THE NASIG NEWSLETTER
The Newsletter of the North American Serials Interest Group, Inc.

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PRESIDENT'S CORNER
Beverley Geer-Butler

Greetings from Texas!!

As you know everything is big here: the land, imaginations, the cars, the egos. My grandmother used Dallas as a measure of bigness: "that mess you made in the kitchen is bigger 'n Dallas!!" she would exclaim. So Texans are accustomed to big; we expect big; we like big. Many of you, however, are not so keen on big and have expressed concern with how big the NASIG conference has gotten. So let's talk about that.

The 11th annual conference held at the University of New Mexico was our largest to date (approximately 650 registrants plus 40 guests). The preliminary evaluation report prepared by the Evaluation and Assessment Committee indicates that you were very impressed, pleased, and gratified by your experience there because 96% of the 308 evaluation forms rated the conference 4 or 5. However, among the expressions of praise and constructive criticism were scattered comments like "Conference too big -- you are a victim of your own success!" and "Limit registration -- getting too big" and "Please find a way to bring back the old NASIG -- it is too big, too busy, too crowded, too intense." This is not the first time you have expressed concern about conference size, and I am certainly not the first president to address it. In the December 1994 issue of the NASIG Newsletter, then-President
October Ivins wrote a thoughtful and informative article about conference size in which she addressed ways to bring down attendance:

1. Limit registration.

NASIG membership now stands at approximately 1100, and the Regional Councils & Membership Committee has a goal to recruit members from groups that are under-represented, such as Mexican serialists and serialists in public libraries. How do we balance the need to have a membership that represents the geographic and professional universe of serials work with a desire to go back to the good old days when the conference registration was 350?? Those of you who are willing to have your conference registrations rejected because the limit has been reached please stand up. Personally, I cannot imagine not having the pleasure of attending NASIG each year. Can you? And wouldn't you be pleased to meet a fellow serialist from Mexico or a public library at the next NASIG conference? I would.

2. Raise the price.

I can just hear the yelling and screaming now. But how many of you have had the pleasure of explaining to your institution's bursar that "Yes, that is correct. Room, board, registration, the whole shootin' match for $300.00." And there are those of you who pay your own way and are able to go to the conference most every year because it is affordable. I do not see raising the price as an option. Do you?

3. Limit registration to members only.

October sums this up nicely in her article: keeping attendance open is a good marketing tool. Each year NASIG loses a few members and then gains those numbers back, usually from the non-member group that attended the conference and saw what NASIG could offer them. Maintaining a membership of at least 1000 generates the funds needed to support basic member services such as the NASIG Newsletter, the Membership Directory and NASIGWeb. Wouldn't you miss those things if we could not afford them any longer?

Remedies to the cramped and crowded feeling to which you have alluded have been and will continue to be sought in the following areas:

- Selecting sites which can accommodate large numbers. The site selection process has changed because of the need to accommodate larger groups. In a future issue of the NASIG Newsletter, our resident expert, Jean Callaghan, will describe the process and how it has evolved.

- Offering housing alternatives such as hotels (as for me, I see an annual dorm experience as a way to make me better appreciate the generosity of my cats, Jimmie Dale and Twyla, who allow me to share their house).

- Programming and scheduling innovations, such as offering more workshops, which reduces attendance at each session.

- Arrangements for meals and social events. (Many of you commented on the convenience of the box lunches offered during lunch time at UNM.)

I do not think we can step back in time to when NASIG was smaller, and when you think about how far we have come, I hope you will say that you do not wish to go back. NASIG is known as a progressive and innovative organization, and there is nowhere for a group with such a reputation to go but forward. More thought needs to be given to meeting your needs and addressing your concerns; therefore, the Board is planning to add half a day to its fall meeting so that we can discuss NASIG's growing pains.

Thanks for listening. I welcome your comments and suggestions, so drop me a line. I'm in the book.
MINUTES OF THE NASIG EXECUTIVE BOARD MEETING

Date, Time: June 19, 1998, 8:15 a.m.-4:45 p.m.
Place: Albuquerque, NM

Attending:
J. Gammon, President
B. Carlson
B. Geer-Butler, Vice-President
E. Cook
O. Irwins, Past President
B. MacLennan
S. Davis, Secretary
K. McGrath
D. Tonkery, Treasurer
J. Tagler
J. Callaghan
M. Horn, Newsletter Editor

Incoming Board members: A. Ercelawn and C. Foster
1996 Conference Planning Committee co-chairs: F. Wilkinson and J. Griffith,
CPC vice-chair: M. Brown
1996 Program Planning Committee co-chairs: K. Cargille and C. Reinke
1997 Conference Planning Committee co-chairs: L. Ayers and T. Champagne,
and vice-chair J. Wilhelme
UKSG Chair: W. Wakeling

1. INTRODUCTION AND MINUTES

1.1 J. Gammon welcomed all attendees and introductions were made.

1.2 The minutes of January 18-19, 1996 were approved.

2. SECRETARY’S REPORT

2.1 S. Davis compiled the following list of Board decisions since the last meeting for inclusion in these minutes.

- RESPONDED to the request from the Evaluation & Assessment Committee for revisions to the 1996 conference evaluation form.

- RECEIVED an inventory of materials in the NASIG Archives from outgoing archivist, E. Rast.

- DECLINED a request for mailing labels from Haworth Press.

- APPROVED the press release announcing the birth of NASIGWeb.

- REVISED committee charges for the Membership Directory and NASIGWeb.

- COMMUNICATED with SISAC regarding a joint memorial for Fritz Schwartz. A small group of members from both organizations will meet during this conference to discuss proposals. (See Section 8)

- APPROVED the dedication of the 1996 EDI Preconference to the memory of Fritz Schwartz, but in no way diminishing the dedication of the entire Proceedings to Leigh Chatterton.

- DECLINED a request from Johns Hopkins University Press to demonstrate Project Muse at a users group session made after the deadline and which, as a marketing demonstration, was not appropriate, given the "level playing field" philosophy of the organization.

- APPROVED establishment of a general NASIG e-address (with mail forwarded to VP Susan Davis at this time).

- ADDED a member to the 1997 PPC to represent CONSER interests in anticipation of a CONSER operational meeting taking place around the 1997 conference.

- APPROVED the formation of a task force to review NASIG’s policy for reimbursement of speakers and others involved in conference or continuing education activities (see Section 6.4).
• AGREED to recommend that the Newsletter Editor and her editorial board consider the Newsletter’s focus in light of current and future electronic developments. (See Section 12.8)

• APPROVED 1997 conference theme and call for papers

2.2 B. Geer-Butler distributed a draft 1996/97 Board roster for updates and corrections to be given to C. Foster.

2.3 Professional liaisons will be meeting during the conference.

2.4 S. Davis distributed copies of the new membership brochure. J. Tenney sent a supply to UNM for the information table. S. Davis has a supply of 200 brochures, and a batch is being sent to C. Foster.

ACTION: RC&M to Investigate the feasibility and cost to incorporate the NASIGWeb address and general email address in future printings (Note: another batch is being printed with the NASIGWeb address in August)

DATE: Report at February 1997 Board meeting

2.5 S. Davis distributed a draft of a standard list of electronic publicity channels. A number of corrections were noted. A final version will be distributed with these minutes.

2.6 A number of membership inquiries were received from NASIGWeb once it was publicly announced. ECC will revise the forwarding addresses to correspond with the new officers after the conference.

3. TREASURER’S REPORT

3.1 D. Tonkery distributed a Treasurer’s report dated June 11, 1996, which showed NASIG is in a very positive cash position with record level membership, conference registrations, and slower than expected budget spending. NASIG is financially sound with a strong reserve level which is two times the annual budget.

3.2 Memberships for 1996 have reached 1,108, with 170 new members. D. Tonkery reported that the current cash balance is $288,482.40, checking—$3,981, savings—$246,821 and investment—$47,680. Most conference expenses have yet to be paid.

3.3 According to Tonkery, NASIG is well within the 1996 budget, having spent only $19,576 out of the approved budget of $59,240.

3.4 D. Tonkery reported that NASIG renewed its membership with AMSIS for $300. The Board had previously approved an expenditure of $200; however the increase to $300 was unanimously supported and approved.

3.5 D. Tonkery requested a formal motion to move NASIG’s investments from United (in Atlanta) to Charles Schwab (a nationwide investment company) with lower fees and many branch offices. Board approval is necessary for the move to comply with the legal regulations governing not-for-profit investments. It was moved, seconded, and approved.

DECISION: The Board approved the move of investment accounts from United to a no load mutual fund(s) at Charles Schwab.

4.0 1997 CONFERENCE PLANNING COMMITTEE REPORT

The 1997 PPC distributed a draft budget totaling $196,200. The University of Michigan does not provide pillows with the dorm rooms, but NASIG will be able to purchase pillows for $3.00 each. Suggested tours and activities include: Henry Ford Museum & Greenfield Village, baseball (either Detroit Tigers or minor league), and some of the many events on campus. The full committee will be appointed after this conference and assignments will be made then.

5.0 STRATEGIC PLAN

5.1 J. Gammon reviewed progress on several items in the Strategic Plan.

5.1.1 and 5.1.2 Regional Councils & Membership will absorb the following initiatives: to attract new/more members in Mexico and Canada, and to utilize artistic and marketing talents in publicizing NASIG. B. Geer-Butler has appointed a person with these talents to RC&M for 1996/97 (see also section 5.2).

ACTION: Action plan from RC&M to accomplish above objectives

DATE: October 1996 Board meeting

5.1.3 Due to overwhelming response, B. Geer-Butler was unable to appoint all those who volunteered to committees or task forces. Therefore, she compiled a list of those not
placed to forward to S. Davis, incoming Vice-President/President-Elect, to consider for future vacancies and as new initiatives arise during the coming year.

5.1.4 The Board discussed the feasibility of establishing a job placement service. There had been such a service in NASIG's early years, but was discontinued because the Newsletter was not timely enough to use for this purpose. It was suggested that NASIGWeb might be a good place for listing job openings.

DECISION: Electronic Communications Committee will investigate the feasibility of listing job openings (ONLY) on the Web

DATE: Report by October 1996 Board meeting

5.1.5 The Board discussed strategies to attract more members outside of academic libraries. J. Tagler offered to send about 10-20 letters to try to recruit more publishers. He requested that he be sent a list of current publisher members so he can better target his efforts. S. Davis will bring up the topic at the Professional Liaisons meeting. Regional Councils & Membership will be asked to develop other strategies.

ACTION: J. Tagler to send membership recruitment letters to various publishers

DATE: Late Summer/early Fall 1996

ACTION: Regional Councils & Membership to develop additional strategies to recruit members outside of academic libraries

DATE: Report by October 1996 Board meeting

5.1.6 Instructions for liaisons are already in place.

5.2 Publicity

Committees need to consult with the publicist on Regional Councils & Membership to coordinate external publicity efforts. This newly created position will prepare sample press releases, review and edit releases and announcements prepared by other committees, and coordinate publicity. The Board had discussed over e-mail some standards for preparing press releases which will be shared with committee chairs. Committees may choose to send out their own announcements to the widest possible audience, or just to NASIG members and ask the publicist to handle additional venues. Liaisons will inform current committee chairs, and in the future, the committee appointment letter will include information about the publicist position within RC&M. S. Davis will provide RC&M with a copy of the standard list of publicity channels.

ACTION: Liaisons will inform current committee chairs about the publicist position and its role and share the guidelines for preparing press releases. Contact B. MacLennan for a copy.

DATE: ASAP

6.0 TASK FORCE REPORTS

6.1 Site Selection 1998

McGill: J. Callaghan distributed a report with preliminary site information for McGill University in Montreal. Maximum auditorium capacity is 650, approximately 750 single rooms available, very few doubles. Dorms are corridor style with shared bathrooms. Many hotels are in the vicinity of campus. Conference Office staff seems competent and nice.

DECISION: Site visit will be made this summer (subsequently scheduled for Aug.5)

Vanderbilt: Based on comments from A. Ercelaw, Vanderbilt was eliminated from consideration due to concerns expressed about facilities and inadequate conference office staffing. The only viable auditorium on campus would be very expensive; another possible location for plenary sessions would be quite unsuitable.

University of California, San Diego: Local committee members would not be available in 1998, might be possible for 1999+.

Other suggestions were Rice (Houston), Southern Methodist University (Dallas), and University of Colorado, Boulder.

6.2 Program Planning Manual

Carlson distributed a June 1996 draft. O. Ivins and C. Hepfer have agreed to flesh out the outline form of the manual during July and August so the 1997 PPC could begin to use it. B. Carlson wondered if preconference planning should be incorporated. The Board agreed that preconference planning is under the purview of PPC.

DECISION: Preconference planning will be incorporated into the PPC Manual since it is under the auspices of PPC.

ACTION: C. Hepfer and O. Ivins to expand PPC manual outline

DATE: July/August 1996

Board Minutes
6.3 Conference Planning Manual

Davis had distributed a June 1996 revised manual to the 1997 CPC and members of the CPC Manual editorial board (J. Callaghan, K. McGrath and T. Mainowski). She noted that an index would be helpful. M. Horn volunteered to index both the CPC and PPC manuals. There are still several sections which need to be added, particularly for Canadian conference issues and compliance with the Americans with Disabilities Act.

ACTION: Section on Canadian issues to be developed by K. McGrath and S. Davis
DATE: October 1996 Board meeting

6.4 Task Force on Reimbursement

B. Geer-Butler will be appointing a task force to investigate all reimbursement issues relating to conference and continuing education activities. The group is to have a report for discussion at the October 1996 Board meeting, with final approval at the February 1997 meeting. (See Section 11)

DATE: Report by October 1 for discussion at October 1996 Board meeting
DECISION and DATE: Final approval at February 1997 Board meeting for implementation in 1997/98

7.0. UKSG

O. Ivins felt the Board would benefit from learning more about how the United Kingdom Serials Group operates, so she suggested J. Gammon invite W. Wakeling, Chair, to address the Board meeting since he was already scheduled to attend the conference.

He talked about a number of changes that UKSG is experiencing now. They have been sponsoring many more activities of late and decided to restructure their administration. They have a full-time Business Manager, Jill Tolson, and will be hiring two part-time administrators (30 hr./week) at an additional cost of £10-12,000. Their dues are £50 per year (approx. $75), which include a subscription to their journal Serials. UKSG is planning a £7-8 dues increase for 1997. They usually charge £185 for their annual conference (approx $280). The UKSG has 535 members, one-third of which are corporate members.

UKSG sponsors a number of continuing education "road shows" packaged for library schools. These include a packet of documentation and are generally a half-day long. In 1995, they sponsored 13, the most of any year.

W. Wakeling noted that the UKSG would be happy to facilitate visits from U.S. librarians, by arranging introductions for visiting librarians in the UK and US in an informal way. It was suggested the NASIG Professional Liaisons could coordinate and/or facilitate communication between the two groups in this regard.

8. SISAC PROPOSAL

J. Gammon noted that there would be a meeting to discuss a proposal to establish a memorial for Fritz Schwartz on Saturday morning.

9. BUSINESS MEETING PREVIEW

J. Gammon asked if there were any changes to the agenda for the Business Meeting. There will be enough chairs for the Board to sit at the dais for the meeting.

