www.nasig.org), which includes vendors as active members; COUNTER (http://www.projectcounter.org), which addresses usage statistics; NISO (http://www.niso.org), which looks at standards across the industry; NFAIS (http://www.nfais.org), which is an organization of information aggregators; and through ALA (http://www.ala.org), which has a Publisher/Vendor-Library Relations Interest Group and a joint committee with the American Association of Publishers.

The speakers ended by providing examples of successful collaboration between vendors and libraries in various categories. Specifically, in the category of "pricing," there is PEAK, a project between Elsevier, the University of Michigan, and Vanderbilt University, among others. "Publishing" collaborations include the journal *Organic Letters*, a project of ACS with SPARC; BioOne, a project of AIBS, Allen Press, and SPARC; and Project Muse, a collaboration between JHU Press and the Eisenhower Library. One collaboration in the area of "standards" is SISAC, which is involved with the development of EDI initiatives. A "licensing" collaboration would be Faxon's Klibrary, a bibliographic/account management service, while an example of a collaboration on "distribution" could be in the realm of hosting, such as OhioLINK. Finally, examples of collaboration involving "archiving" would be LOCKSS, a partnership between Stanford University and several publishers, and Mellon Foundation-based efforts between Yale and Elsevier.

Faculty Collaboration in Serials Collection Development and Management: Great Visions of a Shrinking Lake

Sandyha D. Srivastava, Serials Librarian, Hofstra University; Nancy Linden, Science Librarian, University of Houston
Reported by Christie Ericson

Budget cuts have had a great impact on most serials collections over the last few years, leaving faculty and librarians struggling to cope. In this session, two librarians discussed the approaches they used to involve faculty in the serials collection review process.

Serials librarian **Sandyha Srivastava** began the session with an overview of the serials review process at Hofstra University. Faced with a diminished serials budget, major criticism over the lack of journal titles in the collection, and little response from surveys sent to faculty, the library decided to reorganize its serials review process. The first goal was to re-establish communication with departmental faculty by using the Faculty Senate Library Subcommittee to act as a go-between between the library and teaching faculty.

The dean of the library then proposed prioritizing title lists by subject discipline as opposed to the inclusive A-Z list that had been used previously. Each department was then able to prioritize its own title list and use a "zero-sum" approach to acquiring new titles. Anything gained in cuts that the department made could be applied to new titles. This method allowed the department to have more control over what titles it selected and encouraged the department to choose titles that would serve the most students or faculty.

Srivastava then went on to outline the steps involved in the revised serials review process. The new process involves the collaboration of the library dean, the serials librarian, the subject specialist, the chair of the Faculty Senate Library Subcommittee, the library liaison, and the department chair. This group then meets periodically for the purpose of balancing cuts and new additions and prioritizing new titles for the time when additional funds can be obtained.

Srivastava concluded her presentation by emphasizing the role that the Faculty Senate Library Subcommittee played in facilitating an atmosphere of trust between the library and the teaching faculty. Departments now have a greater stake in the serials collection process and increased accountability for expenditures. The opportunities for discussion have increased the level of understanding among all of the parties involved, particularly in regard to library budget limitations and departmental needs.

Science Librarian **Nancy Linden** of the University of Houston approached the serials review process from the collection development perspective. Instead of conducting an annual review of what titles should be cancelled based on budget cuts, Linden felt that a more proactive method of serials review was needed. She designed a survey for the faculty of the five departments of the School of Engineering with the question, "What journals do you use for teaching and research?" and asked that they rank their titles in some fashion. Linden made sure to emphasize that this was not a budget-driven project, that there was no deadline, and that it was not a campuswide survey.

The goals of the survey were threefold: 1) to identify "dead wood"—titles no longer needed or being used by faculty, 2) to obtain department consensus, and 3) to determine the school's priorities. Upon completion of the survey, which took about two years, it was determined