



# NASIG NEWSLETTER

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## President's Corner

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### **NASIG: Building our Reach and Supporting Diversity**

Angela Dresselhaus

NASIG is evolving and we are at a point where embracing our strengths, developing new expertise, and broadening our community is important. NASIG programming has evolved over the last 10 years to include topics beyond serials, we have created formal spaces for vendor participation, and we provided spaces for students to become immersed in NASIG and the information profession. Just this past year, we had a very interesting session on the use of inferential statistics to identify trends in library data. Many people were dazzled and invigorated by the polished presentations at the Student Spotlight Session. Our vendor sponsors presented informative lightning talks, providing conference goers concise updates on the products we use every day. Who knew we would be here where we are today?

The question I would like to pose to the membership is who knows that we are more than just serials now? Are NASIG members the only people who know how the programming has expanded, how vendor participation is picking up, and how budding information professionals are learning the ropes at NASIG? Does your boss, mentor, director, coworker, know that NASIG is so much more than serials? If not, let's brainstorm ways to demonstrate our value and increase our reach. Raising the profile of NASIG at our home institutions is an ideal place to begin expanding our reach. As, I said in Atlanta, we can help shape the future of NASIG by reaching out to colleagues and committing to opening the door to someone new. Bring a friend to NASIG!

While we have come a long way towards a more diverse organization, there is room to grow, and Del Williams will be leading a committee to establish a structure to support diversity in NASIG. The committee charge is as follows:

- Recommend a permanent committee name, develop a final committee charge, and establish a guiding document for the work of the committee.
- Develop strategies to increase diversity in NASIG membership, leadership, and award winners.
- Collaborate with the Continuing Education Committee to initiate and promote educational opportunities that address issues in diversity and social justice.

Once the committee roster is made public, you will see the talent and commitment to diversity that each person brings to the group. The NASIG Newsletter customarily profiles new committees and that profile will surely be fascinating. As this committee becomes established, there will be exciting news regarding initiatives and partnerships to support diversity at the NASIG Annual Conference. This is a new chapter in NASIG history and now is the time to expand our reach and create spaces that are inclusive and welcoming.

This coming year will be a pivotal year for NASIG and our future as an organization. I invite you to become personally engaged in securing the continued success of our conference and our organization. Talk to people about the value of NASIG, share an interesting conference proceedings article, share Open Access content from the NASIG YouTube channel, and support the work of your new diversity committee. Open that door!

## **2018 Birdie MacLennan Award**

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### **Transforming the Information Community**

Tessa Minchew

I have spent much of my career in librarianship hearing that the profession is in a state of radical transformation. As a mid-career professional, it is now

apparent to me that this transformation was never going to occur in some great, single moment of combustion. It has been, and will continue to be, pushed forward by a myriad number of people running through a myriad number of iterative processes. Those of us executing these processes are not mere cogs, rather partners in the growth and success of libraries and of the larger information community. By extension, we are also facilitators of the growth and success of all whom we serve. Though we may not always receive due credit for it, librarians and other knowledge workers have a great willingness to embrace the transformative, particularly through the iterative. In this willingness, we will find a crucial key to our profession's continued value in the twenty-first century information sector.

As previously alluded to, there are so many ongoing processes of transformation in the library and information community that a short essay could not hope to even skim them all. Being an electronic resources librarian, and more broadly a technical services librarian, there were several specific points that sprang to mind when contemplating the essay topic. First, we are all very familiar with the issue of shrinking budgets and staffing, a now unavoidable constant in our field. Not so long ago, technical services began to turn to automation, of cataloging in particular, to address these concerns. When handled correctly, automation was a boon. It was not, however, a panacea. Technical services departments can still benefit greatly from reorganization and redesign with an eye toward creating more holistic processes. We should continue to examine how often we are "touching" a resource and how we can shorten its journey from acquisition to access while still providing and maintaining the high quality metadata so vital to discovery.

A natural impulse might be to search for other high-tech approaches to transforming our work, but the more low-tech approach of cross-training should be one of our next priorities. Though admittedly labor-intensive in the beginning, training all technical services employees in as many acquisitions and cataloging functions as possible reaps long-term benefits by

greatly reducing hand-offs and time spent on duplicative or repetitive tasks. In addition to streamlining work that is now being handled by an often dramatically reduced number of staff, this increased efficiency can also free time for value-added projects like the cataloging of unique materials, professional development and continuing education (particularly for staff who have not historically received support for such activities), and experimentation in areas that will represent the work of the future, work that will be less production-oriented and more project-based. As well as being given appropriate training and support in expanding their areas of expertise, employees should also be encouraged to feel ownership of their work, contribute ideas for enhancements to workflows and processes, ask for additional training when needed, and recognize that their willingness to embrace evolving roles within the organization will create a stronger, more dynamic, more sustainable future for the profession as a whole.

Transformation of the technical services department cannot stop with cross-training. Over the years, the point of access to library resources has moved from the printed card catalog to the OPAC to the discovery layer, each phase a seismic shift in library culture and the public's relationship with it. Rather than seeing this evolution as an arc with a beginning and an end inside the library's walls, I view each stage as bullet point on the itinerary of our collective journey. Fully exploring the world of non-MARC metadata will be the next stop on the trip. Linked data, BIBFRAME's use of it in particular, has the potential to lead us outside the immediate sphere of the library and further integrate us into the more broad information community.

While improving processes within our own departments is always of value, we need to branch ever outwards. Interdepartmental communication and collaboration has become even more crucial to the overall success of the library. Moving away from service silos opens up new opportunities for growth. Further partnerships between the library's information technology, public services, and technical services departments can result in an enhanced experience for patrons and informative,

innovative projects for employees. Expanding further outwards, librarians have been rethinking and reinventing the most foundational approaches to our work for quite some time. Even prior to the advent of the World Wide Web, libraries were beginning to experiment with models of access versus ownership, experimentation that continues to this day and is perhaps most currently visible in the profession's critical reassessments of the value of the "Big Deal."

Regardless of the many different transformative processes we will continue to execute, it is unlikely that the library and information community will see much respite from quips about our impending demise at the hands of the open internet and our other perceived competitors. Those unfamiliar with our profession may enjoy taking the occasional potshot at our continued relevance, and it is not incumbent upon them to educate themselves as to our worth. It is our responsibility to relate that reports of our death are not only an exaggeration, but a gross inaccuracy. Communities like NASIG give librarians and knowledge workers the tools we need to both address this inaccuracy and ensure that it does not become our reality.

### **Interview with Shannon Keller, 2018 John Merriman Award Winner**

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

I am the Helen Bernstein Librarian for Periodicals and Journals at the New York Public Library. I curate the General Research Division's periodical collection, primarily humanities and social sciences, and coordinate the e-journal collection across NYPL's four research libraries. I also have the opportunity to work with researchers and students when they come to the library to access the serials collection.

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

I first learned about NASIG when I worked with Betsy Appleton at George Mason University. She introduced me to the organization and inspired me to attend the conference. My first NASIG conference was in Buffalo in 2013 and I have not missed a NASIG conference since! I continue to stay involved because I value the opportunity to collaborate with colleagues outside my institution on challenges facing our profession. I've also really enjoyed serving as a mentor in the Student Mentoring Program and learning from the next generation of librarians.

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

When I first learned of the Merriman Award I knew I wanted to try and apply for it because it combined the opportunity for travel with meeting librarians and information professionals around the world.

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

I had a very physical reaction. I was at work, and I jumped up out of my chair in excitement. I significantly

startled my colleague who sits in the cubicle across the aisle from me!

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

My first impression at the first timer's reception the evening before the conference officially started was that everyone was very friendly and welcoming. Overall UKSG is a fantastic conference. The conference program allowed plenty of opportunity for breaks to meet new people, and the sessions were practical, informative and engaging. The dinner and quiz are great fun. I found myself brainstorming ways to attend future UKSG conferences on the flight back afterward!

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

Attending UKSG broadened my perspective about how libraries, and their collections, serve research and scholarship. We serve a very diverse group of patrons at NYPL, the nature of being a public research library, but through attendance at UKSG I realized how great the potential is for libraries to affect change across the globe. Now I take this perspective with me when I am making collection development decisions, or teaching a class of undergraduate students about the resources available to them via research libraries.

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

Most significantly, by number of attendees, UKSG is a bigger conference. I did not find it overwhelming or unnavigable. There were plenty of opportunities to meet people during the breaks, meals, and in-between sessions.

Also, the concurrent sessions are presented more than once, at different days and times. I thought this was

great because if there are two sessions at the same time you want to attend, you can go to both.

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

I have to highlight two sessions, because they were insightful and informative for different reasons. I attended the breakout session presented by Vibeke Christensen and Inge-Berete Moltke from the Royal Danish Library about their experience merging the two largest university libraries in Denmark. This session was helpful for me for practical reasons, as NYPL's Science, Industry, and Business Library is moving in 2019, and some of its collection, staff, and services will be integrated into the General Research Division (which will impact my work). It was reassuring to hear that we shared similar roadblocks in these types of situations, and to hear that the transition period is ultimately temporary and eventually this will not be one of the major focuses of my work.

The Lightning Talk Sessions (two sessions, each a half hour in length, six presentations total, each presentation being 10 minutes or less in length), are very similar to the NASIG Snapshot Sessions. I really enjoyed these sessions because they provided a diverse set of topics and presenters.

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

My takeaway is the UKSG serves a similar, but different, set of stakeholders than NASIG. I was surprised at how international the attendees were, not just librarians, information professionals, and vendors from the UK were in attendance. At dinner one evening I sat with attendees from the UK, South Africa, Sweden, Denmark, Finland, Germany, and Qatar. There was a large international publisher and vendor presence as well. The program reflected this broad set of stakeholders and had a wide range of session topics and plenary speakers. I appreciated getting to learn from new and different professionals in this regard.

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

Go for it! The atmosphere is welcoming and diverse, and the program is fantastic. I would highly recommend it!

**John Riddick Student Grant Winner Essay**

Jordan Pedersen

I was so grateful when I received the news that I would be able to attend the 2018 NASIG conference in Atlanta, which turned out to be even better than I had expected! I was especially grateful for the opportunities to present at the student spotlight session, to meet my NASIG mentor (Steve, who is super friendly and made me feel completely at ease), and to attend such a variety of sessions with such interesting people. By attending, I feel like I deepened my knowledge of technical services and collections-related issues in academic libraries especially, and I made a number of connections with American colleagues who went to great lengths to explain how American institutions work in comparison to the Canadian ones I'm used to.

In the future, I will definitely recommend that my peers apply to the extensive scholarships offered by NASIG and, in general, just get involved. For me, it was one of the first times where I felt like I was part of a professional community, not simply a student, and I think that is invaluable for anyone who is about to enter the profession. It also bolstered my confidence, and so when I returned to my TALint position (part-time work on a two-year contract) at the University of Toronto, I offered to share my experiences at NASIG with my colleagues.

Thank you again to all who were involved in securing funding for the awards, to all those I met who made me feel so welcome, and to all the presenters who I learnt so much from. I had an excellent time at NASIG 2018!

## **Interview with LaQuanda Onyemeh, John Riddick Student Grant Winner**

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

Attending the NASIG conference this year afforded me the opportunity to connect with librarians in the field. I met influential librarians in the profession, attended informative sessions, presented at the student spotlight session, and played Superfight (a card game you should play) with a group of cool librarians. I was able to build friendships and long-lasting relationships with librarians and future librarians from all over the world.

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

Yes, I was able to speak with seasoned professionals in the field and build a network of librarians. I had in-depth conversations about successes and challenges people were currently facing in their libraries, both in their roles and responsibilities. I received great advice about new workflows, trainings, and professional development opportunities. I was immersed in discussions about the future of collection services and how librarians are embracing and adapting to the changes in the field. I was able to hear real-life examples from librarians who have been in this field a long time. I received helpful tips about the job market. Many librarians shared valuable information I need in order to be a successful candidate for employment. I left the conference with an idea of what kind of skills and experiences I need to develop so I can make a meaningful contribution to the profession. It also felt great to receive a positive response to my Coral electronic resource management system presentation. I was excited to be surrounded by future colleagues who were supportive and welcoming.