10. 1996 CONFERENCE PLANNING COMMITTEE REPORT

F. Wilkinson reviewed the materials in the conference notebook. She reported that the conference is on budget. There will be a NASIG copier available in the registration area. NASIG will be providing bottled water in Mitchell Hall, where most of the concurrent and workshop sessions will be held. She showed the Board water bottles to be provided to all registrants and the various souvenirs which will be for sale: t-shirts, tote bags, and chili pepper book marks. Several ADA (Americans with Disabilities Act) issues have been addressed for the first time. Sign language interpreters will translate all sessions where needed. The Board agreed to keep ADA purchases for this conference in NASIG's possession to use at future conferences and to add ADA compliance to the site selection criteria.

ACTION: Incorporate ADA compliance into CPC manual and site selection forms.
DATE: ASAP
F. Wilkinson noted that the preconference evaluation forms will be in the preconference packets.

S. Davis requested that all updates to the CPC manual be sent to her.

J. Griffith reported that all AV needs have been met. She requested some additional volunteers to help guard equipment that was being rented.

11. PROGRAM PLANNING COMMITTEE REPORT

K. Carpilk and C. Reinke reported that one concurrent speaker would be unable to attend due to illness, but her co-presenter would be able to fill the entire session. They will coordinate obtaining and sending speaker evaluation information to the speakers with the Evaluation & Assessment Committee.

To encourage speakers to submit their papers for the Proceedings, the Proceedings editors will inform the Treasurer of delinquent papers so expense reimbursement may be delayed as well. The Reimbursement Task Force will be asked to develop a speakers contract to explicitly state terms for the 1997 and subsequent conferences. (See Section 6.4)

ACTION: Reimbursement Task Force to develop speakers contract as their first order of business
DATE: October 1996 Board meeting for use with 1997 conference speakers

12. COMMITTEE REPORTS

12.1 Archives

J. Tagler distributed a copy of T. Mullins report. She has received and is housing all the material. She requests that anyone having material pertaining to NASIG, including photographs from conferences, be sent to her at the address in the Directory.

12.2 Bylaws

J. Tagler reported for S. Folsom that the proposal to amend the Bylaws to change the status of the Past President to an officer passed. J. Donovan will serve as chair of the committee for 1996/97.

12.3 Continuing Education

O. Ivins distributed a draft version of a serials librarianship brochure which the committee would like to publish. A May 1996 revision will be distributed with these minutes, and Board feedback is requested.

ACTION: Board feedback on brochure to B. MacLennan
DATE: September 1, 1996

The co-chairs will serve another term and expect to submit two preconference program proposals for 1997 on "Back to Basics" and "Mentoring".

The committee has had a very active year, presenting four programs, instituting a mentoring program and developing two publications and the Board expressed its appreciation.

12.4 Database & Directory

The Board congratulated the committee for producing a very handsome Membership Directory which is 20 pages larger than the 1995 edition. S. Davis reported that C. Riley will be the new chair and keeper of the database for 1996/97.

12.5 Electronic Communications

B. MacLennan distributed copies of the committee's annual report. According to the committee, 95% of NASIG members have e-mail access. The purge of non-renewals has been completed.

ECC has experienced some problems with a few e-mail accounts being dropped from NASIG-L. The committee will investigate the terms of our contract with UNC to see if we can upgrade our listproc software, which is quite old and may be causing some of these problems.

ECC will also be investigating mounting additional resources on the Web site and the future needs for a NASIG gopher. Additional committee members were added for 1996/97+ to assist with these projects.

12.6 Evaluation & Assessment

B. MacLennan requested clarification about EAC's role in the preconference. The Board asked EAC to process the evaluation forms for the preconference as well as the main conference. The committee expects to have a brief report of comments and trends from a quick review of all the evaluation forms soon after the conference to assist the 1997 CPC and PPC, whose work begins in August.
12.7 Horizon Award

J. Callaghan reported that the 1996 award was given to Reba Leiding (Rensselaer Polytechnic Institute). The Board had approved one award for 1996.

12.10 Newsletter

M. Horn noted that 1995/96 was an eventful year for the Newsletter Editorial Board, with job changes for all four editors and institutional changes for three. The Distribution Editor, V. Medaglia, moved to another state, but was able to have the printer handle mailing of the April issue. The Board discussed continuing this practice and agreed that the printer in Maine could print and mail the Newsletter for an additional cost.

Due to the advent of the NASIG Web site and gopher, the Board requested that M. Horn and the Newsletter Editorial Board examine the focus of the print Newsletter and see if there are items more appropriate for electronic-only publication.

12.9 Nominations & Elections

The Board agreed that the Nominations & Elections Committee could send and accept nomination profile forms electronically from potential candidates.

O. Ivins reported that only nine members submitted nomination forms last year. The Board will encourage more members to send in nominations.

O. Ivins presented a report from S. Murden outlining difficulties obtaining the security paper required for the ballots. The Board agreed that so long as security was maintained, the committee could consider alternative methods (colored paper, numbered ballots, signatures, etc.). In the meantime, ordering the security paper earlier will be added to the NASIG Calendar. The Board also discussed its continuing concerns about having Board representation from the commercial section.

12.10 Proceedings

12.10.1 B. Geer-Butler reported that the Proceedings Editors' Manual has been updated. The 1995 Proceedings were published in April 1996 as Serials Librarian, v.28 no.1/2 and 3/4 and as a hard bound monograph, and have been mounted on the NASIG gopher. Copies of the hard bound Proceedings, which were dedicated to the memory of Fritz Schwartz, have been forwarded to his parents.

12.10.2 One of the 1996 editors, C. Leathem (University of Miami), visited Haworth Press in May. The editors selected L. F. Williams (University of Arizona Health Sciences Center) to be the indexer of the 1996 Proceedings.

12.10.3 B. Geer-Butler reported that NASIG had been contacted by several firms regarding conference Proceedings publication and conference message board system. She will add the two publishing firms to the list for RFPs when the next bid for a Proceedings publisher is sent out. CPC will be asked to investigate the firm with the message board system.

ACTION: Add Greyden Press and Optical Archives to list of potential respondents to Proceedings publishing RFP. B. Geer-Butler will forward pertinent materials to C. Diedrichs (liaison).

ACTION: CPC to investigate the services offered by Rempe Services
DATE: Report at October 1996 Board meeting

12.11 Regional Councils & Membership

K. McGrath reported that the committee's membership had been expanded to include a European representative (J. Griffith, Harrassowitz) and a representative for Quebec (L. Murphy, McGill). The Board asked the committee to have the roster of state and provincial representatives mounted on NASIGWeb.

The committee is working on a manual and submitted a draft to the Board requesting feedback.

ACTION: Feedback on RC&M manual to B. MacLennan
DATE: September 15, 1996

12.12 Student Grant

Sixty-two applications were received this year, eight grants were awarded. Five of the eight recipients attend library schools not previously represented in the student grant winner pool.
K. Kirkland (DePaul) prepared written travel guidelines to assist the committee.

13.0 USERS GROUPS
The Board agreed to maintain the current model, with user group meetings outside the conference proper.

14.0 NASIG CALENDAR
O. Ivins will revise the current calendar this summer and pass on to B. Geer-Butler. The Board will ask ECC to consider the feasibility of mounting the calendar on the web.

DATE: Revise calendar by end of summer 1996

15. SITE SELECTION 2000
O. Ivins suggested the Board begin considering sites for the 2000 conference soon, since many groups including those which meet irregularly are planning special activities. 2000 would mark NASIG’s 15th anniversary.

ACTION: J. Gammon, O. Ivins and J. Callaghan will identify possible sites for the 2000 conference.

DATE: List at October 1996 Board meeting

16. 1996/97 LIAISON/COMMITTEE APPOINTMENTS
B. Geer-Butler distributed a roster of 1996/97 committee and liaison assignments. She was able to place 31 of 51 volunteers.

17. OTHER
B. Geer-Butler reported that M. Geller did review the article for the Serials Librarian on how serialists use electronic lists, as noted in the Jan.18-19, 1996 minutes, section 2.2.

J. Gammon thanked the outgoing Board members, B. Carlson, O. Ivins and J. Tagler and acknowledged the support and cooperation of the entire Board during her presidential year.

18. NEXT MEETING
The next meeting will be held Friday-Saturday, October 4-5, 1996 from 8:30 a.m.-6 p.m. at the University of Michigan. L. Ayers will make appropriate arrangements for accommodations and meeting room. Board members should plan to arrive the evening of October 3. PPC co-chairs will arrive on October 4.

The meeting was adjourned at 4:45 p.m.

NASIG 11TH ANNUAL CONFERENCE (1996): REPORTS
OPENING SESSION
Reported by Josephine Anemaet

Marilyn Fletcher, Newspaper Project Coordinator, University of New Mexico, opened the 11th Annual NASIG Conference with a slide presentation of the many different sights of New Mexico, the Land of Enchantment. On two large screens, images from high desert to ponderosa pine forests to river rafting to snow covered slopes were liberally interspersed with shots of the colorful balloons that fill the Albuquerque sky each October.

Julia Gammon, NASIG President, then welcomed us in English, Spanish, and Navajo. This was the largest NASIG conference yet, with 200 first-timers among the 660 people from as far away as the United Kingdom and Australia who were registered for this conference. They brought an additional 40 guests to enjoy all that New Mexico had to offer.

We were entertained next with an additional slide show and lecture by Jan Barnhart, UNM Library, on the architecture of the campus of the University of New Mexico, built in the Pueblo style. Zimmerman Library is a particularly fine example of architect John Gaw Meem’s designs. Former UNM President James Zimmerman mandated the Spanish Revival Pueblo style as the official style for the campus in the 1930s and hired Meem, who for the next quarter century designed many of UNM’s wonderful buildings. Barnhart was justifiably proud of their gorgeous library with the large murals by Kenneth Adams and the restoration of study hall, its furniture, and chandeliers.

Fran Wilkinson, Conference Planning Co-Chair, wrapped up the session with a few brief announcements about the fun run/roller blade event on Saturday and assured us that breakfast would be served at 6:30 AM. Thus began another successful NASIG Conference.
"Reinventing Journals: Reinventing Knowledge"
John M. Lienhard, Professor of Mechanical Engineering and History, University of Houston
Reported by Cheryl Riley

John Lienhard began the plenary sessions at NASIG's 11th Annual Conference with a thought-provoking exploration of the future of serial literature. Author of the National Public Radio program "Engines of Our Ingenuity," Lienhard began by answering the question, What is periodical literature?

For Lienhard, periodical literature is the early fermentation process; the place where ideas evolve, unfold, and are worked out. For an item to survive it must become a part of our metaphorical subscript. Those items that are merely functional do not survive. Lienhard used clocks to illustrate the difference between functional and metaphorical. Clocks have bells, gears, and an appearance that remains fairly static although technology has improved the accuracy of the clock. Digital clocks did not survive because the circular dial has become an analog of reality in our metaphorical subscript.

The printed book has become a metaphor unto itself. It is a metaphysical mentor. The book provides the opportunity to put aside control and give ourselves to the storyteller. Lienhard maintains we will not use electronic books as mentors, but as servants.

The computer may be attacking our metaphors. The computer has helped remove knowledge from the realm of mystery. This movement has lost the three domains of mystery: pointillism, memory, and spatial visualization. The computer can allow context to become avoidable; the computer remembers; the computer shows things we once did in our "minds eye".

The serial is only 265 years old. It is not an item you sit by the fireplace with -- it is a servant -- a mere storehouse of knowledge -- somewhere we go to find a piece of information. If the serials' place in our culture is to function as a mentor, it will survive. If it is merely a storehouse for knowledge, it will go into electronic format.

In conclusion, Lienhard noted the management of information uses complex technology. Because of our innate desire to be mentored, we must understand the metaphorical place of technology. If electronic media shapes the way we think and is the nexus of the information revolution, then the fault line is the serials literature.

PLENARY II
PUBLISHING IN THE CYBER AGE

Part 1: "The Role of the Paper-based Journal In an Era of Electronic Information"
John Cox, Managing Director, Carfax Publishing Company
Reported by Gale Teaster

Quality, good presentation, order, and copyright protection are some of the elements of publishing provided by the publisher. These ingredients combined with others offer consistency of product in paper-based journals, which is currently lacking in much of today's electronic publishing. Ready access to the Internet has contributed to a self-publishing explosion. Information can easily be exchanged without the need of intermediaries, such as, publishers and libraries. The Internet, while offering access to numerous electronic journals, creates information overload and heightens concerns related to everything from quality to copyright. John Cox presented these views, and others, as part of a publisher's perspective on the current state of electronic publishing.

Electronic publishing, in general, offers numerous advantages. Integrated text with video footage allows 3-D graphics, movement, and sound. This ability combined with the interactive capabilities of computer technology create a climate for information which is more inclusive and entertaining than its paper-based counterpart. Manipulation of complex data
tables is also possible. Binding, storage, and some production and distribution costs of paper-based material are eliminated. Searching capabilities are greatly enhanced with electronic information.

As with most technology, there are also disadvantages to electronic publishing and perceptions with which one must deal. For example, faculty are still extremely reluctant to abandon paper-based sources of information and the paper-based journals as the main authority for publication. Cox noted that in most cases, scholars consider electronic publishing to devalue a work.

Paper-based publishing has its own advantages. Paper is still the best medium for narrative text. Text on the screen is difficult to assimilate. Current computer graphics technology still can not match the quality of color reproductions in paper, nor can it accommodate mathematical and diacritical symbols. Equipment is not required for paper-based information and this reduces access costs and enables portability. According to Cox, the paper-based information source is an "enfranchising technology for everyone who can read."

Other issues to consider in comparing paper-based and electronic publishing concern support costs and licensing agreements. Technology is intrinsic to electronic publishing and this requires support costs. Patrons are still hesitant and confused when dealing with licensing agreements. Procedures and restrictions vary between producers/suppliers creating a myriad of technicalities for users, both individuals and libraries.

In considering the role of both paper-based and electronic information sources, Cox considered the role of libraries to be very important. The relationship between the publisher and the library is a dependent one. Libraries are "the custodians of the intellectual property" produced and distributed by publishers and as such are "partners of publishers in delivering published material to customers" whether paper-based or electronic. In its current state, Cox does not consider the Web a "proper publishing environment."

As their part of this dependent relationship with libraries, publishers contribute organization, layout, and readability to the material, as well as organized distribution and continuity of the product. This continuity is achieved with a clearly defined editorial scope and content through an editor and editorial board. The publisher supplies the basis of the peer review process from submission of the paper to peer review and revision. In addition, publishers supply the editorial preparation, copy editing, proof reading, publishing, marketing, distribution, archiving, and indexing of the information. The quality of the information is assured since the information is not distributed before it is officially published. Quality and continuity are important aspects of journal publication since faculty aspire to be published in the respected and premier journals in their fields.

The importance of technology to the printed source can not be overlooked. While the paper-based journal continues to look basically the same, the production and distribution of the journal has been enhanced and made more efficient through technology.

The paper journal will survive. Paper-based sources have been "astonishingly resilient." For the publisher, the process of production and distribution will become more complicated, however, involving incorporation of document delivery, full text documents, and online information vendors. Publishers will become the "custodians of intellectual properties." New publishing models will be used, for example using profiles to code, select, and send specific items required by an individual or library.

One change which should not take place as a result of electronic publishing and the increasing use of technology to access information is the abandonment of copyright. History demonstrated this fact during the French Revolution which supported the idea of free information as an absolute right of man. The result was the disappearance of quality literature. A comparable situation currently exists with Internet, which contains so much "garbage" that it is difficult to find the valuable information.

The publishing process is still needed to regulate the quality of the information. Copyright restrictions and obligations must still be regulated. Contracts and licensing agreements are needed to assure that institutions can use the information at a reasonable price. In addition to the contributions previously mentioned, publishers are in a good position to supply these regulatory functions.
While publishers must review their methodology in light of electronic publishing and its relationship to paper-based publishing, quality, good presentation, order, and the other factors mentioned previously are, and can continue to be, supplied by the publisher. Without these organizational factors, "just noise" exists.

Part 2: "From Publishing Continuum to Interactive Exchange: The Evolution of the Scholarly Communication Process"
Richard Kaser, Executive Director, National Federation of Abstracting and Information Services
Reported by Bob Persing

Kaser began by asking a series of complementary questions: Have serial publishers confused the imperative of making money with their raison d'être? Have librarians similarly confused saving money with their purpose for being? Likewise authors their need to be published, or abstracting services their need to cover the literature? Or are we all really about something else?

Kaser sees the most discussed topics in scholarly publishing today (electronic publications, copyright questions, etc.) as not causes of change, but symptoms of the changing paradigms of scholarly publishing. A review of scholarly publishing's timeline shows a system that has lived with continuous fundamental change. At first, the initial need to communicate evolved into the early scholarly publication system. Little money was involved, and the university- and state-supported system worked well — until the need to "publish or perish" developed. Commercial publishers then converted the system to a successful page charge/subscription system, based on a "value-added" model.

This value-added scholarly publishing model, which became fully-developed in the 1960s, balanced the primary publishers, the secondary publishers (abstractors and indexers), and the researchers/users. This process was never driven by supply and demand but was instead propped up by the ideals of, and subsidized through the payments of, libraries and researchers. The advent of the Internet is now causing fundamental change again, making us question if older institutions like primary publishers have outlived their usefulness.

Some of these principles "propping up" this system are also now being questioned at a national level. The Communications Decency Act's passage by Congress illustrates how much our traditional notions of information are now being questioned. Likewise, there is no guarantee that "fair use" as a concept will follow us into the electronic environment.

Meanwhile, universities are diverting more funding into other areas (administration, technology growth) and away from buying print materials for libraries. In recent years, embattled librarians have fought brilliantly against these changes but to little avail. The existing scholarly publishing system can survive only so long as its members desire to continue it. The system still is driven on the production side by the need to publish — but is now being driven by "demand" (i.e., use & citation) on the purchasing side. The academy as a whole is now saying "Everybody has to be published — but we only have to buy back the good stuff." So publication continues to grow while university and governmental support for purchasing drops. How long can this go on? How long can this system be sustained?

Kaser sees new media as giving scholars some alternatives. The "invisible college" of informal scholarly communications is another very old paradigm, actually predating scholarly publishing. The Internet has greatly enhanced this method, as well as giving scholars more options. A variety of media and methods can now be used together to enhance one another. Just having the technology does not guarantee immediate use of its full potential; paradigms must still be developed.

Kaser forecasts several factors which will drive paradigm development in the next few years: library consortia (to concentrate economic clout), growing partnerships between primary and secondary publishers (to give users one-stop access to complete information), improved security and document integrity (the idea of the "locked document"), and viable subscription models for online data provision.

Meanwhile, even newer forms of electronic communication will continue to develop. Once initial fears are overcome, some publishers will begin to innovate in information delivery forms. New Web models like interactive "villages" are prime areas for primary/secondary publisher cooperation.

Neither the academy of scholars, nor government bodies, nor the publishing com-
Community will adapt to changed paradigms overnight. Nor should we prematurely abandon any model that still serves us well. Despite all
the problems, Kaser expects a vibrant future for scholarly communication - but advises us all to "keep our eyes and ears open."

PLENARY III
PIONEERING NEW SERIALS FRONTIERS

Part 1, paper 1: "How To Fast Forward Serials to the Inevitable and the Optimal for Scholars and Scientists"
Stavan Hamad, Professor, University of Southampton, UK
Reported by Shirley Graves

Stavan Hamad suggested major roles for government to play in reference to the Internet: to ensure the Net is kept free for research, to subsidize global electronic preprint archives in all learned disciplines, to extend all research grant support to mandate and cover the page costs of the publication of research findings in refereed electronic journals, and to support electronic refereed publications which pursue the inclusion of research.

In his arguments supporting the roles for government, Hamad advised that distinction needs to be drawn between trade and non-trade publications. If an author writes with the intent of selling the end product and if a potential market exists to buy the publication, the trade category is implied. By contrast, if the author's purpose is solely to disseminate information, the non-trade classification is appropriate. In the latter, it is not unusual for the writer to cover personally the costs of reproduction and distribution. In the non-trade category, Hamad saw the government in a unique position to lead and accelerate the process of dissemination, especially in the areas of research monographs and conference proceedings. He further discerned individual articles as complete units, not parts of a larger whole.

The goal of the scientist and scholar is publication; this objective has been ill served in the past by the paper medium because of the cost and the slow, inefficient dissemination process. Electronic publication provides an alternative, but it is not without reservations: that the complimentary status of the Net will eventually be subjected to a pricing system, that pre-publication will influence the acceptance of the article by a refereed journal, that the author will not receive due credit, that the opportunity for plagiarism will be heightened, that an electronic format is less prestigious than paper.

For each issue, Hamad offered a remedy. In addition, he advised that an author can archive the preprint version on the Net and then replace it with the published version after refereeing and acceptance by a print publisher.

Hamad concluded that, if government does not support electronic publishing, it will happen anyway; it is only a matter of time with the lapse determined by human nature.

Part 1, paper 2: "Winners and Losers in the Global Research Village"
Paul Ginsparg, Physics Research Staff, Los Alamos National Laboratory
Reported by Virginia A. Rumph

Ginsparg began by taking issue with a previous plenary speaker who maintained that the future of scholarly publishing will greatly resemble the present, with the current publishing structure being perpetuated in the future. The reality could be very different. To date, there has not been much input from authors or readers in the discussion of how scholarly publishing should evolve. Typically the researcher participates in all stages of the scholarly process, and knows them all very well. How long do researchers have to wait for publishers to catch up, Ginsparg asks? He is frustrated that academic administrators have not supported authors' endeavors in electronic publishing but have been distracted by other concerns.

Ginsparg related a brief history of academic computer use beginning with the enthusiastic adoption of e-mail to allow almost instantaneous communication in the early/mid 1980's. The switch from paper to the standardized word processor allowed research to be transmitted back and forth electronically - a great boon. The physics community started the precursor of the World Wide Web, using it freely and widely.

Ginsparg next outlined what the researcher wants but cannot get in the print realm. Start with a hot topic; do a keyword search in context; get an overview of the subject from a literature search with the value-added feature of a ranking of the most important papers and why, including
retroactive context (this led to this, etc.); and a discussion thread/commentary. Also, since research is becoming very compartmentalized, a quality analysis of related fields is necessary, too. This added value cannot be automated; neither can peer review.

Currently, the publisher provides the stamp of quality/respectability to research. However, the publisher does not create this quality, but merely organizes it from material provided by the research community.

Ginsparg then showed an HTTP server usage chart plotting a subset of total activity on the World Wide Web from one machine at Los Alamos for January 1994 to May 1995—usage is going up very fast. The Automated Physics E-Preprint Archive (http://ocn.lanl.gov/) was started in summer 1991 for researchers in a small sub-sub field of physics (100 members) to electronically mail submissions after it was decided that paper preprints were not timely enough to reach all members of the group, especially the foreign researchers. The economics of electronic preprints are compelling as costs continue to go down rapidly. Also, since everyone is equal on the Web, younger and third world researchers are treated fairly. There were 13,000 submissions in 1995, with 20,000 projected for 1996. Ginsparg showed another chart which was a snapshot of requests for papers during one week in May 1996. Since only 26% of the requests were for older papers, the demand obviously exists for archived material as well as for current research.

Conventional scholarly publishers have a stake in claiming electronic publishing is difficult, expensive, and a bad idea. Government funding, through paying page charges, would keep these publishers honest. According to Ginsparg, the actual amount of published material per researcher has gone down slightly in the past 20 years. The explosive growth comes from increased funding, the general population increase, and the increase in the number of researchers. The result is too much research for anyone to read.

For Ginsparg, the real issues in scholarly publishing start with a peer review process that is not a stringent enough filter. When everything is available in preprint, peer review could be more selective, resulting in a higher quality final product. The advent of large scale commercial involvement has created the short-term problem of crowding research out of the transmission pipeline. If a distributed set of mirrored nodes are created as local distribution points the transmission problem should be overcome. A collaboration of scientists, researchers, and librarians is necessary to improve the current distribution process. Long-term archival stability is also a real issue. We don't know yet who will play the role of translating data from dying formats to new formats, but this is an obvious arena for librarians. Finding information is also the purview of archivists and librarians. Currently, we must rely on horrible robotic searchers/indexers that actually damage the servers. Future librarians need to concentrate on creating workable finding and indexing aids.

Ginsparg ended by calling on us to disentangle distribution issues from content issues through a collaboration between researchers and the librarians who have supported their research.

Part 2: "The Serials Revolution: A Call for Vision, Innovation and Tradition"
James Neal, Sheridan Director, Milton Eisenhower Library, Johns Hopkins University
Reported by Ladd Brown

"Are we seeing a change in the weather or a change in the climate?" asked James Neal in the capstone presentation. Using rapid and broad strokes, much like the late Bob Ross on PBS' "Joy of Painting," Neal painted an overarching picture of what serialists may see in the not-so-distant future.

Neal began by pointing out a dozen of what he called societal developments and trends which affect scholarly information. Among these were the personal computer revolution, the Internet revolution, the values revolution, and the knowledge worker revolution. His mention of the "MTV revolution" made reference to the popularity of graphics and interactivity in electronic environments.

An interesting consonant combination came about when Neal was talking about the virtual library. He added the terms virtuoso library (where expertise and resources are emphasized) and virtuous library (when terms such as commitment and partnership figure into the mix).

Next, Neal talked about technology, naturally centering on network growth and development. He expounded on automation's affect on all aspects of scholarly activity, including the lifestyles of those involved in its production or propagation. He said that those involved in the
The information value chain was Neal's next topic and he explained the functions of the so-called chain. His description of the "actors" in the chain were: creators (authors), sellers (publishers), intermediaries, buyers (libraries), and users (readers). Neal then elaborated on cooperative models involving publishers, academics, and consortiums.

Neal concluded his talk with a description of Project Muse, a project of Johns Hopkins University.

**NASIG 11th Annual Conference (1996): Reports Concurrent Sessions**

**Concurrent 1**

**Electronic Serials Cataloging: Now That We're Here, What Do We Do?**

Reported by Pat Frade

Many aspects of electronic serials cataloging have not yet developed standard practices, or are still in transition. This panel discussion included Bill Anderson (CONSER Specialist, Library of Congress), Leslie O'Brien (Head of Technical Services, Virginia Tech), Steven Shadle (Serials Cataloger, University of Washington), and Thomas Champagne (Serial Electronic Resources Librarian, University of Michigan). Bill Anderson first presented current CONSER policy on each topic and then the other panelists presented specific examples.

The first topic of discussion was the access and location information (538/856 fields). The 856 field has (1) repeatability for standard mode of access, (2) completeness, (3) level of access, and (4) form (subfield u). The 538 field starts with the mode of access, which can include an e-mail address and subscription information. This field also records general information.

At the University of Washington, which has 25 databases, a cataloger catalogs a record in the MARC format, then transfers the record to a BRS system, Netscape environment. The 538 doesn't display on the brief screen, so the information is put in another note field. If the serial appears to have complete holdings, the note is added, but holdings are not maintained. A call number with the cutter <Internet> is added for a subject browse search. Washington is also doing a pilot test to determine the rate of title changes, holdings changes, etc.

Virginia Tech began cataloging electronic resources in 1991. The first titles cataloged were those that had a subscription fee. Holdings were downloaded to the mainframe for archival purposes (this procedure of archiving is no longer done). Virginia Tech is a VULS site; there is no hypertext link. They do not note all mode of access sites. They also do not use a system requirement note (538 field) because the title is on the Internet.

The University of Michigan (a NOTIS user) has 150 titles since 1990. These records are independent of their serials records. They provide information on access only — no holdings information. Michigan verifies site information on a weekly basis — both manually and electronically. They have created a web document where the cataloging staff can click on each site; there they find 2 to 5 changes per week. After discussing the archival issue versus the technical services work issue, they decided not to archive holdings.

The second topic of discussion was on file formats, digital conversions of print, and multiple versions. CONSER policy is a single record for a serial which has different file formats. The Library of Congress also has one record to represent all formats. A 516 note field is used for a different version note, and 530 and 776 note fields indicate other physical formats.

The discussion next focused on computer file characteristics information which is found in the fixed field elements of serial 006 field and the computer file 007 and 008 fields. A 516 note can include file characteristics, format, genre, etc. CONSER recommends not using a 256 field even though it is supported by UMSARC bibliographic. ISBD revision is under review.
Margaret Rioux, Information Systems Librarian, MBL/WHOI Library
Reported by Beth Holley

Margaret A. Rioux addressed how to identify information resources for selecting and collecting virtual resources. The development and management of an Internet-based collection is a challenging new frontier for serialists. Rioux described the Internet as chaos and quoted Michael Gorman as saying that “The Net is like a huge vandalized library ...”

Libraries are quickly becoming more than just warehouses of the printed word and must change to utilize the latest forms of information technology. Rioux emphasized that the basic principles of collection development will work when applied to Internet resources and that collection development policies should include the Internet and other electronic resources.

Traditional factors that still need to be considered when selecting electronic resources include quality and content, relevancy, ease of use, reliability, cost, and copyright. Medium specific criteria for selection, such as hardware/software requirements, format, functionality, archives, and method of access will also need to be considered. Other important issues include relative cost and delivery mechanism, longevity of the resource, and origin and integrity of the source.

Rioux then identified ways of locating online resources. Electronic directories (e.g. Yahoo), search services (e.g. Alta Vista) and mailing lists (e.g. NewJour) all serve as reference tools similar to Books-in-Print. Also, reviews of electronic resources are beginning to appear in journals such as American Libraries and Library Journal, and are available online through such projects as Infofilter.

Rioux’s final advice was to build and maintain an electronic collection by applying traditional principles and the unique criteria associated with electronic media along with common sense and professional judgment. Hunting and gathering in cyberspace is a new and challenging adventure that will assist libraries in providing patrons with the best information available, regardless of format.

Part 2: “Keeping the Jello-Nailed to the Wall: Maintaining and Managing the Virtual Collection”
Betty Landesman, Systems Planning Coordinator, George Washington University
Reported by Marcella Lesher

Betty Landesman introduced the next logical step to the hunting and gathering skills discussed by Rioux. She suggested that once electronic resources have been gathered they need to be cataloged. Through careful selection and cataloging of these resources, librarians can add elements of quality such as controlled vocabulary search terms as provided in the cataloging of print resources. Landesman discussed the issues surrounding whether a catalog should only consist of items physically present in the library. She suggested that the catalog is more than just a compilation of library “owned” titles. As a finding aid, the library catalog should be used to point users to the wide variety of items that library selectors think their patrons will want to see. Web sites and e-journals can be evaluated and selected in much the same way that print media is evaluated and selected and then incorporated into the library’s catalog.