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

I met students who were in the same point of their career just like me! We were able to share our experiences from internships and graduate coursework and to discuss the gruesome process of job hunting. It felt good to know that I was not alone in my career journey. I enjoyed attending the dine arounds and speaking with librarians in an informal environment. We exchanged stories, laughter, and great food dishes. Oh yeah, I gained more Facebook friends and started a Twitter account while at NASIG.

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

I learned about the NASIG awards from my supervisors Shoko Tokoro and Liz Siler. I was an electronic resources management fellow at the University of North Carolina at Charlotte. I was introduced to NASIG, and shortly after I decided to become a member. My supervisors talked about the professional opportunities, conferences, and various scholarships available to students like me.

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

NASIG can make an improvement on spreading awareness to LIS students so they can be aware of opportunities and take full advantage of them. I would like to see NASIG organize an event to visit a main attraction in the city to create more opportunities to bond casually with colleagues.

## **Interview with Arthur Aguilera, John Riddick Student Grant Winner**

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

Attending NASIG as a student provides an incredible opportunity to meet working professionals in the field you are thinking about going into. You'll often get to meet individuals whose papers you might have used in a class or whose chapters you might have read in a textbook. It's your opportunity to get first-hand knowledge straight from the geniuses themselves! It's also a great way to get connected with other students who are in the same boat as you are. These connections will most likely stick with you throughout your career.

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

Attending the conference helped me affirm my interest in working in serials and scholarly communications. It's one thing to read about this kind of work, but it's another to completely experience what the work is like through professionals who do it daily. Attending the conference definitely made me excited for the career I am choosing.

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

Aside from getting to learn more about the profession in a way that was impactful, I gained a sense of community that I wasn't expecting. By attending, I automatically felt that I was a part of something. On the last evening of the conference, I spent time with other student grant winners as we explored Atlanta and pondered what the future of library work was and how we fit in it. That personal experience made me feel more connected to the work of today and excited about the challenges of the future.

### **How did you learn about NASIG's awards?**

My colleague, Nancy Donahoo, is the one who told me about the grant awards when she suggested that I co-present with her about work we had been doing. I was so incredibly humbled for her to even suggest that I apply.

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

I felt extremely taken care of by the Awards & Recognition Committee, and Del Williams was incredible to work with. I really appreciated the time set aside for the award recipients to get together to talk about our experiences over a meal, and I hope that continues in the future. I am extremely thankful for the experience I had, and a large part of that was due to how organized Del and the Awards & Recognition Committee was.

Arthur Aguilera is an administrative assistant for Albertsons Library at Boise State University. He recently graduated with a Master's degree in library and information science from the University of Washington in June 2018. Arthur received a 2018 John Riddick Student Grant Award and was a co-presenter at the NASIG Annual Conference.

## Upcoming Conference News

### CPC Update: 34<sup>th</sup> and Pittsburgh

Denise Novak and Pat Roncevich, CPC Co-Chairs

The Conference Planning Committee (CPC) has begun planning for the 34th Annual NASIG Conference to be held June 5-8, 2019 in Pittsburgh, PA. The conference will be held at the Omni William Penn Hotel a historic landmark, elegantly renovated. Located in the heart of the city's downtown business district, the hotel is within walking distance of many of the city's cultural and sporting venues and a variety of shops.



The graphic features a dark blue background with a network of glowing orange and white nodes and lines. The text 'Oxford Journals Collection' is prominently displayed in white. Below this, three orange boxes contain the following text: 'Over 350 High-Quality Journals', 'Across Six Subject Collections', and 'Partnering with Leading Societies'. At the bottom, the URL 'academic.oup.com/journals/collection' and the Oxford University Press logo are visible.

The Allegheny River to the north of the city and the Monongahela River to the south merge to form the Ohio River. The downtown area that sits at the confluence of these rivers is called the Golden Triangle. The downtown is very walkable and flat, this is not true for most areas of the city. The hotel is across the street from the Steel Plaza, Light Rail Station (the T). The T is

free to use within the downtown area and to the North Shore. The city's must see neighborhoods: the Strip, Lawrenceville, East Liberty, Oakland, and the South Side are quick (all less than 20 minutes in normal traffic) bus rides or inexpensive Uber trips away.

Pittsburgh historically has been known as the Steel City, the remains of that industry have mostly vanished. Today Pittsburgh is known for medical research, universities, technology, and robotics. The rivers are clean and used for recreation, there are bike and walking paths along all of the rivers. Pittsburgh has become a foodie city and there are so many great and new restaurants opening every day. Yet with all of these changes much remains the same: world renowned museums, beautiful parks, historical buildings and churches, and friendly people proud of their city.

We hope that this will get you excited and energized for the NASIG 2019 Conference. We will do our part to make sure that you enjoy your time in Pittsburgh.

### Fun Facts: Pittsburgh Firsts

Denise Novak and Pat Roncevich, CPC Co-Chairs

#### 1845

The world's first wire cable suspension aqueduct bridge was built in Pittsburgh over the Allegheny River at 11th Street.

#### 1889

The first Carnegie Library in the United States was dedicated on March 30, 1889. The Braddock Carnegie Library is still in operation.

#### 1893

The first Ferris wheel, designed and built by George Ferris, a bridge builder from Pittsburgh, was the highlight of the Chicago World's Fair.



**1913**

The nation’s first gas station, built by Gulf Refining, opened in Pittsburgh.

**1920**

Pittsburgh’s KDKA was the first commercial radio station in the United States.

**1926**

The University of Pittsburgh began construction on the first university skyscraper, the 42-story Cathedral of Learning.

**1952**

Jonas Salk developed the polio vaccine at the University of Pittsburgh.

**1967**

The first Big Mac was created in Uniontown, Pennsylvania, by Jim Delligatti, a McDonald’s franchise owner.

**1971**

Mr. Yuk was created by Richard Moriarty of the Pittsburgh Poison Center at UPMC Children’s Hospital of Pittsburgh, replacing the skull and crossbones symbol.

**1979**

Carnegie Mellon University started the Robotics Institute, the first robotics department at a U.S. university, in Pittsburgh.

**1982**

Carnegie Mellon University computer scientist Scott Fahlman created the smiley emoticon.

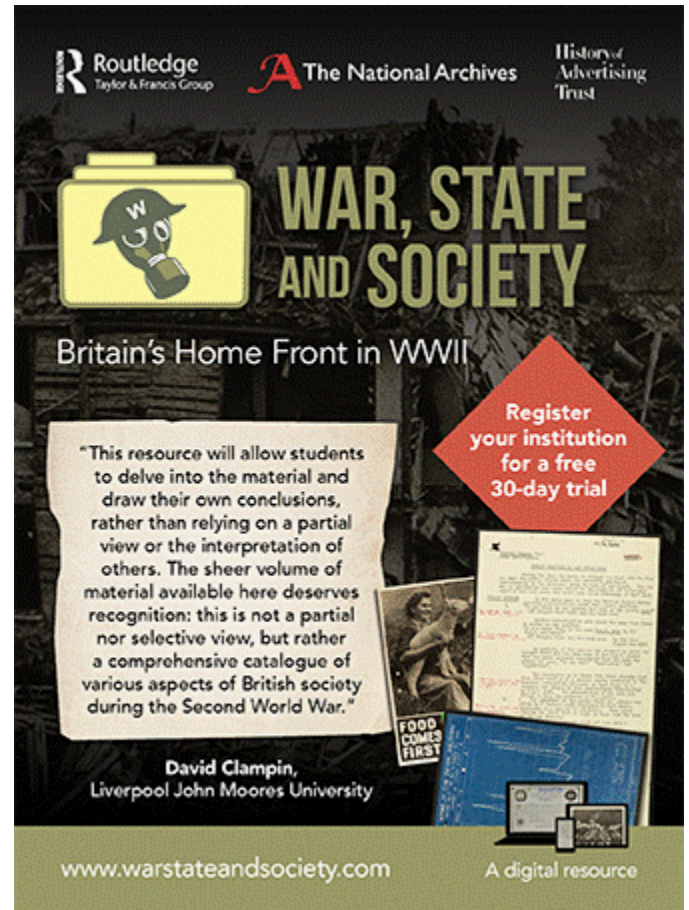
**1989**

Presbyterian University Hospital was the site of the world’s first simultaneous heart, liver, and kidney transplant, which was performed on a 26-year-old woman.

**PPC Update**

Maria Collins, PPC Chair

The NASIG Program Planning Committee (PPC) is off to a good start this year. The chairs are in the process of reviewing the committee activity for the year and creating a system for enhanced communication and distribution of tasks throughout the year using Google Drive and Trello.



The PPC is finalizing a list of vision speakers for the 2019 Conference to be reviewed by the board. We hope to have more information to share in our next newsletter report. During the committee meeting at the 2018 NASIG Conference, committee members brainstormed about possible preconference topics for 2019. These include the following: metadata/linked data, data manipulation, electronic resource management (ERM) 101, scholarly communication 101, and project management. If you have suggestions for other

preconference ideas, please send those to [prog-plan@nasig.org](mailto:prog-plan@nasig.org).

The PPC is also working on the call for proposals with the hope of opening the call from the middle of September to the middle of November.

## Post Conference Wrap-Up

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### 33<sup>rd</sup> Annual Conference 2018 Members Forum Minutes

The Members Forum took place Sunday, June 10, 2018 at 4:30 PM local time.

#### Call To Order

The meeting was called to order at 4:31 pm local time.

#### Highlights From the Past Year, presented by Steve Oberg, President

Christie Degener and Susan Davis were recognized for being at all 33 conferences.

The Program Planning Committee was recognized for organizing a strong program slate.

Highlights from the 2017/2018 year include:

- Strategic Plan 2017-2021
  - Revitalize the marketing approach
    - Turned the Publicist role into the Marketing & Social Media Coordinator
    - Implemented a marketing plan created by Non-Profit Help
    - Created the Web-Based Infrastructure Implementation Task Force (WBIITF) to recommend enhancements to website
    - Added an Instagram account
  - Expand student outreach and mentoring
    - New student mentoring program
    - Students appointed to serve on committees for the first time
  - Optimum balance between paid staff and volunteer work
    - Non-Profit Help negotiated a new, more complex audio/visual contract, which allowed for NASIG On-Demand
    - Provided a live webinar for committee chairs to orient them to their work

- There is a recommendation from WBIITF for part-time paid staff to assist in maintaining the website
- Creating new content to add to body of scholarly work
  - NASIG On-Demand includes 6 concurrent sessions recordings and vision sessions
  - Release of NASIG Core Competencies for Scholarly Communications Librarians
  - Digital Preservation Task Force published 3 NASIG Guides
  - Publishing related sessions are included in the 2018 conference program
- Enhance benefits for commercial vendors
  - Revised organizational membership
  - Simplified sponsorship form and tiers
  - Closer collaboration with UKSG
  - Strategic affiliate relationship with Library Publishing Coalition (LPC)
  - NASIG has a representative on the SSP Initiative on Diversity and Inclusion in Scholarly Communications - C4DISC
  - Explored ties with ALCTS, FORCE11
  - Strong outreach to more vendors, sponsorships increased this year
- Explored options for improved access to conference proceedings
- Switched to Zoom, cheaper and more functional
- Moved up timing for conference proposals

#### Financial report, presented by Michael Hanson, Treasurer

Equity has gone down from \$555,964 in May 2016 to \$473,737 in May 2018. This is largely because of the losses incurred at the 2017 conference, which were due to lower attendance numbers and reduced registration income. Also, hotel costs and audio/visual costs were higher in Indianapolis than in Albuquerque.

Investments are doing well at \$276,274 (April 2018). This is an increase of \$11,000 from April 2017. This is

significant considering investments were nearly wiped out after the 2008 financial crisis.