Landesman discussed some of the practicalities of incorporating electronic resources into the catalog, citing the CIC Electronic Journals Collection (http://ejournals.cic.net/) and OCLC’s InterCat project (http://www.oclc.org:6900/) as two examples of projects undertaking the cataloging of electronic journals and other resources. Cataloging guides are also available. Format integration and the use of the 856 field, which can be used to note method of access to electronic resources, are two specific areas which can assist catalogers in record creation. Noting differences in how libraries may wish to detail their holdings, she provided several examples of cataloging records with holdings statements from different library settings.
Landesman concluded by talking about some of the issues and problems that will be faced as libraries undertake the cataloging of electronic resources such as staffing, claiming, link maintenance, hardware needs, and time and space issues surrounding the archiving of electronic material.

CONCURRENT 3

ELECTRONIC PHYSICS LITERATURE AT THE FOREFRONT OF CHANGE
Reported by Vivian Bernstein

The scientific community is a logical hotbed for the application of new technologies designed to efficiently disseminate information to researchers and practitioners worldwide. In this session, representatives from both the Institute of Physics (UK) and the American Physical Society discussed their strategies and experiences moving into the new electronic environment. Both speakers emphasized the mandate to provide access into the world of physics, and to provide some additional value in their electronic product development that enhances existing print and traditional formats.

Alan Singleton, Director, Institute of Physics Publishing, comes from a broad background of industrial physics, librarianship and publishing. In his presentation, "The Electronic Journal Program of the Institute of Physics," he described the process begun in 1994 whereby IOP pioneered one of the first full-text on-line physics journals: Classical and Quantum Gravity. All 3 platforms were introduced simultaneously: listserv, gopher, and the Web. Within several months, the Web dominated in popularity and remains the principal platform for new IOP products and services. In 1995, Physics Express Letters was brought on-line with much success. Today all IOP journals are available in electronic format.

In early 1996, extensive surveys, focus groups and standing councils were used to capture user preferences and reactions to new formats. Data indicated that the features most critical to the user are: searchability of abstracts, ability to print locally, t.o.c. browsing, and full peer review. Video, color, simulations, and multimedia are far less critical at this time.

Today the enhancements continue. The Web site is being redesigned to be easier and cleaner, and to include more features: placement, white pages, conferences, continuing education. Home pages are available for each journal and include t.o.c. and a "featured paper". Soon the user will be able to configure her own main menu and pre-select specific journals, set bookmarks, and keep personal notes. A journal alerting service is due to launch this summer. Two or three journals are being considered for a multimedia component, and there is interest in incremental publishing of infrequent journals. Perhaps most interesting is the development of citation capabilities: self-cites (other IOP journals); inter-cites (non-IOP journals) and future-cites (links back to text in more recent papers). The most pressing issues for the library audience were those surrounding passwords and site licenses—many questions after the presentation reflected this concern.

Constructing a segue for the second speaker, Singleton mused at the nature of the scientific journal. Commercially, the entity "journal" is an end-product, with emphasis on the creation of the product. Within the scientific community one hopes to "see the process of science recorded." The journal (and supporting database) is many-faceted and capable of fragmenting and recreating itself. It is an expression of the community while both differentiating and linking it to other communities.

The second speaker was Robert Kelly, Director, Journal Information Systems, American Physical Society. His presentation was entitled "Digital Archiving in the Physics Literature." Kelly presented a model which re-engineers the entire process of journal publishing from author to reader to archive. One of his key points is that we must not neglect the archival integrity of the literature as we engage in scientific journal publishing. He proposes that we expand our focus from simply printing articles to the larger view of archiving and distributing physics information. He believes that we can facilitate the author to reader process via cost reductions and improved cycle time. Further, production practices should be redesigned in anticipation of new technologies. Re-engineering should include pre-print/development, editorial/peer review, and actual publishing/archiving.
Much of the proposed innovations are Web-based. Editorial functions and peer review can be managed electronically, accepted articles should be converted to SGML and archived. APS has prototyped a new e-print server accessible via their home page which provides for multiple formats: pdf, txt, ps. An "authoring" enhancement is proposed in the future which would include RevTex, WP templates and a Paper Creation Wizard. In summary, APS is proposing the "long view" and pursuing full electronic infrastructure. The physics community will be positioned to avail itself of technological innovation in information systems and is truly "at the forefront of change."

**CONCURRENT 4**

**ISSUES IN ELECTRONIC LICENSING**

Part 1: "Navigating the Electronic River: Electronic Product Licensing and Contracts"

Nancy L. Buchanan, Coordinator of Electronic Resources, University of Houston Libraries

Reported by Nancy Newsome

Buchanan guided the audience through what she has learned with a practical, step-by-step approach to her presentation. She provided the audience with useful information and advice based on her own experiences.

The process of negotiating a licensing agreement or contract for an electronic product begins when you think you might be interested in the product. Ask questions early and look at the conditions in the contract even before you review the product in a trial situation. Talk to an actual sales representative rather than someone at a general 800 number. Be honest from the beginning about anything that might keep you from buying the product.

Some contracts are enforceable even without signing them, such as situations where there is a label stating that by opening the package you are agreeing to the terms of the license agreement (although someone in the audience questioned the legality of this). Some contracts are permanent whereas others are renewed periodically. Those that are renewed can often be different upon renewal from the original. For this reason, renewal contracts should be read very carefully and may have to be renegotiated. Vendors often change the terms of contracts on a regular basis by sending out notices packaged with the physical product. (The legality of this was also questioned by someone in the audience.) Receipt and check-in personnel should be alerted to watch for these and route them to the appropriate person. The bottom line here was that you should READ YOUR CONTRACTS very carefully, especially the definitions section. Definitions of terms can vary dramatically from one vendor to another; for example, there are many very different definitions of the word "site."

Clauses in contracts and licensing agreements and how they are used by different vendors can also be problematic. In particular, those such as "legitimate use" and "authorized user" can mean different things to different vendors. How users are counted and how workstations are counted can be handled differently among vendors. Some vendors give you the option of buying a particular number of uses. Also be careful of what is meant by locations. Often there are limits placed on remote access. There may be an extra cost for remote access. Be certain that whatever security is provided is acceptable to you. The terms of payment should also be given careful consideration.

Buchanan concluded that the key to successful negotiating is to be able to explain to a vendor why something in the contract will not work. In her experience, if you can do that, you will be able to reach an agreement. Then be sure you get a copy of the signed agreement and that any subsequent changes are put in writing. One last consideration is whether the vendor is also the producer. Buchanan's experience has taught her that the worst of all possible worlds is to go through a vendor who is not the producer.

The question and answer period following Buchanan's remarks brought out a couple of additional important points. Before you sign a contract, make sure that you have the authorization from your institution to do so. You should also make sure that the sales representative you are working with has the authority to incorporate any agreed upon changes into the contract and get those changes in writing for your own protection.
Part 2: “Site Licenses: A New Economic Program”
Rene Olivieri, Blackwell Publishers
Reported by Cathy Tijerino

In his opening statement, Rene Olivieri announced that as he worked on his presentation, the context of the lecture had evolved from what was originally printed in the program to “Site Licenses: A New Economic Program.” Thus the topic of site licenses was presented in a larger context instead of the initial focus on academic research.

Olivieri began by saying that although there are some problems with the use of site licenses, the difficulties tend to be legal and commercial, not technical. One of the most vexing issues affecting site licenses is copyright laws which constantly change and vary from country to country. According to Olivieri, governments are continuously re-examining copyright laws not because of library related concerns, but due to economic concerns of the entertainment business and the tax dollars it generates.

Olivieri displayed several overheads which depicted a model of the publishing world in which buying fewer titles leads to a price increase in journal titles and a traditional economic model which demonstrates that a price decrease causes higher demand.

Next, Olivieri described some of the costs of publishing print journals versus electronic journals. He explained that electronic journals have a higher origination costs than print, but the marginal costs are much lower because electronic journals do not need paper, binding, or printing. Then he listed some of the benefits of site licenses. Site licenses empower the buyer by providing more freedom with usage and require only a single transaction as opposed to the vendor monitoring usage of the products. In addition, site licenses also seem to provide more fairness in that libraries pay for numbers of users, allowing smaller libraries to pay less. Relative to standardizing the process, he described an experiment in Great Britain that will test a national site license and hopefully resolve some lingering questions, such as: Will libraries buy more journals? and Will the journals be used more often?

Olivieri closed his presentation by saying that site licenses will become more prevalent. For example, site licensing contracts are more practical for libraries, and vendors and customers want contracts. There is also an advantage to publishers to have more readers, as more readers should result in more citations from their journals and better submissions for publishing. In conclusion, “site licenses are not a panacea,” and Olivieri predicts a mixed economy of site licenses and document delivery.

CONCURRENT 5
THE CIC ELECTRONIC JOURNALS COLLECTION PROJECT

Bonnie MacEwan, Collection Development Coordinator, Penn State University Libraries;
Mira Geffner, Project Manager, CIC Electronic Journals Collection, CICNet, Inc.
Reported by Arney Park

Bonnie MacEwan presented the paper; Mira Geffner was ill.

The Electronic Journal Collection (EJC) was developed when CIC Library Directors initiated the investigation of the management and use of shared electronic resources. Key areas identified in developing the collection were collection management, selecting an interface (WWW), cataloging, publisher contact, and approval before the journal is listed, and archiving. Subject, title, and keyword searching are allowed, as well as the ability to view the titles alphabetically or by subject. Bibliographic records include weekly-updated hot links to the journal. While all journals are currently free, the CIC plans to work with publishers and authors on issues concerning paid subscription titles. Other future plans are to run a persistent URL server to maintain consistent URLs.
When a journal is requested for inclusion, CIC and a formal proposal is put forth. An Electronic Resources Officer appointed at each library processes the local review of each proposal. Six CIC universities are cataloging EJC journals, with records contributed to OCLC and OPACs. Cataloging expertise is shared among CIC libraries. A full archive of all titles in the collection is stored on disk and backed up to tape weekly.

A prototype system with 49 journals is available at http://ejournals.cic.net. A large initial investment was required to work out issues involved colleagues are surveyed for interest in the title in the development of the project. Descriptions of working groups and their reports can be found at http://cedar.cic.net/cic. Initial technical documentation is available at http://ejournals.cic.net/ej.doc.html.

Benefits gained by cooperative efforts in electronic journal management include access to resources, experimentation with the acquisition and distribution of resources, helping to shape the future of scholarly communication, and potential use of the collection by other libraries.

CONCURRENT 6
THE GREAT DEBATE OVER COPYRIGHT IN THE ELECTRONIC ENVIRONMENT
Reported by Jodith Janes

"Electronic Publishing is Not Print Publishing – How Publishers and Librarians Assess the Differences"
Carol A. Risher, Vice President for Copyright and New Technology, Association of American Publishers

With the many advances in information delivery and education methods, we are living in an incredible transition period and are having to invent ourselves on the fly. The advent of network delivery systems makes possible information on demand. The information thus delivered has targeted content and arrives on one's desktop. Publishers are finding that technology allows very different kinds of access than does print. However, because not all computer equipment is capable of receiving all types of information, publishers are having to maintain double or parallel organization structures in order to provide various types of access.

The doctrine of "fair use" still applies in the digital environment. Meetings over the past two years have focused on specific guidelines for specific projects including distance learning projects, collections of images, and digital books/serials. In the digital environment where the question of "fair use" can involve a piece of information there is a great deal of difficulty in documenting exactly what constitutes "fair use." Just as the music and film industries have developed special kinds of licensing arrangements as shifts in business models have taken place, so might it be that publishing will develop something similar. Digitized image archives with licensing of "on demand" could be a solution. For example a teacher might scan a photograph for a class project -- the first use of this photograph would not incur any fee, but if the same photograph were to be used as an ongoing part of the class, each subsequent use would require permission.

Interlibrary loan is a difficult area especially in light of digital delivery of digital information. Electronic reserves are an especially difficult scenario and are not "fair use." However, negotiations are continuing as publishers, librarians, and users discuss new patterns and practices to ensure access and fair use.

"What Libraries and Educational Institutions Seek in the Electronic Environment"
Laura N. Gassaway, Director of the Law Library and Professor of Law, University of North Carolina, Chapel Hill

The current law maintains a perverse balance — while protecting authors, publishers, and producers, it also assures public access to materials. Libraries are the voice of the public and need to preserve browsing, assure the right to read, and allow wide use and accessibility to materials for the poor and have-nots. There are inherent in the copyright law competing interests: publishers and producers wish to maximize profits and stay viable, while libraries believe that they are representatives of the public and allow multiple use of materials. Libraries cannot stand by and see fair use become nothing more that a license issue.

Changes during the progression from "Green Paper" to "White Paper" have changed expectations and revealed a slant towards commercialization. Gassaway then went on to
discuss changes in wording and potential implications of the new law. She argues that "fair use" character should not be negated simply because information is transmitted to someone else. With a digital work is each copy a new work? If so, then does the first sale doctrine apply? However, if the library buys a copy, then transmits that copy to someone, and deletes its copy, then only one copy remains.

While we accept that electronic information is different from traditional forms, new guidelines can be based on existing guidelines for print media. Suggestions for handling electronic reserves must be acceptable to all parties and will entail costs on both sides. Instructors will have to be educated about lawfully obtained copies and other aspects of copyright compliance. One solution might be to allow digitization for use only, with access limited to class participants, then if the material was to be used again, seek permission and pay copyright fees for next and subsequent usage. There is a need to educate the public about copyright.

CONCURRENT 7
PARTNERSHIPS: HOW MANY FORMS, HOW MANY ISSUES?

Part 1: "Digital Library Partnerships: The Issues and Challenges"
Jacqueline H. Trolley, Manager, Corporate Communication, Institute for Scientific Information
Reported by Valerie Bross

This session offered insights into shared development of electronic resources from the perspectives of corporate and library partners.

Jacqueline Trolley began with an overview, explaining why the partnership approach has developed and what the issues are. The partnership approach has gained favor because technology investments are costly. Partners may include technology companies, single publishers, groups of publishers, societies, agents, utilities, and libraries. Successful partnership requires a shared vision, mission, or goal. Other important ingredients for success are flexibility and good communications among the partners.

To illustrate a partnership, Trolley introduced ISI's Electronic Library Project. This corporate partnership combines the publishing skills of ISI with the technical expertise of several companies and with the journal content of 120 publishers. The Electronic Library Project will provide access to 500 journals online — one third of the journals in ISI's Current Contents publications. ISI intends to beta test the Electronic Library Project at six sites, one of which is Scott Memorial Library.

Part 2: "A Medical University Library's Partnership to Provide Electronic Access to Life-Science Serials — Philosophy and Issues"
Paula M. Lynch, Collection Management Librarian, Scott Memorial Library, Thomas Jefferson University
Reported by Valerie Bross

Next, Paula Lynch described how Scott Memorial Library (SML) evaluated ISI's Electronic Library Project to determine whether to offer it and how to introduce it to users. SML supports the research needs of the faculty and students at the university, as well as the needs of various off-site research groups and medical facilities. To meet the demands of these users, SML evaluated the ISI product for potential use as a source of document images of journal articles.

The Collection Development Dept. used five criteria to evaluate the Project: (1) interlibrary loan/document delivery data; (2) circulation statistics; (3) cost per use; (4) local faculty involvement in the publication; and (5) correspondence between ISI titles and the Brandon-Hill lists of pertinent resources for small medical libraries. Criterion (4) proved too restrictive; this was later dropped. In the end, the library identified 200 titles to match against the titles in the ISI project. Only 40 of the 200 titles on the library's selection list matched the ISI titles. However, the library has decided to continue with the test. The library intends to first make the ISI Electronic Library available from the Reference area and eventually extend the service to remote users.
William J. Kara, Acquisitions Librarian, Albert R. Mann Library, Cornell University
Reported by Carol MacAdam

The Albert R. Mann Library at Cornell University specializes in providing information in agriculture, life sciences, and human ecology. The library offers an online collection of electronic resources accessed via gateway by users anywhere on campus. This collection includes more than 500 titles; when the library wanted to expand the collection they looked to the USDA for material to add. USDA economic agencies collect data and publish reports on such subjects as field crops, specialty agriculture, and farm sector economics. Approximately 300 USDA titles are available in electronic form. Some are statistics needing spreadsheet treatment; some are serials; some are very small; some are esoteric (poultry, slaughter, catfish processing).

Mann Library and USDA began a partnership in 1992/93, finding a shared goal in the desire to provide the widest possible access to a core collection in agriculture. In this partnership, the USDA provided the publications and some start-up money and served as the authority on the content of the reports. Mann Library developed and provided gateway access, the organization of the material, and user support (e.g. help documentation and access information). All 300 titles are fully cataloged in the Mann Library catalog. Incoming reports are processed by acquisition staff who post them to the database within 5-10 minutes of receipt. Staff verify acquisition, rename and reload reports into the system, and make backup copies. Library users can subscribe directly to some titles or access the library database via World Wide Web, file transfer protocol (ftp), or gopher. Currently 1865 users hold 10,000 subscriptions via an automated mailing list with reports delivered to E-mail addresses. Because the reports are public domain, access is free and open to all users.

This partnership may provide a model for depository libraries in the new era when all government documents will be available online. Kara cautions that availability can be automated to a large extent, but there is still the need for the library to maintain organization of the information and quality control, ensuring that the correct report is received, posted to the correct file, and that transmission is complete and correct.

NASIG 11th ANNUAL CONFERENCE (1996): REPORTS
PRECONFERENCES

PRECONFERENCE 1:
EDI & RELATED STANDARDS: A PRIMER & UPDATE FROM THE FRONTIER

Part 1
Reported by Beth Weston

Tina Feick, Sales Manager, North America, Periodicals Division, B. H. Blackwell, opened the program with an "EDI Overview." She defined EDI (Electronic Data Interchange) as "the exchange of commercially oriented information in standard electronic formats, between systems, and without human intervention or interpretation." She stressed that EDI is a form of electronic commerce. It is not electronic mail; it is not MARC; it is not Z39.50; and it is not bibliographic information. The benefits of EDI for libraries include: increased accuracy, reduced postage and paper costs, and faster service. EDI can handle routine transactions, allowing staff to focus on complex transactions which require special attention.

EDI requires a system that allows data to be extracted. The data must then be translated into a standard and sent to a trading partner that is willing and able to receive the data. The EDI standards available are ANSI ASC X12 (American National Standards Institute Accredited Standards Committee X12) in the U.S. and EDIFACT (Electronic Data Interchange for Administration, Commerce, and Transport) in Europe. Feick reported that SISAC (Serials Industry Systems Advisory Committee) has tested, approved and published standards for
several transaction sets, including claims (869), claim responses (870), invoices (810), and dispatch (655), and that several other sets are under development. Felck also discussed translation software, which for libraries, may be determined by the local automation system. Another factor is the communication mode, which may be by a value-added network or the Internet.

One challenge is developing links for machines to talk to each other. Many automation systems don't have fields to hold data required by the X12 standard. If the appropriate linking fields don't exist then the receiver must manually input the transaction. How do we move forward? Librarians must sell the benefits of EDI to management; include a requirement for EDI in all RFPs; participate in SISAC; set EDI as a priority in user's groups; and create output files outside the local automation system.

James Heusmann, Head, Technical & Automated Services, Linda Hall Library, followed next with "EDI & the Library." Heusmann defined EDI as any information that is exchanged without being re-keyed, whether or not it utilizes the X12 standard. In this definition, the Linda Hall Library is currently utilizing EDI for X12 claims, BISAC ordering, SISAC barcode check-in, and importing and exporting bibliographic and authority records. Possible future paths include implementing EDI for invoicing, using X12, claim responses, receiving PromptCat bibliographic records, interlibrary loan and document delivery transaction, interfacing with their business office, and interfacing with a bank for exchange rate transfers. System vendors are trading partners; therefore, even though libraries don't exchange data with these vendors, it is important for libraries to convey their priorities for EDI development. Libraries must think about what functionality the market will support so that it will be worthwhile for vendors to develop. Libraries want information to and from vendors an publishers, bibliographic utilities, systems vendors, financial institutions, and document delivery services to be exchanged without manipulation.

Stephen Dane, Vice-President and General Manager, Kluwer Academic Publishers, provided a publisher's perspective on EDI implementation in "EDI & the Publisher." He identified the use of dispatch data to reduce claims as the largest benefit of EDI to publishers. Kluwer worked with a subscription agent to analyze claims. Of the claims tracked in the project, 40.2% were answered by the agent using an online dispatch file, 40.7% were answered by the agent using a printed dispatch list. 14.8% were forwarded to Kluwer, and 2.5% were returned to customers. Dane stated that more publisher participation is needed for successful EDI implementation in the industry. However, many publishers and agents are in the midst of major system changes or have other priorities, such as electronic publishing. There is also a need for more awareness of EDI. Another factor is that the various trading partners are all waiting for each other to comply with the EDI requirements.

Part 2
Reported by Jenni Wilson

Sandra Hurd, Director of Library Automation, EBSCO Information Services, and the 1996-1997 Chair of SISAC, spoke about EDI from a vendor's perspective in "EDI & the Serials Vendor." She guided us with humor through a typical business cycle, from request for quotation to remittance advice and outlined the X12.810 invoice and the X12.889 claims data fields that are required to achieve a complete EDI transaction. She also asked the question, "Why bother?" The final analysis was that we can allow machines to do the work for us; the service is faster and more accurate; it's secure and reliable; records are updated electronically; the economies of scale lead to lower costs; and partnerships produce results. Hurd distributed a very useful Automation Update from EBSCO title EDI and X12: A Primer and also a copy of the latest issue of SISAC News.

Ted Koppel, Information Systems Manager from the UnCover Company spoke about "EDI and Related Standards." He talked first about the early stages (1991) of Z39.58 and its goals: to be short but bibliographically unique; to cover the broadest possible number of published serials; and to be derivable from the citation of source document, not externally assigned or derived. He then moved on to talk about the 1996 enhancements to Z39.58 which include: a defined internal structure of SICI (Serial Item and Contribution Identifier) to three distinct segments (item, contribution, and control); defined specific external structure types to identify serial item versus serial contribution (journal versus article); storage of distribution medium; refinements on identifying derivative parts of contribution (t.o.c., index, etc.); significant changes to title code algorithm; revised rules for mandatory versus optional fields; and punctuation and housekeeping.
There was further, more technical discussion of enhancements to the Code Structure Identifier (CSI-1, 2, 3), which allows identification of the item, contribution and the control segments in the SICI data string.

Sandy Westal, Vice-President and Director of Reference Databases, Innovative Interfaces, Inc., spoke to us about "EDI & the Integrated Library System." Westal talked individually about issues in development and implementation of EDI programs for an ILS system vendor: 1) product design — purpose of the interface, record formats, structure, does data transfer in or out of the system, and telecommunication; 2) development — dynamics of three-party development among ILS vendor, library, and subscription agent; 3) beta testing — choice and number of beta sites, duration of beta, and modifications during beta; 4) implementation — when to roll out the product, documentation and instructions, and different needs for some libraries and/or subscription agents; 5) on-going development — what prompts change, how to test when multiple vendors/libraries are affected, and the need to incorporate changes within software releases. She then discussed the primary development goals for Innopac interfaces which include achieving the purpose of the interface, integrating with library procedures and workflow, integrating with other Innopac programs, and making the interface attractive to the library.

PRECONFERENCE 2
RISK-TAKING FOR LIBRARY PIONEERS

Johann van Reenen, Director, Centennial Science and Engineering Library, University of New Mexico
Reported by Sandy River

This preconference was part pep talk and part planning session for the participants' next ventures in risk-taking. Van Reenen's goals were to explain risk-taking and its alternatives, to change attitudes about risk-taking, to encourage constructive risk-taking, and to get the participants to recognize that risk-taking can be an antidote to anxiety.

We tend to take a negative view of risk-taking, thinking that it involves injury, damage, or loss. This negative attitude leads us to make excuses for not taking risks. While it is true that there is no safety net, Van Reenen contends that we become better risk-takers with planning and practice, though it takes a lot of risks to get good at it. And, he explained, there are reasons to view risk-taking positively. Life cannot get better than it is now unless you take some risks. Those who take no risks lose the capacity to do so, while those who do venture forth develop better venturing skills. He asked us to reconsider the old expression "nothing ventured, nothing gained," suggesting that what we really mean is "nothing ventured, nothing lost."

Risk-taking is important for libraries and librarians at this time because of the rapid change we are experiencing. The serials cost crisis is one such change. The move to quality management or quality improvement is another. We must recognize the risk-takers on our staffs, support them, and learn from their failures.

Van Reenen outlined what he called the risk-taking cycle: you risk; you learn from the results; you think differently; you make more effective decisions in the future; you get better results. But he also offered these cautions; never risk more than you can afford to lose; don't risk a lot to get a little; consider both the odds and your intuition.

The planning portion of the session involved groups of three participants, each describing a risk he/she plans on taking, why he/she is prepared to take it, how it might go, and what might be the lesson. As each person described the risk, the others in the group offered advice on the plan. Among the various risks described were changing jobs or careers, asking a superior for a new title, offering an Internet workshop, and constructing a Web page for a work unit. Van Reenen provided a handout outlining an action plan for risk-taking.

The preconference ended with an examination of the desire for security on the job. Van Reenen pointed out that we always pay a price when we settle for security. He suggested that when we give up the need for security, then we feel more secure. As a final exercise, the participants were each asked to rank, on a scale of 1-10, their comfort with the idea of losing their jobs the next day. While there were a number of 1s and 2s from the real risk takers, the most frequently chosen number was 8. That marked us as a fairly conservative bunch, but it appeared that we walked out of the session a little more confident about taking that next risk.
WORKSHOP 1
"Finding the Missing Link: How Cataloging Bridges the Gap Between Libraries and the Internet"
Pamela Simpson, Serials Cataloging Librarian, Pennsylvania State University
Reported by Regina Beach

Pamela Simpson presented Pennsylvania State University's situation in cataloging their electronic serials to a packed audience, consisting mainly of other serials catalogers.

The decision was made to concentrate their electronic cataloging efforts on government documents in response to Congress' mandate that the GPO switch all publication activity from paper to electronic by the end of fiscal 1998. All material distributed to participating libraries in the Federal Depository Library Program will be available by remote electronic access or will be disseminated in a physical electronic format for local access. This plan places a strain on depository libraries for existing technological resources and for those in the rapidly approaching future. The Penn State staff decided to catalog as many GPO electronic serials as possible before the change-over.

The next step was to decide on selection criteria for inclusion in the catalog. Selectors use the following guidelines: 1) the same criteria as for other formats, 2) cataloging is limited to items with links on the PSU home page, 3) items previously in print or in another format already owned by the library, 4) Web version is friendlier than the other format, 5) potential for off-site use, 6) if the item is a unique resource, and 7) if it is cost-prohibitive in another format.

Before the decision to catalog, many electronic government documents material had already been put on Penn State's home page, located at http://www.libraries.psu.edu/crsweb/docs/govpolaw.htm/

Simpson discussed the bibliographic records that were included in her handout. It quickly became evident from the cataloging issues discussed by the audience, that many cataloging decisions are made based on system limitations.

WORKSHOP 3
"Serials Management in Special Libraries: Present and Future Relationships between Librarians and Vendors"
Georgia Brisco, Associate Director and Head of Technical Services, University of Colorado Law Library; Paul Wakeford, Coordinator, Resources Management, University of California, San Francisco; Anne McKee, Serials Specialist, Blackwell's Periodicals
Reported by Carol MacAdam

Georgia Brisco opened the workshop with a discussion of legal serials and vendor relations. The nature of legal serials sets them apart from others in that they are constantly changing as the law changes and they are updated in many formats which often supersede each other; (e.g. pamphlets, pocket part, advance sheets, supplements, interim bound volumes, and permanent bound volumes). Serials consume approximately 80% of law library budgets. While the law profession depends on several specialized publishers of law materials, law librarians depend upon several subscription agents who specialize in supplying them. Prices of law publications are erratic and unpredictable, and cost cutting is difficult because most law journals are core to any law collection; legal publishers have near monopolistic control of subjects and aspects of law publication, and mergers and buyouts have recently become more common. Several major publisher acquisitions have placed the Thompson Corporation in a position of considerable strength within the industry. The latest was their purchase of West Publishing Company, announced only the day before this workshop took place. Brisco concluded that law librarians need to be assertive as business partners in supplying law materials for their users. The audience was then given two case studies: how to describe Debates of the House of Commons of Canada and how to link all the respective parts of Current Industrial Reports. From this a heated discussion erupted from the audience on the multiple formats question and on description vs. identification in MARC records. These discussions continued until it was time to relinquish the room.
Paul Wakeford outlined special features of medical literature: its exponential growth rate, thorough indexing and abstracting coverage, and that, being highly illustrated, it requires glossy paper for good reproductions. Currently, medical serials consume 80% of libraries' budgets, and Wakeford predicted that the ratio will be 95%/5% serials to monographs by the year 2000. Publishers of medical literature offer greater discounts to vendors than other disciplines and indulge in the highest rates of inflation. Most medical journals have a maximum active shelf life of five years. While the majority of publications are produced by European publishers, the material contained in them is produced by US researchers and practitioners. Wakeford discussed the Red Sage Electronic Journal Library and Alerting System, a joint project between UCSF, ATT Bell Labs, and Springer-Verlag to mount digital versions of 70 journals in molecular biology and radiology and to provide browsing, searching, reading and claiming functions to users. The project is changing and will include yet more journal titles.

Anne McKee discussed the vendor's view of managing serials in special libraries. Subscription agents serve as an intermediary between sources of and users of information, and specifically between publishers and libraries. McKee gave a brief history of the development of the role of subscription agents, affected recently by the need to automate their own operations and their exchanges with publishers and libraries. Small agencies doing business since World War II could not afford the automation process and were subsumed by larger agencies in the 1980's. Agencies provide services which help manage the ordering, claiming and invoicing of subscriptions to many publishers. They maintain current bibliographic and pricing information on the titles of a multitude of publishers and provide management reports and price projections. Agency staff perform the routine chores of serials management, releasing library staff to deal with other projects. Agencies offer increasingly specialized services such as table of contents and document delivery service, collection management reports, and electronic exchange of order, claim and invoice information. Agencies also provide management services to publishers, building long term relationships that help streamline subscription management for publishers. Libraries with specialized collections and users count on agents to provide special handling, customer service staff with experience in their fields, and specialized divisions dealing with the publishers. McKee foresaw that there will be fewer and fewer agencies serving libraries and publishers, that publisher discounts to agencies will diminish, and that outsourcing of serials management will increase. Vendor partnerships with the developers of library systems will be increasingly important, allowing vendors to provide more specialized services to libraries.