**Introduction to the 2018-2019 Board, presented by Erika Ripley, Nominations & Elections Committee chair**

- President: Angela Dresselhaus
- Vice President, President-Elect: Kristen Wilson
- Past President: Steve Oberg
- Secretary: Beth Ashmore
- Treasurer: Jessica Ireland
- Member-at-Large: Karen Davidson
- Member-at-Large: Maria Hatfield
- Member-at-Large: Lisa Martincik
- Member-at-Large: Marsha Seamans
- Member-at-Large: Steve Shadle
- Member-at-Large: Ted Westervelt
- Editor-in-Chief, NASIG Newsletter (Ex Officio): Lori Duggan
- Marketing & Social Media Coordinator (Ex Officio): Eugenia Beh

**Recognition of Outgoing Board Members and Committee Chairs, presented by Del Williams, Awards & Recognition Committee chair**

Board:

- Past President: Anna Creech
- Secretary: Kelli Getz
- Treasurer: Michael Hanson
- Member-at-Large: Betsy Appleton
- Member-at-Large: Chris Bulock
- Member-at-Large: Adolfo Tarango
- Editor-in-Chief, NASIG Newsletter (Ex Officio): Kate Moore

Committee Chairs:

- Awards & Recognition: Del Williams
- Bylaws: Kate Seago
- Communications: Melissa Cantrell and Heidy Berthoud
- Conference Coordinator: Anne McKee
- Conference Planning: Sarah Perlmutter and Marsha Seamans
- Continuing Education: Xiaoyan Song and Rachel Becker
- Evaluation & Assessment: Michael Fernandez
- Membership Services: Pat Adams

- Mentoring: Trina Holloway
- Nomination & Elections: Erika Ripley
- Proceedings: Kristen Wilson
- Program Planning: Violeta Ilik
- Registrar: Karen Davidson
- Standards: Mark Hemhauser
- Student Outreach: Todd Enoch

**Vote to approve changes to Bylaws, presented by Kate Seago, Bylaws Committee chair (paper ballots to be distributed at the forum)**

An in-person vote occurred. Ballots read:

**VOTE:** The Bylaws Committee has recommended the following changes to the NASIG Bylaws:

- Adding (for-profit or not-profit) after organizations in Article III, Sect. 1 second sentence
- Changing the name of the Nominating Committee to the Nomination & Elections Committee;
- Clarification on the terms and appointments of NASIG committee members; and
- Changing the number of votes required for passing bylaws changes in an online vote from a majority of all membership to a majority of those voting.

The motion passed with 96 votes in favor and 1 opposed. The motion passed and the bylaws will be updated.

**Discussion of old business, presented by Parliamentarian (Christie Degener)**

There was no old business to discuss.

**Call for New Business, presented by Parliamentarian (Christie Degener)**

Steve Oberg offered an apology for the insensitive/derogatory remarks made by the opening session speaker during the opening session as well as on Twitter afterwards. He asked for a discussion of feedback, concerns, and issues regarding the event. Comments/suggestions include:

- There was a question of how to move forward and a suggestion of creating an equity and diversity

**2018 Conference Evaluation Report**  
**NASIG 33<sup>rd</sup> Annual Conference**  
**Transforming the Information Committee**  
**June 8-11, 2018**

2018 Evaluation and Assessment Committee:  
Michael Fernandez (Chair), Esta Tovstiadi (Vice-Chair),  
Clint Chamberlain, Melody Dale, Tim Hagan, Preston  
Livingston, Trina Nolen, Diana Reid, Derek Wilmott

The 33rd Annual NASIG Conference was held in Atlanta, Georgia. The conference offered four pre-conference workshops, three vision sessions, thirty concurrent sessions, one “Great Idea” showcase with thirteen presentations, a student spotlight session with four speakers, a snapshot session with six presentations, and a vendor expo. Other events included an opening reception, first-timers’ reception, vendor lightning talks, and informal discussion groups.

There were 149 surveys submitted from 317 conference attendees. Survey respondents could enter a name and email address for a chance to win a \$50 Amazon gift card. Gregory Yorba from California State University – Fullerton was the winner.

Below is a summary of the survey results.

### **Conference Rating**

Respondents were asked to give ratings on a Likert scale of one to five, with five being the highest. The overall rating of the 2018 conference was 4.29. This was a decrease, albeit a small one, from the overall rating of 4.33 in 2017, and the second year in row that the overall rating decreased. The rating was comparable to the similar 4.28 rating of 2015.

officer to vet speakers or a diversity award to bring more diversity to the conference.

- Opening session speakers need to be briefed ahead of time.
- Individuals felt uncomfortable and are reconsidering an organization where members treat each other in a rude way.
- CPC chairs aren’t always based in the conference location, so it can be difficult for them to find speakers if they are not in the area.
- There was appreciation of the prompt response from the Board.
- The code of conduct that we have now has regulations, but it lacks the process of dealing with infractions.
- A Code of Conduct Committee could be formed.

There was a discussion about conference costs. NASIG is working hard to contain the costs, but food and beverage, hotel, and audio/visual costs continue to increase rapidly. Food and beverage costs were \$280 per person at this conference. The NASIG Board will continue to monitor costs and implement cost-savings measures, but it is possible that membership dues and/or conference registration might need to be adjusted in the future.

One recommendation included reaching out to vendor sponsors for additional sponsorship money, leveraging vendors to help negotiate hotel costs, and reminding vendors to support NASIG due to NASIG’s non-profit status.

Would conference rotation between a smaller group of sites save money? The cost savings would be in-direct and include saving on CPC’s labor and audio/visual company labor but will likely not amount to a significant direct cost-savings. There could be some hotel savings if the same hotel chains are used and less of a chance of surprise hotel bills.

Personal members can donate to NASIG as well as other library organizations or employers.

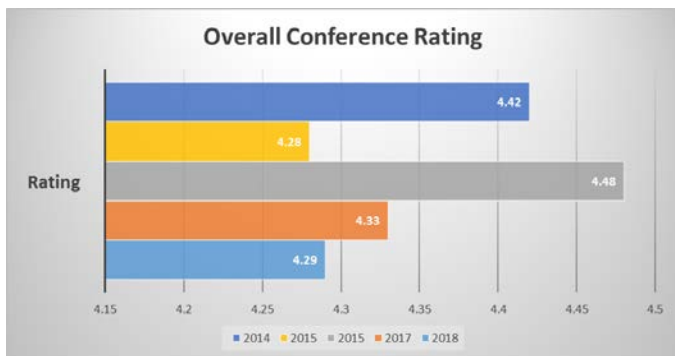
### **Adjourn**

The meeting was adjourned at 5:33 pm local time.

Minutes submitted by:

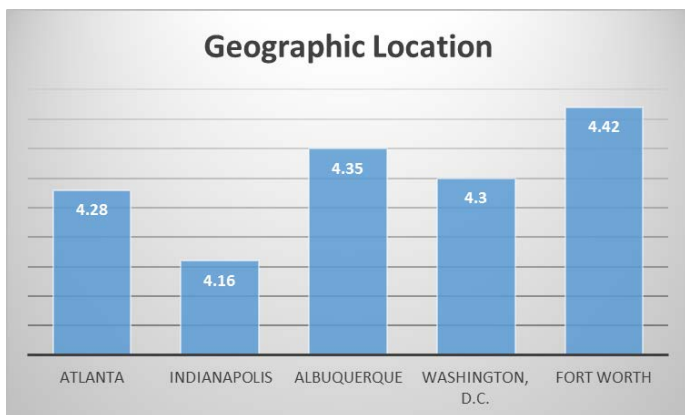
Kelli Getz

Secretary, NASIG Executive Board



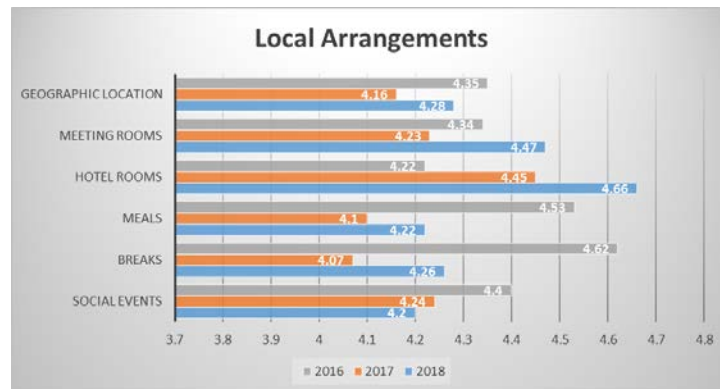
**Figure 1.** Overall conference satisfaction rating.

In terms of geographic location, Atlanta was rated 4.28, nearly identical to the overall conference rating of 4.29. This was an increase of the 2017 location of Indianapolis, which rated a 4.16.



**Figure 2.** Satisfaction with conference location.

51 respondents commented on the facilities and local arrangements. Many noted the lack of vegetarian meal options and breakfast options overall. The hotel facilities were generally regarded highly with many praising the hotel staff. The hotel’s accessibility by public transportation was also appreciated by many respondents who were able to conveniently travel there directly from the airport.



**Figure 3.** Satisfaction with local arrangements.

95% of survey respondents used a mobile device during the conference. The most common uses of mobile devices during the conference were to look up schedule and room information, take photos, and post on social media.

### Program Descriptions, Online Conference Information, and Schedule

The vast majority (85%) of survey respondents rated the layout and explanation of programs a 4 or higher with 55% assigning a rating of five.

A majority (52%) rated the usefulness and design of the online conference information to be a 5, with an overall weighted average of 4.33. Several respondents praised the Sched app in their comments.

The overall scheduling of the conference was met positively, with a majority of the respondents agreeing or strongly agreeing that the right amount of time was left for breaks (91%), programs and sessions were the appropriate length of time (95%), and that the conference was well-paced throughout without feeling rushed or leaving too much unstructured time (87%). One scheduling issue that was noted by multiple commenters was the Saturday evening dine-arounds, which began immediately after the late afternoon sessions, forcing many attendees to leave the Student Spotlight Session and Great Idea Showcase early.

## **Pre-Conference Workshops**

The four pre-conference workshops received weighted averages ranging from 4.06 to 4.38. Comments were generally positive though it was noted that the Friday workshops overlapped with the user group meetings.

## **Vision Sessions**

Three vision sessions were a part of the 2018 conference. The average overall ratings for the sessions ranged from 3.99 to 4.33. Sören Auer's presentation was well-received for a topic that many respondents noted was new to them. Many respondents commented on the thought-provoking nature of Lauren Smith's presentation on equity of access. Lisa Macklin's presentation on open access was highly-regarded and generated several comments on its relevance and practicality.

## **Other Sessions**

NASIG 2018 offered 30 unique concurrent sessions. 24 of those (80%) received an overall rating of 4.0 or higher. The number of sessions offered was higher than last year's conference in Indianapolis. Most comments were positive, or offered specific, constructive criticism of an individual session. The Evaluation & Assessment Committee distributed individual feedback to presenters upon request.

As in previous years, the 2018 conference offered a session for Vendor Lightning Talks, featuring ten individual talks. This session was not evaluated.

This year's Great Idea Showcase consisted of 13 unique presentations, higher than the seven presentations in 2017. The weighted average for these ranged from 4.0 to 4.38. The Showcase did not generate many evaluation comments, though several respondents used this section to note the scheduling conflict with the Saturday dine-arounds.

There were four student spotlight sessions, with weighted averages from 4.28 to 4.62. The comments

were largely positive, with many respondents advocating for a more prominent timeslot to showcase student work at future conferences.

The 33rd conference marked the fifth year of the Snapshot Session, "designed for 5-7 minutes talks in which projects, workflows, or ideas are presented." The session consisted of six presentations, with weighted averages from 3.39 to 4.20. The ratings on these skewed lower, with four of the six presentations receiving lower than a 4.0.

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

## **Opening Reception**

The opening reception at NASIG 2018 received a rating of 3.73. The 2017 opening reception was rated at 4.10. The opening reception speaker, David Bradley, generated much dialogue for an overview of Atlanta history that was widely found to be problematic and insensitive. A more detailed summary of responses will be submitted to the board. While many comments took note of the problematic nature of the speaker's comments, several also showed appreciation for the timely statement of apology issued by NASIG. The conference survey did not include an individual rating for the speaker, so the overall rating of 3.73 represents the opening reception as a whole, including meals and activities.

## **Events**

The First Timers Reception received a rating of 4.17. An overwhelming 90.32% would like to see this event continue. Comments submitted about the event were generally positive.

The Members Forum, formerly known as the Business Meeting, received a rating of 4.23. Respondents were appreciative of the budget transparency as well as the

opportunity to share a dialogue in the wake of the opening speaker’s controversial remarks.

The Vendor Expo received a rating of 4.10 with the majority of survey respondents (85%) wanting to see it continue.

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

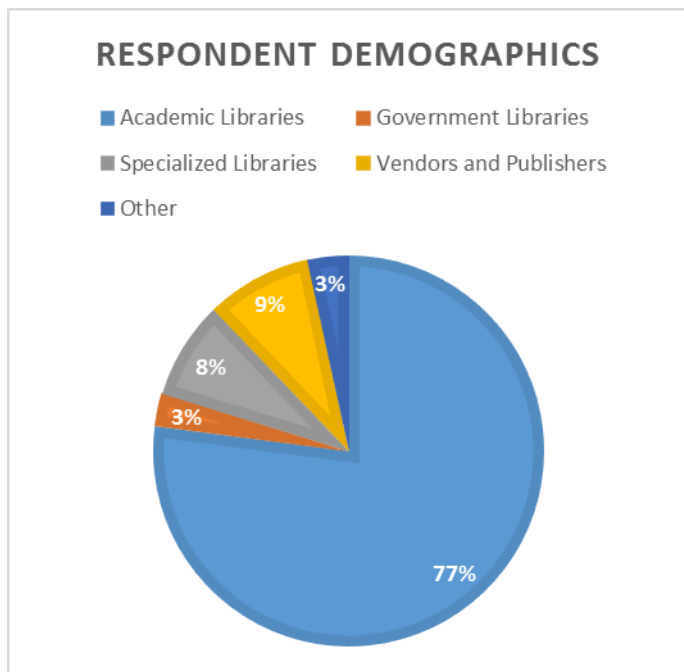
As in previous surveys, academic library employees continue to represent the largest group of respondents at 77%. This is a slightly higher percentage than was held by academic libraries for the 2017 conference at 74%.

As in previous surveys, academic library employees continue to represent the largest group of respondents at 77%. This is a slightly higher percentage than was held by academic libraries for the 2017 conference at 74%.

**Figure 4. Respondent demographics.**

Respondents were asked to “describe your work” using as many of the 30 given choices as necessary (including “other”). For the fifth consecutive year, “Electronic Resources Librarian” garnered the highest number of responses (64). Serials Librarian (51), Catalog/Metadata Librarian (43), Acquisitions Librarian (38), and Collection Development Librarian (29) round out the top five responses.

When asked about the number of years of professional experience, “11-20 years” received the majority at 47 responses.



<sup>1</sup> To ease the reading of the demographic chart, several categories offered on the survey were condensed:

- Academic Libraries contains: College Library, Community College Library, University Library
- Specialized Libraries contains: Law Library, Library Network, Consortium or Utility, Medical Library

- Vendors and Publishers contains: Automated Systems Vendor, Book Vendor, Database Provider, Publisher, Subscription Vendor or Agency
- Other contains: Public Library, Student

Several other categories were available, but not selected by a survey respondent.

### *Pre-Conference Workshop*

#### **Introduction to Serials Cataloging with RDA**

Steve Shadle

Reported by Dawn Rapoza

In this pre-conference workshop, Shadle led participants through the Serials Cataloging Cooperative Training Program (SCCTP) curriculum for cataloging serials with the Resource Description and Access (RDA) standard. In-depth discussions focused on applying CONSER-required core functions and elements for cataloging serials in a MARC environment, including identifying the mode of issuance and preferred source of information, determining the frequency of publication, constructing authorized access points, transcribing versus recording data, linking relationships and applying the principles of Functional Requirements for Bibliographic Records (FRBR) to descriptive cataloging. Key sections of the RDA Toolkit and Program for Cooperative Cataloging (PCC) policies applicable to serials cataloging were also referenced and discussed.

The elements of a serials MARC record were examined in detail, as well as identifying and managing the differences between major and minor title changes. Practical hands-on exercises enabled participants to apply and discuss the principles presented for descriptive cataloging, cataloging with copy, and bibliographic maintenance.

### *Conference Sessions*

#### **An Ongoing Treasure Hunt: One Library's Practical Experiences Documenting Post-Cancellation Perpetual Access**

Nancy Donahoo and Arthur Aguilera

Reported by Shannon Keller

Nancy Donahoo, Serials Manager, Albertsons Library, Boise State University, and Arthur Aguilera, MLIS student, University of Washington, and administrative assistant, Albertsons Library, Boise State University, detail their experience tracking and exercising their post-cancellation access (PCA) rights to electronic journals at Boise State University. Donahoo gave background details for the reason behind their need to track and enable PCA rights. She explained that her library has had to cancel large big deal packages in favor of selected title subscriptions. These cancellations caused the library to have to update its holdings and access information to reflect updated PCA terms. Donahoo then described how Integrated-Library-System (ILS) migrations, consortial purchasing, and the lack of titles listed in packages deals created difficulty in confirming PCA rights on a title-by-title basis. Managing these variables and investigating PCA necessitated the creation of a new workflow and documentation best practices at their library. Aguilera detailed the three-phase process he used to confirm and exercise PCA rights:

1. Verify online access by comparing scope notes from the vendor with actual online access and using Excel spreadsheets to collect and organize information.
2. Update records in both the ILS and OCLC with the decision to include a local PCA note in the e-journal catalog record 999 field. This decision made their catalog record the version of record for recordkeeping purposes.



3. Further researching titles in licenses, former contacts, old order records, and former consortial agreements to find out how far back PCA really is included for a certain title.

Both Donahoo and Aguilera bemoaned that this work is manual and requires significant staff time. They recommended the following: create a PCA rights policy and workflow, work closely with vendors to create greater collaboration in documenting PCA rights, and fine tune record keeping for documenting PCA rights so that libraries may be better suited to exercise them when needed.

### **Applying Statistical Methods to the Library Data Analysis**

Yongming Wang and Jia Mi

Reported by Matt Jabaily

Yongming Wang and Jia Mi, both from the College of New Jersey, presented on the application of statistical methods to library usage data. To encourage other librarians to apply similar methods, they walked participants through two example projects, showing how they had gathered the data, performed the analyses, and interpreted the results. They performed their analyses with R, a free open-source software environment for statistical computing, and RStudio, a free open-source development environment for R.

For their first project, they applied a simple linear regression model to analyze their monthly full-text downloads from EBSCO's Academic Search Premier, their most popular database. Simple linear regressions are used to model linear relationships between a dependent variable and an independent variable. In this case, they used R to perform a time series analysis, plotting changes in the number of monthly downloads over the past eight years. The results showed a consistent downward trend in full-text downloads. As part of the demonstration, they showed the commands used in R to perform the analysis. They also explained how R could be used to measure the extent and statistical significance of the decline in downloads.

For the second project, they used the Pearson correlation coefficient, which measures the degree of relationship between two continuous variables. In this case, they measured the relationship between the number of full-text downloads for journal titles at their institution and the impact factors of those journals. The presenters showed how they created a scatterplot of the data and performed the correlation test, reminding the audience that correlation did not imply causation. The results indicated a significant, positive relationship between downloads and impact factors, but there was some question as to the strength of the relationship.

In closing, Wang and Mi discussed the benefits of discovering the relationships between variables in better understanding trends in library data. In the future, they hope to collect more data and use more advanced models. In response to questions from the audience, they noted that they hoped to share their data with others in their library to help in decision making.

### **Bringing Social Justice Behind the Scenes: Transforming the Work of Technical Services**

Heidy Berthoud and Rachel Finn

Reported by Amy Carlson

Libraries are not neutral. What we do and how we do it is based on choices and recognized or unrecognized bias. This presentation explored and encouraged us to acknowledge those choices and to take honest and thoughtful views of our work and librarianship. Heidy Berthoud and Rachel Finn, both of Vassar College, presented their approach to incorporate social justice into technical services and collection development at their library.

In fall 2017, Berthoud created the Diversity, Inclusion, and Social Justice (DISJ) Working Group. Co-chaired by Finn and Berthoud, the group is charged with reporting existing efforts and new opportunities to manifest the values of diversity, inclusion, and social justice within the library. Influenced by the Diversity, Inclusion, and Social Justice Task Force at the Massachusetts Institute

of Technology and primed to think about social justice in all aspects by the Engaged Pluralism Initiative at Vassar, a Mellon-funded campus-wide program, the DISJ Working Group works toward engaged pluralism. They propose changes in three areas: updating the library's mission statement, conducting an internal climate assessment, and creating inclusive spaces.

Berthoud outlined the ways in which she infuses social justice into her work. By their nature, zines contain narratives and visuals which counter normative materials and require new processes. Berthoud balances this patron-centric work with the traditional efficiencies in a technical services department. Ethical acquisitions, or purchasing directly from the content creator or from an independent source, is one way. They have a plan in place for the fall to purchase more content from local and independent vendors. She suggested being open about costs and cuts with faculty.

Web-scale discovery is another area to make an impact. Here, Berthoud experimented with her zine collection to counteract the problems with Library of Congress Subject Headings. Students should be made aware that we organize and describe resources that privilege certain groups—male, white, heterosexual, cisgender, able-bodied, Western, and Christian—at the cost of others. Familiar words and phrases are absent from this official classification system. Berthoud overcomes these obstacles and improves discoverability utilizing these methods: using vernacular keyword-based summaries; using alternate thesauri and/or term choices that will enhance access; creating local headings when needed; and including content and/or trigger warnings. She is collecting data from students to expand this work to include the main collection.

Finn concentrated on collection development theory and decolonizing our collections. Librarians wield great powers: to name, to organize, to provide access to knowledge. In academic libraries, we have the power to influence and shape students and future scholarship. Due to this, Finn delved into collection development theory and found greater scholarship on practice. She encouraged a thoughtful approach to how we collect,

what we bring in for our students, and what we provide access to. While Berthoud concentrated on practice in her part of the talk, Finn addressed the collection development theory aspect underlying the practice.

Can we determine collection development theory to decolonize collection development practice? Decolonizing practice refers to laying bare the dominant structures we encounter in librarianship. Guiding principles could shape our processes throughout the library: collection development, technical services, acquisitions, and cataloging. But enlightened, progressive, and radical thought may be more appealing to us than the actual work involved. Painful realizations about who and what we are may result from that process of “walking the talk.” Professionally, it requires us to examine our roles in maintaining the status quo, which shore up the hegemonic structures that libraries and archives reinforce through traditional practice.

Understanding the truth about libraries is the first step. We must recognize that libraries aren't for everyone and are not neutral entities. They are meant to create and maintain an informed citizenry. We work to address these issues in many of our libraries, but fundamentally this is their foundation. The profession is predominantly white and middle-class. Finn pointed out that any discussion of diversity in a homogenized group of people or institution, such as many libraries, results in 'diversity' meaning a deviation from the norm without even realizing it. This, in turn, reinforces dominant structures through compartmentalizing diversity. We must contend with those structures and the idea of diversity as deviating from the norm in order to have conversations about effectively importing social justice into librarianship or decolonizing collection development. This work should be done at both the individual and institutional levels.

Librarians significantly influence and control the selection, organization, preservation, and dissemination of information. We belong to a profession explicitly committed to intellectual freedom and access to information. Aiming a critical lens on institutional aims, missions, and visions will help us to be more inclusive in

what we do. Finn noted that this is one of the goals of the DISJ Working Group. Part of this process entails unlearning what we've learned, will cause upheaval, and may not have a specific end—this is what constitutes decolonization of our minds. Finn gave an example of her concentric collection development approach, which embodies some of these theories into practice. By holistically approaching the collection areas and drawing from multiple disciplines, she widens the perspective.