WORKSHOP 7
"Format Integration and Serials Cataloging"
Crystal Graham, Serials Librarian, University of California, San Diego
Reported by Kay G. Johnson

Crystal Graham focused on the impact of format integration on serials cataloging. She began with background information about USMARC formats and an overview of Format Integration, Phase I, then presented an in-depth discussion about Format Integration, Phase II.

A primary format is still required with format integration, but all variable fields are valid for all formats. Format Integration, Phase II had a strong impact on serials cataloging by requiring that serials format can only be used with print serials. All non-print serials are cataloged on their respective non-print formats. Seriality is considered a secondary characteristic for non-print formats, and is reflected by a code leader/07 (BLvl) of s and an optional 006 field that contains elements (such as frequency and regularity) that aren't included in the non-print format fixed fields.

Graham illuminated the benefits, drawbacks, and future questions about format integration. While format integration provides for describing materials in several physical formats and reduces documentation, bibliographic records are more complex and local systems are unable to accept, display, or index new codes. Where would a format-specific catalog place a serial map? How would a searcher use format
qualifiers to find a serial computer file? Format integration has caused catalogers to reexamine using separate records for multiple versions and has raised questions about whether or not all digital materials should be cataloged as computer files.

WORKSHOP 10
"Improving In-house Communication About Serials"
Sherry Palmiter, Head, Serials Acquisitions Unit, McKeldin Library, University of Maryland at College Park; Jeanne Baker, Head, Serials Cataloging Unit McKeldin Library University of Maryland at College Park
Report by Nancy J. Chaffin

This workshop described the experiences of the Technical Services Division of the McKeldin Library, University of Maryland, College Park in applying Continuous Quality Improvement techniques to address poor communications of procedures for processing serials.

Three years ago, the administration of the University of Maryland, College Park mandated using Continuous Quality Improvement teams to address problem-solving, program development, and other planning. The Office of Continuous Quality Improvement was established to assist units throughout the University in developing, training, and implementing teams to address the quality of services and products offered to the University community. The Library had already formed a dozen teams to address both library-wide and intra-divisional issues when the quality of communication about serials processing became of concern.

Serials processing is not confined to the Technical Services Division of the McKeldin Library, and the communication channels with other units that process serials lacked consistency and timeliness in reporting data. The topic of improving communication seemed appropriate to CQI techniques, and a team was formed consisting of representatives from the various units that process serials and two public services staff. Jeanne Baker served as Team Leader.

Baker and Palmiter described the processes of identifying the problem, determining the appropriateness of CQI techniques, writing a team charter, forming the team, working through the problem, and developing a set of recommendations. Three areas were identified for close scrutiny: documentation, training, and communication. The team used both a questionnaire and focus groups to determine who might need additional training, who required documentation, and what techniques for communication might be most effective. As a result of the team’s efforts, a set of recommendations were issued and have since been implemented. The package of handouts given to workshop attendees included University documentation on the CQI processes, the Serials Communications Team charter, the questionnaire sent to UMCP library staff, and summaries of the recommendations of the team and the implementation of those recommendations.

Discussion of the team process itself followed. UMCP library staff are still learning the basic concepts of working in teams. With experience, staff will have a clearer understanding of the roles and expectations for team members, sponsors, and facilitators. Team membership will need to expand to include other types of employees, such as part-timers and students. Working in teams is more time consuming, especially initially. Data collection is more rigorous, and qualitative analysis techniques can take much more time, both in gathering and in analyzing.

WORKSHOP 12
"Web Worlds and Hyperspace: Exploring More Advanced Topics in Web Authoring"
Birdie MacLennan, Serials Coordinator, University of Vermont; Steve Oberg, Head, Bibliographic Control, University of Chicago
Reported by Corinne Jacox

The workshop began with Birdie MacLennan discussing design elements of web authoring. Begin by defining the scope and purpose of the Web site. Also think about who the intended audience is. MacLennan then compared the creating and design of a Web site to creating and designing a quilt. First you must gather everything you want to put it together. Then you weave and stitch it together. MacLennan also covered items that can be included in a Web document: links, special character formatting, graphics, and tables. Since this was a hands-on workshop, MacLennan then led the group through linking within a single document.

Steve Oberg then discussed the next steps in Web authoring. This part of the workshop was a mixture of show and tell combined with some hands-on work. Current hot topics in Web
authoring are Java, image maps, and Adobe Acrobat. Oberg covered external media that can be included in a Web site, such as video and audio files; he pointed out that these are large files, so one should keep the user in mind when including these. Using CGI scripts for forms and image maps was then explained. Oberg concluded with a discussion of HTML editors and converters. Oberg also mentioned a resource that is extremely helpful in Web authoring (Scharf, Dean. HTML Visual Quick Reference. QUE, 1995).

**WORKSHOP 14**
"Using Focus Groups to Meet User Expectations"
Sheryl Williams, Head, Serials Department, Leon S. McGoogan Library of Medicine, University of Nebraska Medical Center
Reported by Nancy J. Chaffin

This workshop began with a brief statement about a problem that was faced at the Leon S. McGoogan Library of Medicine, University of Nebraska Medical Center — space. More properly, lack thereof. Although the Library's staff were capable of determining various solutions — such as microform instead of paper, weeding, or remote storage — they were less sure about what impacts any of these solutions would have on the users of the library.

Sheryl Williams moved between interactive sessions with the workshop attendees and a description of the actual experiences at the McGoogan Library to illustrate the techniques of engaging others (in this case, attendees) in determining solutions to service problems. The first interactive session identified the strong and weak points of both focus groups and surveys for data collection. Using the list the attendees had generated, Williams explained why the Library chose focus groups over surveys. Continuing to engage the audience, Williams identified each piece of structuring the focus groups, including identifying aspects of the space problem, developing the questions for the focus groups, the pros and cons of using a professional (or trained and experienced) facilitator, whom to invite, how to invite them, and how to conduct and record the focus group sessions.

Williams recommended that libraries analyze the focus group responses themselves. This not only saves costs, but allows the library to view the raw data, not just a synopsis of it by the facilitator. She showed a matrix that was used for the analysis of the space problem data and explained briefly how the matrix worked. She ended with an critique of the process and a "wish list" for next time: using better recording equipment, prioritizing the list of participants, and developing better questions. Finally, she recommends addressing concerns as part of the report and letting the analysis age for a while before making recommendations based on that analysis.

**WORKSHOP 15**
"Educating/Retraining Serialists for Change"
Barbara Hall, Head, Acquisitions, University of Southern California
Reported by Carroll Davis

Technological change is requiring libraries to develop new and ongoing training programs. Staff must be computer- and Internet-literate to do everyday work and need continual retraining to keep skills at desired levels. Added services, reorganizations, and other realities also necessitate more training and retraining. Barbara Hall explained and demonstrated key steps, principles, and methods for developing skills training programs. Training is a key to organizational success, and supervisors are the persons who know best what is needed.

Hall distinguished "teaching," which may focus on abstractions, from "training," which is aimed at producing change. Technological skills training should include some background theory, to help trainees cope with a changeable environment. But its defining purpose is to bring skills to a desired level for practical use, so it is typically specific and often task-oriented.

Hall outlined five steps to success in developing training programs: (1) assess training needs; (2) plan training sessions and learning objectives; (3) select the best training methods; (4) use principles of adult learning for better results; and (5) evaluate and measure outcome.

Demonstration and student practice are the key methods for most skills training. Hall demonstrated these by training participants to operate the overhead projector she was using (and complimented them for being "quick learners").

Key principles of learning for skills training include: make learning active; make learning appropriate to needs, with clear goals; motivate students to want to learn; channel learning...
through multiple senses; use two-way communication; give and get feedback; plan short sessions where you repeat, recap, and review; and make beginnings and endings of sessions count, since people usually learn best what they learn first and remember best what they learned last.

Finally, Hall gave participants an outline and a planning form to help them start their own training action plans.

**WORKSHOP 16**

"Pioneering Document Delivery"
Clare MacKelgan, Marketing Manager, Network Support Inc.; Terry Sayler, Head, Interlibrary Loan, University of Maryland, College Park
Reported by Corinne Jacox

The workshop began with Clare MacKelgan outlining how Network Support Inc. (NSI) has implemented an automated Document Delivery system called Relais. Relais is the commercialization of IntelliDoc (Intelligent Document Delivery), which is an electronic Document Delivery system that was developed for CISTI (Canada Institute for Scientific and Technical Information). IntelliDoc is able to accept orders from multiple sources, identify the client, route requests to stacks, manage problem requests, convert documents to the format requested, calculate the amount to invoice, and track requests. IntelliDoc was developed to increase revenue, increase growth in volume, shorten turnaround time, provide variety and flexibility in services, and provide reliable service. The benefits that have occurred since the implementation of Relais are being able to provide multiple delivery options, reduced cycle times, a reduction in delivery costs, and improved staff working conditions.

Terry Sayler then discussed SAILOR, Maryland’s Online Public Information Network. Sayler began by saying that libraries are in the business of providing information. Originally, libraries were able to do this through ownership of materials, but as information has grown this has changed to providing access to information. This can be seen in recent on-line innovations such as locating materials through OPACs and services such as UnCover; requesting materials through services like Reveal; and expediting delivery via fax machines, Ariel, UPS, and FedEx. Now we also have state library on-line information networks that provide free access to information and are never closed. They can also provide full-text delivery of information. Sayler feels that these are the pioneers for the next century in Document Delivery. SAILOR, which began in 1989 as a vision and was brought up in December 1995, is such a network. Sayler then showed some of the features of SAILOR, which include a list of databases, a union list of periodicals in Maryland, and delivery of full-text journal articles via the Web. Some of the features require user accounts. Internet sites included in SAILOR are selected by TARS (Topical Area Reviewers) according to a collection development policy. Sayler concluded by saying this is a way for ILL to grow beyond the building and also to put up abstracting and indexing services so ILL can focus on more esoteric information.

**WORKSHOP 17**

"Virtual Trailblazing: Incorporating Electronic Journals into an Academic Library"
Karen Howell, Head, Networked Information Development, Center for Scholarly Technology; Rayette Wilder, Project Librarian, Center for Scholarly Technology; Lorraine Perrotta, Serials Librarian, University Libraries; All from the University of Southern California
Reported by Regina Beach

Karen Howell outlined the process for developing the Electronic Journals Pilot Project begun in late 1993/early 1994. The impetus came from their library dean who approached her with, "Do something with the Internet." There were a number of issues to consider before the project got off the ground. Those included: who would sponsor the project once it was completed; who would have access to the intellectual, physical, and networked information; who would be making the collection development decisions; and how to handle archives and backfiles. Howell knew that she would have to be partnering with librarians in order to complete the project and faced some constraints in that area: the Serials Librarian position at that time was unfilled; the University was having budgetary problems and there would not be any new positions; and a new integrated library system was in the planning stages of development. However daunting these drawbacks were she had some resources. The Center for Scholarly Technology had a R & R development unit, and Howell was able to hire a library intern, Rayette Wilder, who later became Project Librarian.
Rayette Wilder then discussed how she developed the project through a case study approach. She studied the Mr. Serials Project, the CIC electronic serial collection, SUNY-Morrisville's Project, and Virginia Polytechnic's Project. Based on her findings she decided that a hypertext model would be best for the USC collection, to impose existing collection development criteria for content to electronic journals, and to give preference to material on the Web for technical reasons. There were also access issues to consider such as more electronic publishing is being done on the Web; fewer e-journals are being distributed via e-mail; a gateway interface created to USCinfo allows for title-only viewing of journals; and cataloging. Wilder emphasized the importance of cataloging e-journals for subject access. She also brought out the thorny issue of maintenance. At USC it had been decided that the logical person to do this was the serials librarian.

This was Lorraine Parrotta's cue to get up and give her portion of the presentation. She first gave some background on the Serials Department's environment and situation. USC has over 18,000 current subscriptions and standing orders. E-journals were very difficult for them to integrate into their workflow because they were migrating to a new system at the time. Staff needed to have skills with the World Wide Web. From a technical services standpoint, Parrotta identified four major issues: selection, acquisition, serials control, and cataloging.

Elaborating on selection, she listed some of the problems that USC had encountered such as: the level of awareness and interest in the project varied among selectors, active selectors have more influence over the subject representation in the collection, selectors want table of contents journals as well as full text e-journals, but do not always distinguish, and the current policy is critical to their success. The project impacted acquisitions to a lesser extent. Staff time and money were not spent on extensive record keeping, USC is archiving on a local file server those e-journals not already self-archived, and electronic resources requires more teamwork. Under serials control, USC is wrestling with the issue of e-journal maintenance. Currently its done manually. Holding statements are provided on the cataloging records. Cataloging policy is still evolving as to what is to be included in the OPAC.

Discussion following the speakers was very lively. There were many questions asked on the various points outlined above and they continued until the next workshop needed to use the room. USC's electronic journal collection is located at:

http://www-lib.usc.edu/Info/Aq/Eljournals/

INDEX.html

WORKSHOP 19
"Seven Myths about the ISSN"
Regina Reynolds, Head, National Serials Data Program, Library of Congress
Reported by Kay G. Johnson

Regina Reynolds told the story of Serial Sam and his "hooks to holdings" project, then put the audience to work in trying to identify Sam's misconceptions and mistakes involving the ISSN. After a rousing discussion that brought out such points as: ISSN is both singular and plural, and ISSN are assigned by ISSN centers worldwide, Reynolds outlined the history, importance, and processing request procedures of the ISSN. She also discussed the National Serials Data Program (NSDP) and explained its relationship with the ISSN Network, the U.S. Post Office, and other organizations. The NSDP continues to work on/towards projects such as an ISSN Web page and expanded coverage of electronic serials in light of funding, staffing, and administrative reorganization challenges. In conclusion, it turns out that the Serial Sam story had a happy ending.

WORKSHOP 20
"Serials Exchanges: Streamlining and Elimination"
Carol Pitts Diedrichs, Head, Acquisition Dept., The Ohio State University Libraries; Tricia Davis, Head, Continuation Acquisition Division, The Ohio State University Libraries
Reported by Judith Janes

Carol Pitts Diedrichs described in detail the rationale, design, and implementation of a project to review exchange agreements. Although exchange agreements are longstanding, they incur ambivalent feelings but are seen as a means of acquiring items that would not otherwise be available. Ohio State University has a long history of library support for journal exchange activities. The project evaluated the exchange program from top to bottom with the specific emphasis on streamlining the process and switching to purchased subscriptions wherever possible. Collection managers were asked to review all exchange agreements in their subject area.
Whenever possible, purchased subscriptions were entered. OSU press, collection managers, and suppliers were actively involved whenever and wherever appropriate. Exchange partners were kept fully informed about the process and subscription information for titles was provided. As a result, records are automated, number of titles exchanged has decreased, and a systematic review mechanism is in place.

NASIG 11th ANNUAL CONFERENCE (1996): REPORTS NETWORKING NODES

(Ed. note: not all Nodes are represented in this issue of the Newsletter. We hope to pick up the missing Nodes in the next issue)

SERIAL VENDOR TRANSFERS: EVALUATION, CONSIDERATIONS, AND WARNINGS
Reported by Amey Park, convener

This discussion group was attended by approximately 35 librarians and vendors and focused on relationships between them. Questions concerned methods of evaluating customer service when considering new vendors (one possibility is to consider asking potential vendors for references of libraries which have recently left their service) and elements that vendors would find helpful from librarians (one suggestion was post-evaluation meetings for "losing" vendors). All participants agreed that open and honest communication about needs and problems was critical for successful relationships between vendors and librarians.