An audience member asked if the removal of monuments is symbolically related. Finn suggested that those processes certainly could begin conversations. Another audience member asked whether more money or more time is needed with the zine collection, and Berthoud responded that she needed more staff.

### **Collection Management, Assessment, and Development: Reviving Collections During LMS Implementation**

Erin Ridgeway

Reported by Chris Stotelmyer

Erin Ridgeway is the Electronic Resources and Periodicals Librarian at Southwestern Oklahoma State University (SWOSU) Library. Ridgeway left her position in public services to tackle the implementation of OCLC's WorldShare product after the librarian previously in the position retired. Ridgeway, two staff members, and three students managed the implementation from January to August 2017. The migration process uncovered several issues with journal and microform catalog records. These issues, combined with several external pressures, necessitated a daunting collections assessment project in the middle of the WorldShare implementation.

SWOSU Library has used the Voyager ILS from Ex Libris since 2003. Voyager has been around for decades and Ex Libris has moved to newer, cloud-based systems, and will eventually cease maintenance on the older product. SWOSU's collections have grown substantially since 2003 creating more and more data for the Voyager

system to house. A renovation project for the floors in parts of the library was announced prior to the implementation. The renovation would require bound periodicals to be stored elsewhere in the library or offsite. Space was also needed for a donated archival collection donated to the library.

Librarians familiar with an ILS migration remember the initial reports from the new service describing inconsistencies and errors found during the switch. Ridgeway's team found tens of thousands of unmatched barcodes for bound journals and other serials. Additionally, thousands of microforms suffered from mapping errors or had never been assigned a location at all. Ridgeway cited the large number of people working in SWOSU's Voyager system since 2003, often with minimal training, and Voyager's complexity, and lack of maintenance as the primary culprits for these errors.

Faced with thousands of issues and a limited time to address them, Erin and her team had to make some tough choices. The flooring work and the new archival collection required moving heavy bound journals and microform cabinets back and forth to temporary housing. However, correcting the many mistakes associated with these collections by hand would have been impossible. The collections were due to be weeded anyway so the team began the process of withdrawing items and sending them off to be recycled.

They cross-referenced their electronic journal holdings with the physical to ensure adequate coverage and discarded the oldest materials. (The largest program on campus is nursing and those instructors prefer articles within the last five years.) They checked usage, looked at cost and overlap of collections, and all of the things involved in electronic resources collection development. The most difficult part of the process, however, was negotiating with liaison librarians to let go of collections in their subject areas. A few rare microform collections are still in Ridgeway's office.

## **Cooperative Cataloging Projects: Managing Them for Best Results**

Charlene Chou and Steve Shadle

Reported by Elizabeth Miraglia

Steve Shadle and Charlene Chou presented on managing cooperative cataloging projects. They went over factors that should be considered before taking on cooperative projects such as the size and scope of the collection, the language skills needed, what sort of staffing and organizational support would be needed, and how the records and metadata would be processed. Shadle discussed the Open Access Journal project, otherwise known as DOAJ, that has been an annual CONSER project since 2010. The project was borne out of a desire to increase e-journal record creation in the CONSER database. DOAJ was selected because the resources were Open Access, peer-reviewed, and had significant use. In order to ensure as much participation as possible, there is a need to keep barriers to participation low: each year an initial survey goes out to member libraries who are able to set their own language and volume capabilities, ensuring that no one library is asked to do more than they are able or willing. This year marked the first year that the project allowed MSC coding for libraries who felt comfortable providing descriptions in more difficult languages (Indonesian was cited in particular) but who did not have the capacity to complete authority work for full PCC encoding.

Chou presented several Chinese language cooperative cataloging projects. The Dacheng Old Periodical Database Project has helped to create records for a large Chinese language periodical database. The records start with brief bibliographic records created using provider-supplied metadata in a spreadsheet. Due to a number of metadata issues, the project is currently on hold, but there are plans to continue in the future. Fuller records will be created and contributed to OCLC. The plan is to have the full database available through Collection Manager when it is finished. This session also discussed the goals of the Council of East Asian Libraries (CEAL) to engage in more cooperative cataloging projects in the future. There is a focus now

on engaging with standards organizations, and CEAL has already made recommendations to NISO concerning retaining both vernacular and transliterated titles in records. They also hope to engage more with the CJK CONSER funnel to create more high-quality records for CJK serial titles. Lastly, CEAL aims to become even more involved with educating and fostering communication with vendors to hopefully ensure better metadata in the future.

## **Cultivating TALint: Using the Core Competencies as a Framework for Training Future Information Professionals**

Marlene van Ballegoie and Jennifer Browning

Reported by Sofia Slutskaia

Marlene van Ballegoie and Jennifer Browning of the University of Toronto libraries spoke about TALint: the Toronto Academic Libraries Internship. The TALint program, based on the principles of the workplace integrated learning, gives students the opportunity to enhance the quality of their learning through real workplace experience and bridges a gap between graduate education and workplace expectations. The TALint program is a collaboration between the University of Toronto Libraries and the University of Toronto iSchool. Currently enrolled iSchool students, selected through a competitive process, work at the University of Toronto Libraries 15 hours per week for up to two years. The program currently enrolls 30 interns.

The presenters discussed the metadata management unit approach to working with TALint interns. The first students were hired in 2017 to help in providing e-resource access and in troubleshooting e-resource problems. The decision was made to use core competencies for electronic resources librarians as a framework for student training and as a tool to document students' development during the program. The presenters provided specific examples of how various core competencies were integrated in the students' learning agendas, training plans and work assignments.

The unit decided that student learning agendas, that are required by iSchool and are created in collaboration with the workplace supervisor, can be incorporated in the unit internal wiki used for documenting the unit's policies and procedures. The students' wiki spaces were private and only visible to students themselves and their workplace supervisor. Each student's space in the wiki contained four columns. The first column listed competencies as they appear in a NASIG document. The second column highlighted relevant resources such as articles, webinars and workplace documentation. Both students and workplace supervisors could use the third column to record the tasks and projects related to each competency. The final column was used for students to reflect on what they learned.

The approach is very useful as it offers background information for each competency and helps to measure progress for both the student and the mentor. Presenters went into more detail about students' learning tools and skills related to each competency. For example, as part of achieving communication competency, reciprocal sharing was encouraged to give students opportunities to present their classroom projects to the library staff. Students were also encouraged to create documentation and procedures in a team's wiki space. The other example was asking students to act as project managers for discreet projects at the same time they were taking a project management course. The presenter concluded by discussing the benefits of incorporating core competencies in working with students from the TALint program.

They listed such benefits as increased employability, improvement in both technical and soft skills, help in clarifying career paths, and in developing professional identity. The presenters' observations were supported by quotes from students who reported feeling more prepared to enter the workplace and having much better understanding of their field. The presenters also addressed their plans for the future and encouraged other departments and libraries to consider using relevant core competencies documents as a tool for skill

development for both student interns and staff members.

### **Digital Preservation Task Force Update**

Shannon Regan Keller, Wendy Robertson, and Kimberly Steinle

Reported by Dawn Rapoza

In this session, the presenters provided updates on the Digital Preservation Task Force's work and discussed recent developments in the field of digital preservation. The presenters introduced the origins of the task force: it was influenced by a vision presentation at the 2015 NASIG Conference. Keller and Robertson discussed projects in which the task force is engaged such as advocating for e-journal content preservation and expanding conversations with publishers to inform them of libraries' needs to preserve electronic content for their collections. Keeper's Registry is used at their institutions to conduct preservation analysis of electronic journal title holdings.

The presenters described tools and resources that the task force is developing to make available on the NASIG website for use by librarians, publishers, third party preservation agents and other interested parties. The tools include "Digital Preservation 101", a guide to Keeper's Registry, and talking points and questions to discuss with publishers about digital preservation. Keller and Robertson highlighted some integral questions related to communicating with publishers such as: Do contracts (including those with societies) make provisions for providing perpetual access to paid content through archiving service, including supplementary materials? How is integral content differentiated from additional content with regards to preservation and perpetual access?"

Steinle's portion of the presentation focused on Duke University Press' use of an in-house platform for preserving content digitally, third-party partnerships with LOCKSS, CLOCKSS and Portico, and other preservation partnerships. Among the preservation partnerships that she discussed was Project Euclid, a

project with Cornell University, and the challenges associated with it. Steinle also discussed challenges associated with making archived content usable such as maintaining print copies, working with multiple platforms for different types of content (e-journals and e-books), sharing metadata with discovery partners, and the costs associated with preservation. Duke University Press is considering how digital content can be preserved to deal with some of these challenges.

The task force is currently developing a survey to determine the best use of their efforts and NASIG's efforts in digital preservation. A future project under consideration is collecting examples of digital preservation statements and policies from various institutions and sharing them through NASIG.

### **Embedding Collective Ownership into a Systems Migration**

Paige Mann and Sanjeet Mann

Reported by C. Derrick Hiatt

This was not the typical systems migration presentation. Scholarly communications librarian Paige Mann and systems librarian Sanjeet Mann, from the Armacost Library at the University of Redlands, did not focus on the mechanics of the migration. They did not tell the audience which integrated library system modules migrated well and which ones did not. Nor did they describe how the new system led to workflow changes. Instead, the presenters described how the library organized the migration effort in a way that involved the whole library and gave the entire staff a sense of ownership in the outcome.

Recognizing the magnitude of change that a system migration would bring, the Armacost Library's leadership team took deliberate steps to minimize the negative experiences sometimes associated with significant change. The library sought to make the migration a collaborative project and to maintain individuals' agency by involving everyone in decision-making.

To manage the migration, the library organized three teams that handled specific parts of the project. All library employees served on at least one migration team and individual workloads and strengths were considered when establishing teams. Each team had a core of "insiders"—experts in the team's area of responsibility. There were a few "outsiders"—people whose regular work was not directly related to that team's specific focus so they could offer new perspectives and questions. Teams also included at least one or two people from each of the other teams to serve as bridges to the other teams' work. Library leadership tried to emphasize that everyone was learning at the same time. This helped staff members feel safe taking an active role in learning and decision making.

Paige Mann described some approaches to team meetings that had helped improve participation and productivity. One team started its first meeting with a card game, which established an expectation of team members sitting around a table (not spread across the room) and interacting. Paige suggested assigning homework in every meeting so that team members are more prepared for migration. Meeting agendas should also be provided a week in advance. She also suggested discussing foundational principals with the group, such as the following:

- Each person has something to contribute.
- Fear and anxiety are normal.
- Support one another and make room for mistakes.

Sanjeet Mann discussed the importance of learning as a part of the system migration process: "A willingness to learn continuously and collaboratively is perhaps the single greatest attribute needed for collective ownership to succeed." Learning is iterative, and we should value unsuccessful experiences as learning opportunities. Consider how to build into our processes a safe place to fail and to learn. We should also learn collectively and make big decisions as a team, relying on different people's strengths.

## Ethical Dilemmas in Collection Development of Open Access Electronic Resources

Amanda Echterling

Reported by Maria Aghazarian

In this session, librarian Amanda Echterling discussed some of the unique ethical dilemmas she has encountered in her role as the head of licensing and acquisitions at Virginia Commonwealth University (VCU) Libraries. Echterling began the discussion by sharing the framework of professional ethics and addressing the essential task that librarians undertake in distinguishing between personal code and professional duty. In addition to the ALA Code of Ethics, ALCTS has the “Statement on Principles and Standards of Acquisitions Practice” for acquisitions librarians.

Echterling also acknowledged that while many librarians agree that collection development is important for Open Access (OA) resources, very few libraries implement practices for OA resources or include them in their general policies. OA is merely regarded as a format or business model, and libraries are supposedly business model agnostic. Echterling, however, presents two compelling cases which pit ethics against compliance with professional ethics and best practice compliance.