UNION LISTING
Reported by Margi Mann and Cathy Kellum, co-conveners

A small but very dedicated group interested in union listing met at the NASIG '96 conference, led by Margi Mann of NLM and Cathy Kellum of SOLINET. Following is a summary of the discussion.

Overall Themes:

1. There is a greater integration developing between ILL and holdings activities. As a result, librarians who report holdings (whether for their institutions or on behalf of other institutions) are interacting more with interlibrary loan staff. Consensus among attendees is that union list personnel need to initiate a dialogue with ILL staff, train them how to interpret holdings, and be aware of developments in automated ILL systems.

2. Due to increasing network activity, serials subscription cancellations, and increased automation, ILL staff are dealing with an overwhelming volume of ILL requests. Consensus: ILL systems need more automation; be aware of this historic all-time-high volume, and treat ILL staff kindly.

3. Union listers are facing new challenges in trying to report holdings for full text journals, electronic journals, and other non-traditional formats such as books, CDs, and newspapers. This, in turn, raised an interesting ethical issue of whether or not institutions should report holdings for a title or item that causes ILL problems, especially in regard to the current ANSI Z39.44-1988 rule to report ANY portion of a volume held, even if it is only one issue. No consensus or conclusion.

General News Items:

1. M. Mann reported that the OCLC to SERHOLD interface problem had been fixed in October 1995. Institutions can now report holdings in OCLC that meet the new ANSI standard and contain captions; the captions will be stripped when the holdings are forwarded from OCLC to SERHOLD.

2. C. Kellum reported that OCLC is about to begin field test of a USMARC Holdings to OCLC via tape load batch loading capability, currently titled "Automated LDR Updating." There is no date at present for when it will be available for users.
Attendees expressed an interest in an OCLC holdings export capability via ftp. This would eliminate the current production of tapes used exclusively to report holdings to other holdings utilities (e.g. NLM) or local systems.

The OCLC display feature "Custom Holdings for Union List" was also briefly discussed.

3. M. Mann reported that NLM is currently in beta test of an ftp reporting capability to SERHOLD. She also reported that NLM has streamlined its tape reporting procedures. The implications of this new capability were discussed. Institutions reporting to SERHOLD were encouraged to change their internal procedures to title modification updates rather than global updates.

Interestingly, some attendees at the UL node met informally several times after the "official" networking node slot to continue the discussion and raise other points.

Consensus: The union listing networking node will meet again next year at NASIG '87!

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PARAPROFESSIONAL CONCERNS
Reported by Kathy Sweet, convener

Twenty-two attendees, including 4 librarians, made this third consecutive discussion node on the role of the paraprofessional in today's serials world an invigorating and thought-provoking experience. Many items were brought forward for group comments, especially the need for more conference workshops aimed at the paraprofessional. These workshops should address hitherto neglected areas of concern such as the advent of personal computers as well as mainframe programs in the work of the staff and how to best become adept at integrating this development into one's career.

The group went on to voice a majority concern that paraprofessional staff have been, for some time, asked to perform duties that previously were in the sole domain of the professional librarian, such as reference desk duty and administration, without corresponding compensation. While discussion was positive and constructive, there was a feeling that these concerns were and are still being ignored by library management.

Clearly there was felt a need for better communication channels to be opened between librarians and staff. This may require more frequent meetings and the nurturing of the "team" concept in facing and solving problems. These meetings should be so structured (including a circular seating arrangement) so that all would be encouraged to participate rather than feel stifled due to their hierarchical rank in their library. Leaders should be able to stimulate discussion without dominating it, and it was felt that, then, all would participate and it would be a more fruitful venture.

The hour passed by quickly and many items, such as creating a job distribution notification list were suggested at the conclusion and should be held for future node discussion.

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GETTING PUBLISHED
Reported by Cindy Hepfer, convener

Seventeen aspiring authors attended the Networking Node, "Getting Published," offered by Cindy Hepfer, editor of Serials Review. The session opened with those present introducing themselves and describing the kinds of publication their institution expect of them for tenure, promotion, etc.

Hepfer then discussed with them:

- Things to consider when deciding where to submit a manuscript
- Possible types of articles/publications
- Practical steps to getting a paper published
- Good publications for serialists to publish

In/Read

She also distributed a list of library journal editors who would appreciate manuscripts dealing with serials issues. In addition to Serials Review, Serials Librarian (edited by Jim Cole), Library Acquisitions (edited by Carol Diedrichs), and Library Resources & Technical Services (edited by Richard Smiraglia), were all listed as appropriate publications for articles on serials issues.

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SERIALS CATALOGING
Reported by Pamela Simpson, co-convener

The Serials Cataloging Node met with about 50 people in attendance. Jean Hirons gave a
CONSER report, then four mini-presentations on monographic series followed.

Beverley Geer-Butler gave an update on the memorable workshop "Keep Them Doggies Rollin" presented by Beverley and Bea McKay at the 9th NASIG in Vancouver. The practice of using notes in series authority records instead of relying on coded information has greatly improved the turn around time for items in series, and has reduced errors significantly.

Kay Teel, Serials Cataloger at New York University, talked about series treatment decisions at NYU. These decisions are now made by Kay, in consultation with subject specialists when needed. Unfortunately these decisions are recorded only in the acquisitions module of the local system, so not everyone can access the information.

Regina Beach, Serials Cataloger at Mississippi State University, has written a series authority manual for a consortium of several libraries in Mississippi. She gave examples of various sections of the manual and discussed the writing process.

Jeanne Baker, Head of the Serials Cataloging Unit at the University of Maryland, discussed the decision at her institution to begin inputting serial bibliographic records for numbered monographic series which are cataloged and classed separately, in addition to those which are classed together. She showed examples of how these records look, pointing out notes intended to help the patron search for individual titles since search by title and search by series are separate searches in her local system.

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EDIFACT IMPLEMENTATION
Reported by Danny Jones

Conveners: Friedemann Weigel (Otto Harrassowitz), Jerry Persons, (Stanford University), Jane Maddox (Otto Harrassowitz)

This session provided those involved in EDI and those interested in learning about it an opportunity to get down to details about EDI implementation. Persons started with a discussion about Stanford's aggressive approach to implementing EDI as part of its re-engineering of library processes. Weigel and Maddox discussed the EDI progress being made in Europe. Several ILS vendors in attendance discussed their efforts at implementing EDI.

The conveners announced an electronic forum to be hosted at Stanford called EDIFACT in LIBRARIES FORUM (ELF) www.elf.stanford.edu. The purpose of the forum is to facilitate electronic commerce between libraries and their booksellers and subscriptions agents, through the implementation of UN/EDIFACT business transactions for books and serials.

There was substantial discussion of the issues at this session from librarians, vendors, and ILS representatives, suggesting that scheduling sessions of this nature earlier during the NASIG conference might increase the networking for which NASIG is so well known.

NASIG 11TH ANNUAL CONFERENCE (1996): REPORTS USER GROUPS
(Ed. note: not all User Groups are represented in this issue of the Newsletter. We hope to pick up the missing User Groups in the next issue)

SIRSI USER GROUP
Reported by Denise Novak

Ten Sirsi users, two vendor representatives, and two librarians from institutions interested in Sirsi met informally for an hour on Sunday. Denise Novak, CMU Libraries, convened the group and after introductions were made, began with a brief overview of the current status of the new release of the Version 8 software. Carnegie-Mellon University Libraries is beta testing the software for Sirsi; Novak related what was happening at CMU. The rest of the hour was spent asking questions and getting answers from each other on how the serials module is used at each other's libraries, what kind of migration experiences we had with other systems, and exchanging e-mail addresses. It was great meeting each other and we hope to meet again next year.

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VOYAGER USER GROUP
Reported by Maggie Rioux, convener

Voyager (Endeavor Information Systems) users had their first ever users group session at
NASIG this year. We had a small group, but we were there! In addition to myself (from MBL/WHOI Library) there was a representative from the University of Pennsylvania, which is in the final stages of paperwork before beginning data conversion. There were also two representatives from the University of Windsor (Canada) at the conference, but they had to leave early, so couldn't join us at the meeting. We also had four people from three universities which are not Endeavor customers but are looking seriously at Voyager software. Hopefully they'll join us as users next year at NASIG.

Since I was the only one present actually using Voyager serials, the discussion centered around what the module looks like and how it works in practice. We also talked about Voyager’s multi-tier client/server architecture and how we at MBL/WHOI use other modules as well as serials. We hope to see more Voyager users next year at Ann Arbor.

CARL USER GROUP
Reported by Joyce Tenney, convener

The CARL Users Group received an update from Marla Whitney of CARL on the new release of SRAQ. SRAQ 7.26.1 is planned for limited release to authority control sites. This release provides an enhanced interface to the new authority control bibliographic database structures for users of Serials & Acquisitions. SRAQ 7.26.2 is planned for general release and will provide for enhanced collection development features. This should be released at the end of the summer.

CARL is working on X12 interchanges with Brodart, Baker & Taylor, Ingram, Midwest, and Yankee. The timetable for the Cataloger's Workstation has not been set yet, but they are moving along.

Several questions on various aspects of SRAQ and Bibliographic Maintenance were received in advance of the meeting and Marla discussed them with the group.

DRA USER GROUP
Reported by Nancy Gibbs, convener

The DRA User Group met with about twenty people in attendance. We had a broad level of users who asked about: ReportWriter; how to accomplish specific tasks in DRA acquisitions module; advantages/disadvantages of doing a task in a particular manner; cleaning up item records before conversion; problems encountered implementing MFHL (MARC Format for Holdings and Locations).

As several participants were new to the DRA ACQ/Serials module, the expertise of others was extremely helpful. The group decided to establish an electronic list of members which could be used to share information and ideas.

The new system is due for release next March. It is assumed that the next DRA/NASIG User Group meeting will afford a lively discussion of the enhanced capabilities for Acquisitions and Serials.
SECRETARY'S REPORT

Susan Davis, Secretary, gave a brief update on the Board meeting held just prior to the conference. The Secretary's report was approved. (See Board meeting minutes in this issue for a full report.)

TREASURER'S REPORT

Dan Tonkery, Treasurer, presented his report. NASIG's finances are in good shape, with a current balance of approximately $298,482. He noted that we have yet to pay all the conference expenses, so we are not as well-off as it may appear, although the treasury has a healthy balance. Membership stands at 1,108, an all-time high. Income from last year's conference was $24,511. NASIG is well within its approved budget, so far only $16,576 has been expended. Total operating budget is $59,240. The Treasurer's report was accepted.

AWARDS AND RECOGNITION

Awards were presented to outgoing Board members, October Ivins, Bobbie Carlson and John Tagler, in recognition of their service to NASIG. Outgoing Committee Chairs were also recognized and presented with a token of appreciation from NASIG for their contribution: Theresa Baker (D&D), Sandy Folsom (Bylaws), Gail Julian (Student Grant), Steve Murden (N&E), and Joyce Tenney (RC&M).

Special awards were given to Ann Ercelawn to recognize her service as NASIG-L listowner and Dorothy Collins, long-time member of the Finance Committee. The Task Force on Electronic Access was recognized for moving swiftly and smoothly to find a new home for NASIG's electronic services: Marilyn Geller, Ann Ercelawn, Steve Oberg, Maggie Rioux and Birdie MacLennan.

Members of the Conference Planning and Program Planning Committees were honored.

Outgoing Proceedings Editors, Beth Holley and Mary Ann Sheble were recognized, as was Bob Persing, Proceedings Indexer.

Julia also introduced and thanked all the continuing committee chairs, the Newsletter Editor-in-Chief and Newsletter Editorial Board, and the Archivist. All volunteers (committee, task force members, etc.) were asked to stand and be recognized.

Julia also thanked the past presidents who assisted her during the year.

OLD BUSINESS

There was no old business.

NOMINATIONS & ELECTIONS COMMITTEE REPORT

Steve Murden, chair, reported on the results of the election held in the spring. Susan Davis was elected Vice-President/President-Elect, Connie Foster was elected Secretary, Jean Callaghan was re-elected as Member-at-Large and Carol Diedrichs and Ann Ercelawn will join the Board as newly elected Members-at-Large. These terms begin at the conclusion of the conference.

PROCEEDINGS EDITORS

Beverley Geer-Butler introduced the 1996 Proceedings Editors, Cecilia Leathem and Christine Christiansen. Linda Williams will serve as Indexer.

1997 CONFERENCE PREVIEW

Tom Champagne served as spokesperson for the 1997 CPC. The conference will be held May 29-June 1, 1997 at the University of Michigan in Ann Arbor. He conducted the drawing and B. Geer-Butler drew Allison Sleeman's name as the lucky winner of a UMich t-shirt.

NEW BUSINESS

There was no new business.

ADJOURNMENT

The meeting was adjourned at 9:12 a.m. (Julia retained her record for finishing every meeting by deadline!)
This year, eight library science students were awarded NASIG Library Science Grants. The grants covered the cost of their room, board, transportation, and registration to the 1996 NASIG conference at the University of New Mexico, and membership dues for a year in NASIG. The students are:

Dana Marie Beicher  
University of Oklahoma

Loretta Crowell  
Wayne State University

David W. Free  
Clark-Atlanta University

Randall Hopkins  
University of Maryland

Kimberly A. Maxwell  
Catholic University of America

Maria Moff  
Kent State University

Virginia Taffurelli  
Pratt Institute

Richelle Van Snellenberg  
University of British Columbia

Each of them completed a survey about attending this year's NASIG Conference. The following is a sample of their responses:

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

First, students get exposure to the multifaceted elements of the serials field. Without this exposure, it would be impossible to make an informed decision about which aspect of serials to pursue. Second, the conference is an extraordinary opportunity to meet people current in the field — on the cutting edge of serials applications. Finally, the conference is able to demonstrate — in a way impossible for course work — the thoroughly dynamic and expansive aspects of serials.

Conferences are good ways to find out how the theories and skills one learns in library school are applied in real life. At school, we often only deal with the cutting edge issues, but in reality many libraries are dealing with problems on a more basic and practical level.

How did attending the conference benefit you personally?

The conference was an eye opening experience. I had no idea so many people were interested in the same things I was. The other student grant recipients have become contacts that I will keep for a long time. I was also able to meet many exiting people who were generally interested in my school and ideas for the future.

NASIG gave me the opportunity to meet valuable contacts from around North America and close to home. It has also made a difference to me in my job search, as I have developed some employment opportunities as a result of talking to employers about some of the sessions I attended regarding the acquisition and maintenance of electronic serials.

Did attending the conference influence your career plans?

With as many people as I talked with at the conference and as many wonderful workshops and lectures I attended, I do not see how it could have not influenced my career plans! I had planned to work with serials in some capacity even before attending the conference, and in that sense I was not really swayed to get involved with serials. However, I definitely saw some opportunities that I did not know existed.
My experiences at the conference increased my interest in serials work. The innovations and issues raised by session presenters showed that serials work represents an area of both challenge and innovation, as librarians struggle with providing the best access to information through both traditional and developing electronic media.

What suggestions do you have for the 1997 NASIG student grant program?