VCU has an OA article processing charge (APC) fund for faculty authors. The APC funding model for OA has created an imbalance of power between publishers and authors. Echterling says that in our rush to OA, we have established a consumer marketplace; publishers, in their stress to manage these transactions, are setting the rules for engagement and how they collect their money. Publishers set random, undisclosed terms that lack transparency; some publishers expect one-week turnaround for payment and will charge extra for receiving late payments or issuing invoices. Other publishers, such as Nature/Palgrave, will call debt collectors for unpaid APCs. Librarians have the opportunity and responsibility to push back against unfair practices in this area.

Another questionable business model Echterling highlights is when the library was approached by commercial entity Reveal Digital to contribute seed money for an OA venture—digitizing Ku Klux Klan (KKK) newspapers. The goal of the project was to create a comprehensive database of KKK newspapers that would convert to OA after an embargo of a few years. Libraries that contributed materials or funding would be able to have access before the project went OA. Echterling highlights several reasons this was problematic. The website does not contain any editorializing or contextualizing for the materials that it presents, but rather uses sales-pitch language. The extent of anti-Klan voices is limited to two newspapers. The materials being digitized showed the KKK in a positive light that only served to showcase white supremacy rather than the diversity and dissent promised by Reveal Digital. Echterling could not in good faith support a project that made voices of white supremacy OA while voices of dissent remained behind paywalls. This presented a conflict in the framework of professional ethics.

Echterling urges librarians to give more scrutiny to OA projects, especially when libraries are called upon to be funders. Investigate the project rather than taking vendors at their word, and hold editors of projects accountable for corrections and necessary context. Librarians need to think about OA as more than a format or business model. A very engaging question and answer session followed.

### **From Content Creation to Content Delivery: Partnering to Improve E-Book Accessibility**

Melissa Fulkerson, JaEun Ku (Jemma), Jill Power, and Emma Waecker

Reported by Megan Kilb

Emma Waecker of EBSCO began the session, providing a definition of accessibility: designing products, devices, services, and environments for people with a range of disabilities, including vision, hearing, mobility, learning, or cognitive disabilities. Given population trends, we are likely to face an increased need for accessible online

materials. E-books are most accessible when content creators and platform providers prioritize it as part of normal production workflows. Content creators can include semantic tags for document structure and tables, provide alt-text with images, and choose e-pub formats over PDFs to make their content more accessible. In turn, platform providers can ensure ingest pipelines preserve features added by content providers, include meaningful structure on webpages, and develop and test assistive technologies for their platforms. Internally, EBSCO conducts staff training across the organization to raise awareness around accessibility issues. Externally, they work with publishers to incorporate more accessibility-friendly features into the content publishers create, and they also solicit feedback from users who represent various disabilities.

Melissa Fulkerson from Elsevier detailed how their workflows and culture support accessibility. Elsevier requires authors to include tags and captions on all images, they use third-party vendors to generate e-pub files and create written scripts for all supplementary media content. Looking ahead, Elsevier is working to achieve greater buy-in among all stakeholders for the e-pub format, since it is more accessible than PDF. They also hope to include alt-text in all products across their portfolio, which represents both their biggest opportunity in terms of impacting users, and challenge, because of the large volume of content. Externally, Elsevier is refining its VPAT service, while internally, they launched a staff training program to expand awareness around accessibility in all position types across the company, from technologists to copy editors and acquisitions editors.

Jill Power from EBSCO Publishing described best practices, tools, and processes EBSCO uses to test their platform. She pointed to several automated online tools such as browser extensions in Chrome and Firefox, HTML Codesniffer, and Deque Corporate's aXe. These automated solutions are a good starting point, but since they typically detect less than half of all accessibility obstacles, manual testing is usually necessary to check for issues such as the tab order of content on the page, re-sizing issues when zooming in or out, headings, and

other landmarks related to the page structure, and the content within alt-text for figures and images.

JaEun Ku from UIUC detailed accessibility challenges in the library environment: multiple e-books platforms to maintain and support, multiple content types to consider, and a lack of expertise among developers and staff. To engage these challenges, UIUC has implemented some strategies to prioritize accessibility for departments across the library. Before gaining access to the library's content management system, library staff must complete basic accessibility training. Additionally, staff in the library's in-house publishing program work closely with content creators to ensure content is "born accessible" to minimize post-publication clean-up. They also rely on the university's A11y First Editor, a web editor designed to build accessible webpages.

## **The Future of Cataloging in a FOLIO Environment**

Natascha Owens and Christie Thomas

Reported by Sanjeet Mann

The Future of Libraries is Open (FOLIO) is an open-source, extensible library management system (LMS) platform attracting attention throughout the library world for its innovative approach to library management and broad range of development partners, including libraries, vendors, and commercial organizations. At this session, Natascha Owens and Christie Thomas from the University of Chicago Library provided an overview of the FOLIO community and delved into the development process for FOLIO's Inventory app that is scheduled for initial release in January 2019.

Owens and Thomas belong to FOLIO's Metadata Management Special Interest Group (SIG), one of eleven project teams that are using their functional expertise to define FOLIO's necessary functionality and give feedback to developers. Interested readers can use the FOLIO Wiki (<https://wiki.folio.org>) to follow the progress of FOLIO development that includes updates



from each SIG and smaller working groups created to tackle specific issues.

The Metadata Management SIG envisions the Inventory app as the piece of FOLIO that presents bibliographic information in a consistent, abstracted format, regardless of the original data source or content description rules. Initially the app will be able to ingest, display, and edit records and utilize authorities, working in tandem with a metadata creation app called MARCcat. The Inventory app will support bibliographic records in MARC format and holdings records in a non-MARC format. Additional formats for bibliographic records and the ability to generate MARC holdings will come later.

The app's interface is being developed through online Slack conversations and in-person workshops involving catalogers on the Metadata Management SIG, user interface (UX) designers, and software developers. Each party brings distinct skills to the table and relies on clear communication to bridge differing worldviews. Owens described the experience of explaining a cataloging workflow to a UX designer, adding that patience, willingness to ask lots of questions, and openness to rethinking assumptions are essential for this type of cross-domain collaboration.

The SIG formed temporary working groups to address specific requirements for the Inventory app, such as which data fields are needed to manage holdings and items, how to handle Resource Description and Access (RDA) resource type and format type fields, how to represent analytics and bound-with items, and the creation of the advanced search interface. Owens added that electronic resource management system functionality is in development by two German library consortia working with Knowledge Integration (the developer of KB+).

Audience members asked about the institutional commitment needed to support librarians dedicating their time to FOLIO development and sought more detail about FOLIO's support for statistics and consortial resources. Attendees also debated the function of

FOLIO's Codex, which was initially intended to be a record-searching app that would bring together results from the various FOLIO modules. The role of the Codex, much like the feature set and UX design of the Inventory app, continues to evolve through dialogue and community engagement.

## **How We Talk about Assessment: A New Framework for Digital Libraries**

Caroline Muglia

Reported by Mary Bailey

Muglia's new framework for assessment of digital libraries is based on work done for an Institute of Museum and Library Services-funded project. The project includes the University of Southern California and five other libraries spread across the United States with an advisory board from the Digital Library Federation Assessment Interest Group.

While most libraries try to access use based on publisher statistics and Google analytics to demonstrate value and write reports to show that value, some librarians had a feeling something was missing. What about the reuse, repurposing, and remixing of information? Shouldn't that count too? If so, how do you get it? What libraries are doing now does not begin to explain how users utilize or transform unique materials in digital collections. There is also a lack of standardized assessment approaches to the collection of this information. These factors all make it difficult to show the value of digital collections.

The grant team began with a survey to discover the method and reason for collecting statistics. About 40 percent of respondents indicated they collect reuse statistics that are acquired through social media metrics, alert services, and reverse image look up.

Major barriers to this type of collection include a lack of time, staff, money, standards, and expertise. There is also a lack of methodology, or worse, collecting use statistics is not a focus for the library.

The work of the project includes the goal of providing a toolkit for librarians. The group is looking into the technology and the functional requirements, and later is creating a dashboard. But more questions exist, especially dealing with privacy issues. Many more questions surfaced as information was studied from the surveys.

Key takeaways of the study at this point include cultural heritage groups needing more technology and support for technology. A streamlined assessment process is also desired. They determined that training on how and what to gather is necessary as well as increased understanding of the meaning of statistics. Common standards would be helpful in sharing information among institutions.

The grant team still has more work over the next year, but the questions being generated are helping shape a new way of showing the value of the digital collections.

### **Journal Collection Analysis and Evaluation for Outreach and More!**

Nat Gustafson-Sundell and Evan Rusch

Reported by Dave Macaulay

Evan Rusch and Nat Gustafson-Sundell presented on the Journal Collections Analysis Database (JCADB), a reporting system that efficiently consolidates a wide range of data about journal collections from a variety of sources. Rusch described how development of the system was prompted by a desire to improve the library's capabilities for journal collection analysis in general. Specifically, the library wanted to provide evaluative information about journal collections for liaison librarians to use in outreach to academic departments. Early efforts to produce reports comparing subject-specific lists of titles indexed in A&I database with the libraries' holdings, and showing how individual titles related to journal package subscriptions, proved to be time-consuming; Gustafson-Sundell came on board to help with developing a more efficient and sophisticated reporting system with better data visualization capabilities. In the JCADB "keylists" of

journal titles in a particular subject area are the organizing principle of reports that provide a broad range of information about availability, cost, usage, and impact for each journal title; these reports are supplemented by multiple tabs summarizing availability of journals and usage by provider, as well as by categories based on SJR impact factor.

Gustafson-Sundell covered the technical aspects of JCADB's workings and how it was developed. He explained that to increase the accuracy of matching the core journal keylist with the many other sources of information used in the reports, the system used all the practical match points available which are typically five different fields. The "standard title", a highly processed version of the journal title designed to maximize accurate matching with other lists by eliminating variations, is used as the primary match-point. The standard title is created in MS Excel by applying a set of Visual Basic (VBA) and Excel functions to a list of journal titles, though other methods such as OpenRefine, Python, or MySQL programming can also be used to automate the process; a Python version of the standard title processor has been developed at MSU-Mankato and is the most likely candidate for sharing with other libraries in the future. It was stressed that JCADB does not require the use of any specific tool or method to perform its data processing, data matching, and report production work.

The final portion of the presentation was concerned with the development methodology and staffing for the project. The Prototyping Project Management Life Cycle (PMLC) approach involves a succession of brief planning, development, delivery, and feedback stages that allows for lost-cost experimentation where successes could be built on incrementally. Conversely, anything that didn't work well or cheaply could be discarded. In the early stages of the project, Gustafson-Sundell worked on the project by himself, but had some assistance with a technician who was available during periods of lighter workloads. Later on, a case was made to hire a graduate assistant to work on coding, and this was the only direct cost associated with the project.

Resource costs have increased throughout the project,

but these are far outweighed by the benefits to the library, not only in terms of improved liaison service, but also in training of personnel and improved morale from participation in a successful project.

Future plans include adding support for additional types of usage data such as COUNTER JR5 reports, and for other formats such as books and ebooks; inclusion of citation analysis information; further collaboration with academic departments in determining valued titles; and development of a suite of tools that is shareable with other libraries.

## **Knowledge Management for Collection Development**

Julia Proctor

Reported by Sara Hills

Julia Proctor began a new position, Collection Services and Strategies Librarian, at Penn State University Libraries. Penn State University Libraries created the position to address a fundamental issue of knowledge management--how to ensure that institutional collection management knowledge, policies, and future directions are communicated and implemented at all locations in the present and in the future?

Because the position was new to both Penn State Libraries and the presenter, Proctor determined that learning about and thinking about her position through the lens of knowledge management would be a helpful way to proceed. Proctor provided an introductory background on knowledge management. The specific concepts in knowledge management that Proctor addressed were tacit versus explicit knowledge, the importance of creating shared meanings to build shared cognitive structures, knowledge gaps (both perceived and unperceived), and the role of communication and perception in sharing knowledge. During her introductory background on the Penn State University Library system, Proctor listed some of the issues facing the collection management team both at the branches and at the flagship University Park location. As part of her learning process, Proctor met with various

collection management stakeholders, and she shared the summary of those meetings. Staff expressed concern to Proctor that they did not have a trusted, updated source of information other than certain colleagues (acquisition staff), and they were not sure where to go to obtain information.