I wish there would have more formal introduction between the grant recipients and the committee members. Also, maybe the grant recipients should be paired up with mentors, much like the new members. However, I did find many willing participants eager to take me under their wings and guide me along.

More mention could be made of the job board at the opening of the conference. I did not discover the job board until the last day. Attendees could be encouraged to bring employment notices to NASIG. I talked to some attendees who said they had jobs in the works, but had not thought to look for candidates at NASIG.

Additional comments or suggestions

Everything was so well prepared, so well organized, so informative. What a pleasure to have been able to attend such a conference! Better than I could have imagined. Easiest the best conference I have attended. Thank you so very much.

I had heard rumors that NASIG was one of the best library conferences around and it is true. To the Conference Planning Committee: just keep doing whatever it is you have been doing and NASIG conferences will continue to be the success that they are.

CALL FOR NOMINATIONS FOR NASIG OFFICERS AND EXECUTIVE BOARD

Once again, it is time to begin the process of nominations and elections for NASIG Officers and Executive Board members.

A nomination form is included in this issue of the NASIG Newsletter, for the positions of Vice-President/President-Elect, Treasurer, and Executive Board Members-at-Large. Nominations will be accepted by the Chair of the Nominations and Elections Committee through October 15, 1995, and can be sent by e-mail, fax, or snail-mail.

Individuals whose names are forwarded must be NASIG members in good standing and be eligible for consideration according to Article IV, Section 2 and Article V, Section 2 of the NASIG Bylaws, adopted 4/19/94. Members of the 1996/1997 Nominations and Elections Committee are not eligible for nomination.

The following positions, with descriptions of their responsibilities, are scheduled for election:

VICE-PRESIDENT/PRESIDENT-ELECT 1997/1998-1999/2000 Coordinates Annual Conference Program and site selection during term of office. Assists President with committee appointments. Carries out duties of President in that officer’s absence. Fulfills term of office of President should that position become vacant. Serves as liaison to one or more committees. Serves as Past President in third year of term.


EXECUTIVE BOARD MEMBERS-AT-LARGE 1997/1998-1999/1999 (3 to be elected) Represents general membership on Executive Board. Carries out special duties and responsibilities. Serves as liaison to one or more committees.

NASIG has had a strong tradition of leadership during its first decade. Please help us continue that trend by placing in nomination the names of individuals who can make significant contributions to the organization. If you feel that describes you, please do not hesitate to nominate yourself.

1996/1997 Nominations & Elections Committee:
Jane Branham, SE Louisiana University
Ladd Brown (Georgia State University Law)
Emerita (Emma) Cuesta, Hofstra (Chair)
Christie Degenh (UNC-Chapel Hill)
Julie Gammon (ex-officio)
Barbara Hall, USC
Marcella Lesher, St. Mary’s University
Michael Somers, LSU
Kay Feen, NYU
ABOUT NASIG MEMBERS

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TITLE CHANGES
Carol MacAdams

Note: Please report promotions, awards, new degrees, new positions and other significant professional milestones. You may submit items about yourself or other members to Carol MacAdams. 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.

Congratulations and best wishes to all!

ADRIAN W. ALEXANDER is now Senior Manager for Strategic Development/Academic Market with The Faxon Company, Inc. Adrian was previously Western Sales Manager for Swets Subscription Service. Adrian can be reached at:
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E-mail: alexander@faxon.com

BERNARD "BUZZY" BASCH reports that he is taking "the biggest step of my professional career" in establishing his own subscription agency: Basch Subscriptions, Inc., your one-stop source for all periodicals needs. His addresses are:
Basch Subscriptions
28 Perley Street
Concord, NH 03301-3953
Phone: (803) 225-5109
Fax: (803) 226-9443

ROLLY HARWELL points out that we need to make a correction to his name in the latest membership directory. Please update Rolly's entry from Howell to Harwell. Rolly also has a new email address at harwellr@sherserv.etsu-tn.edu. All other addresses are accurate.
Rolly Harwell
Periodicals/Microforms Librarian
Sherrod Library
East Tennessee State University
Box 70685
Johnson City, TN 37614
Phone at work: (423) 929-6996
Phone at home: (423) 929-0444
Fax at work: (423) 461-7026

Marilyn Kercher writes: "My new job started May 1, 1996. Previously, I was a Cataloging Supervisor, TECHPRO, OCLC, Dublin, Ohio. My new job is full-time reference at the Main Library of Columbus Metropolitan Library. Off desk responsibilities include working on the UNION LIST OF SERIALS for Central Ohio. This new job represents a complete career change for me, from technical services to public services. After nearly ten years as a cataloger, I had cataloged in nearly every kind of cataloging agency there is and worked in all formats. I had a "been there, done that" kind of feeling and decided it was time for a change. Fortunately, librarianship is wonderfully broad, so there is always a new facet to explore professionally. I chose to build on my serials experience, and am very much enjoying the challenge of public services librarianship. Marilyn can be reached at (614) 645-2754, fax (614) 845-2051 and Internet:
mkercher@freenet.columbus.oh.us

ANNE McKee is now Serials Specialist for Blackwell's Periodicals, covering the West and the Pacific Northwest. She was previously with the Faxon Company in some of the same territory. Anne now focuses on academic and academic/medical libraries, a change from dealing with all types of libraries. She says she is really enjoying working for Blackwell's and is glad to be going to England once a year. Anne's new addresses are:
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VICTORIA MEDAGLIA has moved back to the greater Boston area from Maine. She was previously Serials Librarian at Bates College in Lewiston. Vikki started her new job as Cataloguing Librarian at Babson College on April 15, 1996. Vikki writes: "The change offers an opportunity to catalog in all formats and write original records for many locally produced items. I shall also take an active role in preparing Hop Library's Web pages. For me, the change means a renewed emphasis on work I love. Original
records and the Web site offer opportunities for creative participation in this library and in the profession. I've also been able to return to the Boston area where, oddly enough, all my old friends are still speaking to me." Vikki can be reached at the following addresses:

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Fax: (617) 239-5228
E-mail: medaglia@babson.edu

PATRICIA PHILLIPS has a new position as Associate University Librarian for Technical Services at the University of Texas at El Paso. Her prior job was as Coordinator of Technical Services at the University of the South in Sewanee. Pat writes: "I began work here at UTEP on May 15 after leaving Sewanee on April 24, 1996. The move from Sewanee to the University of Texas at El Paso is less a change in the kind of work I am doing but rather a move from a small private liberal arts school of 1,300 students to a large state university of 17,000 students. The scale in numbers and level of responsibility have both increased but I am excited about the change and my first weeks have proved the wisdom of my choice." Pat's addresses:

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STEVE SAVAGE started as Project Coordinator for the Wayne State University Libraries in Detroit on July 1. He was previously Team Leader for Cataloging and Processing at the Library of Michigan in Lansing. Though he enjoyed his position at the state library, Steve is glad to be back in a large, university library. His new job is an entirely new type of position for WSU. It will include working on any type or level of project involving any aspect of the University Library System, which includes Media Services, The University Press, and the Library and Information Science Program, as well as the libraries. Much of the work he will manage or in which he will participate will be part of the Quest program, which is the university’s continuous improvement initiative. Steve is looking forward to working in a wide variety of projects and is excited about the opportunity to focus on making improvements. In addition to continuing as Production Editor of the NASIG Newsletter, he is also serving on the Conference Planning Committee for next summer's NASIG conference in Ann Arbor. His new addresses are

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IN MEMORIAM

Joyce Ann Tracy died at the beginning of the summer, after a brief struggle with brain cancer. Joyce was the Periodicals Curator at the American Antiquarian Society in Worcester, MA. Memorial contributions may be made to:

Joyce A. Tracy Research Fellowship Fund
American Antiquarian Society
185 Salisbury St.
Worcester, MA 01609

or:

First Congregational Church
Church St.
Ellsworth, ME 04605

SERIALS RELATED REPORTS

CANADIAN LIBRARY ASSOCIATION
CONFERENCE REPORT
Wayne Jones, National Library of Canada

The 51st annual conference of the Canadian Library Association was held in Halifax, Nova Scotia, June 5-9, 1996. The CLA’s Serials Interest Group (which maintains a liaison with NASIG) organized a session held June 7 on the topic of providing access to and preserving online electronic serials.
I called the session “Wiring the Dory” in the spirit of the general theme of the conference, which was "Sail Into Our Future." I imagined that the challenges and advantages that electronic serials bring to libraries would be similar to fisherpersons' taking advantage of the best modern technology by rigging up their dories in order to get the biggest catches. I feared for a nanosecond that the image might be subjected to a really bad mixed metaphor, and my wired dory would be afloat (bumpily) on the Information highway.

About 45 people attended the session. There were two speakers: Nancy Brodie, of the National Library of Canada, who spoke about the library's Electronic Publications Pilot Project; and Rob Cameron of Simon Fraser University, who spoke about the university's Internet Electronic Library Project.

The National Library's project, affectionately known as E3P by participants, ran from June 1994 to July 1995. Its basic purpose was to gain practical experience in the dealing with e-serials by all areas of the library: acquisitions, cataloguing, serials check-in, collection management, reference.

Some of the findings of the project were:

- Canadian electronic serial publishing covers a broad range, including scholarly and popular periodicals, newsletters, and zines. Less than half are also published in a printed version. The typical electronic formats are ASCII, HTML, and PDF.

- Electronic publications are generally acquired via e-mail or FTP, or via "mirroring."

- Storage and preservation of electronic publications are challenging because the media of storage are subject to deterioration. Technological obsolescence is also an issue: some serials may be viewable today but not tomorrow.

E3P is officially ended at NLC, but its activities continue: electronic serials (and now monographs as well) are still collected, catalogued, and archived. To get a first-hand look, see the Web site of the NLC's Electronic Collection at:

http://www.nlc-bnc.ca/eppp/e-coll-e.htm

And for a summary of the project's final report is available, go to:

http://www.nlc-bnc.ca/eppp/ereport.htm

Perhaps Rob Cameron's presentation could be described as rocking the boat a little (once you start with these images, it is hard to give them up). One of the components of the project at Simon Fraser University is a directory of computing science journals which is developed and made accessible on the World Wide Web. The directory consists of entries for over 450 journals (electronic and print) dealing with computing science. Each entry contains not only typical bibliographic information about the journal (e.g. title, publisher, ISSN, table of contents of available issues, etc.) but also hypertext links to other resources on the Internet which might be useful to users of the journal (e.g. WWW, gopher, and/or FTP servers of the publisher, availability from CARL UnCover or CISTI document delivery services, etc.). Access to the journals and to the information about the journals is of two types currently: keyword and alphabetical by title.

The main principles behind the directory are:

- Authoritativeness and currency of information
- Comprehensiveness within a well-defined focus
- Integrated access to printed and electronic resources
- Efficiency and reliability

One of the main points is that links must not only be continually added, but also must be vigilantly maintained. There are several methods for this, for example including on-the-site e-mail contact addresses so that users can report any broken links. Automated link-checkers are a better method, but most existing ones are inadequate. One of the projects at SFU is an improved second-generation link-checker.

The idea is that this philosophy and method of providing access to computing science serials could serve as a prototype for how catalogues could be developed which take advantage of the hypertext and networking aspects of the Internet.

The Web site of the directory is at:

http://elab.cs.sfu.ca/cs-journals/
An article about the directory - published also in Serials Librarian, vol. 29, no. 3/4 - is available at:


And the site used to give the presentation itself is at:

http://elib.cs.sfu.ca/CLAtalk.html

The presentations were followed by questions to both speakers from those in attendance.

REPORT FROM THE ASIS/NASIG LIAISON
Bernard "Buzzy" Basch

The American Society for Information Science (ASIS) experienced another record year and remained financially sound. Membership increased with a noticeable rise in institutional membership. Two new SIGs (Special Interest Groups) were established, and the two annual meetings were well attended.

Hot pick and Yahoo! From scholarly publishing to Information policy, ASIS continues to explore the latest developments in information science.

Yahoo, the popular Web search engine, selected ASIS’ Web site at the University of Indiana’s School of Library and Information Science as the Yahoo Site for the Day. StartPoint, another Web browser, featured ASIS as its Hot Pick Web site.

The two new SIGs are: Information Policy; and Visualization, Images and Sound. ASIS published Tom Kinney’s Entertainment Technology and Business, and in partnership with MIT Press, published Scholarly Publishing: the Electronic Frontier.

Cliff Lynch, Director of Library Automation for the University of California, the incoming President, has promised an exciting year starting with the annual meeting in Baltimore in October 1996 and the mid-year meeting in Scottsdale, Arizona in May 1997.

Dick Hill, ASIS Executive Director, recently announced that the 1997 annual meeting scheduled for Washington, DC will be chaired by Joseph A. Busch, Manager of the Getty Art History Information Program in Santa Monica, California.

CALENDAR OF UPCOMING EVENTS
Carol MacAdam

Note: Please send announcements concerning meetings of interest to the NASIG membership to Carol MacAdam.

September 25-27, 1996
Third European Serials Conference of the European Federation of Serials Groups
Trinity College, Dublin, Ireland

October 17-18, 1996
ARL Membership Meeting
Washington, D.C.

October 21-24, 1996
American Society for Information Science Annual Meeting
Baltimore, MD

November 7-9, 1996
16th Annual Charleston Conference on Issues in Book and Serial Acquisitions
Charleston, SC

February 14-20, 1997
ALA Midwinter Meeting
Washington, DC

March 10-12, 1997
Computers in Libraries 1997
Hyatt Regency Crystal City
Washington, DC

May 15-18, 1997
ARL Spring Membership Meeting
Albuquerque, NM

May 15-18, 1997
Feather River Institute
Feather River, CA

May 23-26, 1997
Medical Libraries Association Annual Conference
Seattle, WA

May 29-June 1, 1997
12th NASIG Conference:
"Experimentation and Collaboration: Creating Serials for a New Millennium"
University of Michigan
Ann Arbor, MI

June 2-4, 1997
American Society for Information Science
Mid-year Meeting
Scottsdale, AZ
The Newsletter is published in February, April, June, September, and December. Submission deadlines are 4 weeks prior to the publication date. (January 1, March 1, May 1, August 1, and November 1). The submission deadline for the next issue is:

November 1, 1996

NO LATE SUBMISSIONS WILL BE ACCEPTED

Send all submissions/editorial comments to:

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Send all items for "Title Change," the Calendar, and "New Members" to:

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Send all inquiries concerning the NASIG organization and membership, and change of address information, to:

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Send all claims for unreceived issues of the Newsletter to:

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NORTH AMERICAN SERIALS INTEREST GROUP

CALL FOR NOMINATIONS
1997/1998 EXECUTIVE BOARD AND OFFICERS

VICE-PRESIDENT/PRESIDENT ELECT

Name: 
Affiliation: 
Address (if available): 
Phone: (if available): 
E-mail (if available): 

TREASURER

Name: 
Affiliation: 
Address (if available): 
Phone: (if available): 
E-mail (if available): 

MEMBERS-AT-LARGE

Name: 
Affiliation: 
Address (if available): 
Phone: (if available): 
E-mail (if available): 

Name: 
Affiliation: 
Address (if available): 
Phone: (if available): 
E-mail (if available): 

Name: 
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Address (if available): 
Phone: (if available): 
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Nominations will be forwarded to the Nominations & Elections Committee for review and consideration. Please mail nomination forms to:

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