After these meetings with selectors, Proctor realized that much of the knowledge that she needed to communicate was tacit knowledge, which is the hardest to codify as it comes from experience and intuition. Proctor needed to find a way to streamline communication and to change how selectors found their information. She developed an action-oriented, consistent, and transparent communication plan to focus on creating shared meaning. Another key aspect of the communication plan was anticipating the knowledge gaps of her selectors, but she struggled with how to anticipate those knowledge gaps. Proctor determined that the best way to address knowledge gaps was to create an information center with static information that includes an FAQ and a revitalized intranet. She inserted information into the existing collection development workflows to address unperceived knowledge gaps.

Although Proctor has made improvements to knowledge sharing and management, she admitted it is an ongoing process. Change is endemic. Proctor presented on the importance of communication as a two-way conduit: not only was she sending information about and curating institutional knowledge, she was also learning about the institution and staff. Proctor was clear that she has her own knowledge gaps, and she is seeking to address them. For example, she is hosting selector forums as a way to meet with all selectors for a conversation. Two-way communication requires trust and this takes a while to build. She must also establish her credibility as a resource. Next steps for Proctor involve assessing her previous strategies.

## Licensing by Design: A System(atic) Approach

Michael Rodriguez

Reported by Mandi Smith

Michael Rodriguez, the licensing and acquisitions librarian at the University of Connecticut, discussed how to incorporate licensing into a library's workflows and systems using the next generation integrated library system (ILS) Alma. After transitioning the license management information into Alma, the library began displaying license details to users.

The session began with the speaker informally polling the attendees about their systems and use of public-facing policies about e-resource terms. Ultimately, only about 20 percent of the attendees currently use public-facing policies to describe e-resource terms, and even fewer used Alma to do it. After the polls, the speaker offered us more background about his library's transition. Previously, they had used an open-source electronic resource management (ERM) system, CORAL, to manage their licensing. The library decided to manage licensing via Alma as there already had been heavy investment in the ILS and it allowed for better integration. All of the data was migrated manually so everything could be reviewed and cleaned up before being placed in Alma.

The speaker then offered a web tour of Alma/Primo Analytics. He reviewed the dashboard, inventory, history, license terms, various fields available, notes, and examples of licenses and amendments. His demonstration included how to search for a license, define and create terms, change the display of terms, and utilize notes to track the licensing workflow process. After showing how Alma can manage licensing workflows, the speaker presented the public display. Additionally, the audience learned the importance for users to view the licensing terms. In addition to potentially preventing researchers from accidentally using something incorrectly and being sued (which happened at the speaker's institution), it promotes transparency, serves as documentation that the library is fulfilling its obligation of trying to educate authorized

users, and has positive implications internally for improving library workflows including the elimination of the loaning spreadsheet.

The migration had several positive impacts at the University of Connecticut. It helped support licensing centralization which allowed for consistent terms and greater buying power. It also promoted licensing simplification by reducing exceptions to interlibrary loan after the library created an "all or nothing" approach. The migration also helped prioritize what values are important. As the speaker discussed, why negotiate for values that aren't worth displaying to users? Since electronic course reserves were discontinued at the speaker's institution, the number of questions about rights has increased, and the migration has helped with answering these questions. Additionally, the library has crafted a policy for use of licensed electronic resources. The focus of such a policy should include not only compliance to licenses, but also users' rights. In the future, they hope to craft more statements and incorporate more user outreach.

## MARC Metamorphosis: Transforming the Way You Look at E-Book Records

Jeannie Castro, Richard Guajardo, Matthew Ragucci, and Melissa Randall

Reported by Martha Hood

Whether a library individually creates records in their catalog, exports from OCLC, or obtains them directly from publishers or vendors, the quality of MARC records has always been one of importance to libraries. In this session, speakers from both the University of Houston and Clemson University shared the life cycle of an e-book—from acquisition to discovery. Speakers from both institutions also provided beneficial insight into decisions made regarding cataloging standards applied and workflows in the departments. As a publisher of many e-books, a speaker from Wiley illustrated their process of MARC record creation and delivery. The Wiley cataloging team confirms record data, adds any missing fields, and performs manual cataloging when needed. Most of their records are also RDA-compliant.

After learning about different catalog practices, Jeannie Castro shared her analysis of bibliographic e-book records from the two universities. Using the Program for Cooperative Cataloging (PCC)'s Provider-Neutral E-Resource MARC Record Guide, her focus for the study was on the 100/700, 245, 490, 505, and 650 MARC fields (both 505 and 650 are not included in PCC guidelines). Unable to focus on the "held in common" Wiley titles between the two schools, analysis was focused on records which were supplied by Wiley versus Serials Solutions MARC update records. With 51 titles in common, analysis showed that Serials Solutions records needed to be improved, especially in the 245 field. About 12 percent had incorrect information, almost 6 percent had typographical errors, and nearly 25 percent were not RDA-compliant. With Serials Solutions records, 98 percent did not have subject headings, and 94 percent did not have table of contents data. If a patron were to search by subject or keyword, the results showed that they would encounter significant roadblocks. After this analysis, Wiley clearly provided data-enriched bibliographic records for their customers. Interestingly, when comparing Clemson's cataloging practices against Wiley's records supplied from OCLC there was a perfect match.

Regardless of purchasing method, 143 Wiley titles were found to be held in common between the two universities. In the 100 and 700 fields, analysis showed they matched 93 percent of the time. The record of responsibility did not match 3 percent of the time in Serials Solutions records. Serials Solutions records provided very few subject headings (1.5 percent) and only 70 percent of the records had 505 fields. After analyzing the results, librarians should ask, how do patrons even discover an e-book? Previous University of Houston research revealed that almost half of their students searched by title in their web-scale discovery service. Again, those browsing by subject or keyword would be unsuccessful in finding specific e-books needed by the user.

In conclusion, this presentation honestly revealed how important the need is for libraries to receive high quality MARC records. Results showed the value of a

set of best practices when working with various vendors and publishers. It is essential that MARC records delivered to our libraries are those which contain accurate data in primary fields along with data which enriches our students' success. Better communication of our expectations with vendors and publishers is a good start toward this goal.

### **Navigating 21st-Century Digital Scholarship: Open Education Resources (OERs), Creative Commons, Copyright, and Library Vendor Licenses**

Rachel A. Miles and Heather Seibert

Reported by Kendra Macomber

Heather Seibert, the scholarly communications technician at East Carolina University, started the presentation by explaining Open Educational Resources (OERs) and their use of Creative Commons Licenses. Creative Commons Licenses, founded in 2001, are applied to works already under copyright and make it easy to share them. These licenses are ideal for shareable content because they are both easy to understand and are machine readable. Additionally, these licenses meet copyright standards both in the United States and internationally, making them an ideal solution for widely shared resources, like OERs. The flexibility and ease of these licenses are reflected in their use, which has risen exponentially since their inception, with 1.1 billion openly licensed works.

The Creative Commons Licenses include: Attribution (CC BY), Attribution-ShareAlike (CC BY-SA), Attribution-NoDerivs (CC BY-ND), Attribution-NonCommercial (CC BY-NC), Attribution-NonCommercial-ShareAlike (CC BY-NC-SA), and Attribution-NonCommercial-NoDerivs (CC BY-NC-ND). For a description about these licenses see <https://creativecommons.org/licenses/>. These licenses have corresponding icons that can be placed on resources, so users can know what is permissible at a glance. For example, Siebert explained that the game Cards Against Humanity is under a Creative Commons License CC BY-NC-SA and allows users to make their own cards as long as users provide attribution and do not earn any profits from them.

With her part of the presentation, Siebert provided a professional development opportunity that demystified Creative Commons Licenses and showed how they make it easier to share materials and resources.

Rachel Miles, the digital scholarship librarian from Kansas State University, discussed how her library addresses copyright inquiries. She introduced the resource “A Framework for Analyzing any US Copyright Problem” ([http://www.k-state.edu/copyright/docs/framework\\_for\\_analyzing\\_any\\_copyright\\_problem\\_with\\_links\\_added.pdf](http://www.k-state.edu/copyright/docs/framework_for_analyzing_any_copyright_problem_with_links_added.pdf)), which she uses when investigating copyright questions. This framework provides a step-by-step method to finding answers to copyright questions. Miles discussed how acting as the copyright resource on campus required a great deal of self-education that included personal research, online courses, and conferences. One important thing Miles learned through this research was that the individual making the copyright inquiry must make the final decision, and legally she could not tell them what to do.

While answering copyright questions from patrons, Miles realized that much of her work overlapped with the electronic resource librarian, Christina Geuther. Miles and Geuther decided they needed to make more information available to their campus community, so they collaborated to create a LibGuide (<http://guides.lib.k-state.edu/UsingContent>).

Providing public awareness was especially important to Geuther, who works with the licensing of e-resources at the University. E-resource licenses can override many provisions of copyright, affecting interlibrary loan, systematic downloading or mining, and concurrent usage. To ensure that users know about these restrictions, Geuther utilized the license module in Alma so it shows in the discovery layer of Primo. The librarians are empowering their community to make smart decisions due to the collaborative work regarding copyright and e-resource permissions at Kansas State University.

## **The New Dimensions in Scholcomm: How a Global Scholarly Community Collaboration Created the World’s Largest Linked Research Knowledge System**

Heidi Becker, Ralph O’Flinn, and Dr. Robert Scott

Reported by Scott McFadden

Digital Science is a portfolio of companies that support small innovative software companies. Started in 2009, most of its founders come from academic backgrounds. Six Digital Science companies decided to cooperatively create a new resource called Dimensions. Dimensions is a database of publications, awarded grants, patents, and clinical trials, with more content expected in the future. Publications data consists of over 90 million records, with metadata and citations derived from multiple databases. Grants data comprises 3.7 million grants, from over 250 global funders, while patent and clinical trial data covers multiple countries in North America, Europe, Asia, Australia, and New Zealand. Data from the various content sources are linked. For example, data on clinical trials are linked to publications that report on those trials, and to the grants which supported them.

Dimensions was created because citation metrics are often behind expensive paywalls, and other obstacles also stand in the way of the discovery of research data. It can be difficult for scholars to piece together the larger arc of the research cycle. Dimensions aims to integrate the data through the entirety of the research cycle, from pre-publication, through publication, to post-publication. Using enriched and interlinked metadata, Dimensions makes it easy to navigate between different areas of the research process.

Digital Science recognized that it could not create such a database alone, so worked with over 100 global partners over a period of two years. This partnership provided information about the actual needs in research discovery, administration, and management, and identified needs within different disciplines and regions.

One such development partner was the University of Georgia (UGA), a large comprehensive public research university, which needed research analytics tools to carry out peer comparison and collaboration discovery. UGA found Dimensions to be a natural fit for its needs. All UGA stakeholders, such as researchers, administrators, information scientists, etc., were involved in the development process. As a use case, UGA attempted to identify areas in which its research enterprise is competitive compared to peer institutions. Use of Dimensions' analytical tools allowed UGA to easily identify recent research areas of strength, to compare itself with aspirational peer institutions, and to identify UGA "stars" in competitive areas. This allowed UGA to identify potential research partners at other institutions, nominate star researchers for major awards, identify faculty recruits, and other important functions.

The University of Alabama at Birmingham (UAB), a comprehensive urban university, was another development partner. UAB wanted to create a new, cohesive system to update its old-fashioned faculty profiles. This resulted in the creation of Scholars@UAB, an interface which organizes and coordinates online faculty profiles. Integrating Dimensions functionality into the system allows faculty to link their publications to the supporting grant, associated clinical trials, and category of publication. In this way, faculty are able to learn more about their own areas of research, find other scholars working in that field, identify new potential sources of funding, and compare successful grant proposals. Scholars@UAB is live, and further Dimensions integrations are currently being worked on.

### **Open Access: How Accessible is It?**

Lisa A. Macklin

Reported by Kelly Denzer

Lisa A. Macklin is the Director, Research, Engagement, and Scholarly Communications at Emory University Libraries. Macklin opened her talk with a brief definition of open access and scholarly communication. She stressed that librarians have always supported

researchers, and open access presents a catalyst for librarians to add further support through the promotion of openly shared knowledge creation.

Macklin briefly reviewed open access projects such as The Budapest Open Access Initiative, the more recent SPARC PLoS 2014 brochure on the fundamentals of open access, and the OA 2020 Initiative working on new models of open access publishing. She also discussed a current project, TOME (Toward an Open Monograph Ecosystem), that focuses on the monograph in humanities and social sciences.

With these projects in mind, Macklin reminded the audience that scholarly communication and open access come under the purview of all information specialists and by expanding our understanding and definition of open access we will help to advance current and future initiatives. She suggested many ways to achieve this, including creating a set of guidelines to assess open access initiatives at our institutions, creating open access collection development policies, library-supported publishing, and by digitizing our library collections and making them openly available. She asked the audience to consider the accessibility of open access materials.

Macklin concluded her presentation with a challenge to the audience to reach out to new voices in the conversation around open access. For those who are early in their career, she encouraged seeking mentorship opportunities. Regardless of where you are at in your career, she reminded the audience to consider preserving presentation work or writings in an open repository.

### **Serials Clerk to Dean—20 Years with a Head in the Clouds**

Jeff Steely

Reported by Charlene N. Simser

1998 NASIG student grant winner Jeff Steely presented on his journey from serials clerk to dean of libraries and offered up some sound advice to session attendees.

## The Transfer Code of Practice: Overview and Updates

Jessie Copeland

Reported by Mandi Smith

Steely hadn't started life knowing he wanted to be a librarian, but perhaps his school media specialist (Mrs. B.) influenced him, and he recalled great experiences at both the public library in his hometown as well as his high school library.

Steely considered careers in architecture and chemistry, but ended up with a degree in history and religion. He supported his wife's career moves and often was the stay-at-home dad, but when his wife accepted a job at Baylor University, Steely took a part-time temporary job and soon realized "This is what I should be doing."

As a serials check-in clerk, Steely had a flexible boss who let him work on other projects, including an integrated library system migration. While working, he completed library school at the University of Texas at Austin. His first professional position was serials librarian at the U.S. Courts in Chicago. He returned to Baylor, holding numerous positions including outreach services librarian, assistant director for client services, assistant dean, director of central libraries, and associate dean, before applying for a job in 2015 at Georgia State University where he is currently dean of libraries.

Steely provided insights on his management and leadership style and suggested numerous books that he found inspiring, including *Reframing Organizations* by Lee G. Bolman and Terrence E. Deal and *The Fifth Discipline* by Peter M. Senge. He insisted there is a place for introverts in our profession, even in leadership positions, and recommended that librarians should have a growth mindset, which assumes that failure is a growth opportunity. Recognize that you will inevitably make mistakes. His advice for job seekers is to do your research on the institution, scour their website, learn what you can about members of the search committee, and practice your answers to typical questions.

Jessie Copeland, Head of Electronic and Continuing Resources at Emory University and member of the Transfer Code of Practice Standing Committee, offered attendees a brief overview of the Transfer Code of Practice and an update for the Enhanced Transfer Alerting Service. Copeland began the presentation by detailing just what the Transfer Code of Practice is. NISO's Transfer Code of Practice is a voluntary code for journal publishers containing best practices for transferring and receiving journals. In addition to offering a formalized role for transferring and receiving journals, those best practices also include timelines for transfer actions and communications, suggestions on how to handle identifiers and URLs, and the use of transfer alerting services. The Transfer Code of Practice helps to ensure that the transfer process occurs with minimal interruption. This is important because journals frequently change publishers and a lack of communication during transfers often leads to disruptions in the supply chain and, ultimately, the loss of library subscriptions. The history of the Transfer Code of Practice also was discussed, along with the information about the Transfer Code of Practice Standing Committee. The Transfer Code of Practice is governed by a group of librarians, publishers, and other experts. Currently, there are more than 60 endorsing publishers.

The speaker then discussed the Enhanced Transfer Alerting Service (ETAS). The ETAS consists of the Journal Transfer Notification Database, Transfer Notification List, and the Journal Transfer Notification form. ETAS no longer incorporates the use of a blog, but does still offer a RSS feed. Details available through the service include information about both the receiving and transferring publishers, important dates, and perpetual access information. Searching through the database is available via ISSN, transfer date, and multi-field, which can include titles, publishers, and more. The speaker



demonstrated a live example of how to use the database. In addition to manually searching the database, libraries also can sign up for notifications with the aforementioned RSS feeds or via email.

The presentation was concluded with information about future plans for the Transfer Code of Practice. The committee is currently working on the revision for version 4 which will hopefully better accommodate changes in technology and terminology. They hope to have something definitive to send out for public comment to the library and publisher community sometime this calendar year. Additionally, the ETAS will move to the ISSN Center's servers. The migration will incorporate URL redirects and the same information should be displayed. Information about the migration will be sent out to participants of the ETAS listserv. In the future, the governing group potentially wants to discuss creating a code for platform changes/transfers in addition to the current protocol for journal transfers.

### **Transforming the Quality of Metadata in Institutional Repositories**

Margaret Mering

Reported by Sofia Sluts kaya

Margaret Mering's presentation covered University of Nebraska Lincoln (UNL) institutional repository metadata practices related to personal names and ORCID iDs and establishing sustainable metadata quality standards for personal names. Mering started her presentation with the overview of UNL institutional repository.

Established in 2005, the repository currently contains 98,000 unique items such as publications from colleges, departments, and academic centers, electronic thesis and dissertations, conference proceedings, book chapters, articles and other materials. The repository also hosts a few academic journals and their backfiles, as well as Zea Books imprint publications. The presenter used Google analytics data to show how the repository items are accessed: 57 % come from Google, 17 % from

Repository itself, 5% from Google Scholar and only 0.01% from the library's discovery layer.

The presenter also discussed the institutional repository organizational structure and staffing. The department that reports to the system librarian has three faculty positions, one managerial professional staff, part-time staff that assists with metadata creation, and 40 hours per week of student help. Student assistants are tasked with scanning and uploading documents as well as metadata creation.

Mering shared a list metadata fields included in each record and described UNL digital repository metadata recording practices as they relate to names and disambiguating them. The presenter examined most common metadata issues and provided multiple examples of problems with punctuation, capitalization, foreign and compound names, and others. She also addressed the difficulty of establishing an author's identity due to the inconsistency of how information is submitted and the lack of one unique identifier. She highlighted difficulty with using such identifiers as an e-mail address, as the same author can provide different e-mail addresses for different publications, or the e-mail address can change if the affiliation changes.

Mering spent a significant portion of her presentation discussing ORCID iDs and the advantages and disadvantages of their use as a unique identifier in a digital repository. She also shared some data that shows how many UNL faculty members have ORCID iDs vs. VIAF (the Virtual International Authority File) authority records. The results vary greatly by discipline, so neither ORCID iD, nor authority record can be used to disambiguate the names in all cases.

Mering concluded the presentation by discussing the future of the UNL digital repository and the sustainable practices of creating and updating metadata. According to her, it is important to establish priorities, not to allow scope creep, to be proactive with maintenance, and to employ batch updating whenever possible.

## Wrangle and Corral that License Agreement

Alexis Linoski and Carolyn Carpan

Reported by C. Derrick Hiatt

In this session, each presenter discussed the tools they use to help manage e-resource licenses and the licensing workflow. Alexis Linoski, from Georgia Tech, discussed Trello and Carolyn Carpan, from the University of Alberta, discussed her library's use of CORAL.

At Georgia Tech, a recent sudden increase in the licensing workload drove Linoski to look for a management tool. She settled on Trello (<https://trello.com/>) as the one best suited to her needs, but also pointed out that many different product management tools are available.

Trello displays projects on "boards," which contain "lists," which are made up of "cards." Each "card" represents a task. A board can be for an individual user or shared by a team for collaborative projects. Some features of Trello that Linoski highlighted:

- visual interface
- view can be filtered
- "power-ups" (apps to boost functionality)
- e-mail can be sent to a board to create a new card/task.

Linoski also offered some Trello tips:

- Users can create a card that includes frequently-used links or other features, then use that as a template for other cards.
- Users can forward an e-mail to a card's Comments section. Linoski uses this feature by adding a card's e-mail address in the "cc" field on vendor e-mails, so correspondence about a license is collocated on that license's Trello card.
- Before creating a board, spend some time thinking about the process and the specific needs.

- Use Trello for something simple to become accustomed to using the product, before using it for a complicated process like license management.

Carpan described the combining of two units at the University of Alberta Libraries to form the Collection Strategies Unit. The new unit inherited two licensing databases from its predecessors—CORAL (<http://coral-erm.org/>) and the OCUL Usage Rights (OUR) database. Each database had different content, so the unit began a project in 2017 to consolidate the two into CORAL's licensing module.

As of the time of the presentation, the consolidation project was still in progress. Carpan showed how an item display in the library's discovery system presents ILL permissions (currently feeding from CORAL's Terms Tool), while other usage rights display as an additional link (feeding from the OUR database). The goal of the project is to add rights information into CORAL for classroom copies, course management systems, and course packs.

### Profile of Angela Dresselhaus, NASIG President

Christian Burris, Profiles Editor



*Photo Courtesy of Angela Dresselhaus*

#### **Who or what drew you to NASIG initially?**

I was a scholarship winner and enjoyed my experience at the 2007 conference in Louisville, Kentucky. Two of my supervisors from my paraprofessional career were involved in NASIG and spoke highly of the organization. Joining NASIG and becoming an active member was an obvious next step.

#### **When did you decide to become a librarian?**

My childhood dream of becoming a paleontologist wasn't going to pan out and a library employee told me that library jobs were low-stress. I secured my first position as a technical services student assistant in the

Music Library at the University of Louisville in August 2001. The work was enjoyable and helped me succeed in research during my undergraduate degree. It wasn't long before I was sure library school was in my future.

#### **What has been your greatest reward as a librarian?**

Mentoring and developing new talent in the electronic resources field is my greatest reward as a librarian. I enjoy the management aspects of my current position and I aspire to develop my leadership skills.

#### **How did you begin working with electronic resources?**

I graduated in summer 2009, during a long period when full-time academic librarian positions were very difficult to secure. My cataloging background appealed to hiring managers, and I was able to land my first job in electronic resources. That's where I landed, and I have a habit of embracing my current situation and making the most out of it. Turns out, electronic resources librarianship was a good fit, and I made a career out of it.

#### **What drew you to academic libraries?**

As I moved into professional librarianship, my work history was grounded in academic libraries and the familiar environment was a comfortable place to build a career.

#### **How did you arrive at East Carolina University?**

Working at East Carolina University was one of my long-term career goals, and the right position at the right time opened.

#### **Have you had any memorable moments serving as a copyright officer?**

The title "copyright officer" has never sat well with me. The primary aim of the role at ECU is providing education and consulting services; it's not a strong role in enforcement. After eight months as copyright officer, a fellow faculty member told me that I don't give off "officer" vibes and perhaps the name of the role should be changed. She was correct, as I most often act

as a mediator, advisor, and teacher when called to serve in my copyright capacity. Realizing that the community I serve needs a copyright consultant instead of an enforcer is my most memorable moment.

### **Who are you currently reading?**

This will be a revealing answer: *The Joy of Doing Just Enough: The Secret Art of Being Lazy and Getting Away with It* by Jennifer McCartney. There is an enormous pressure to be the best at everything, and this book really helps me to become comfortable with the areas of my life where I have very little natural talent. One example is preparing meals—I am abysmal in the kitchen, and I do suffer from pangs of guilt. However, this book defines the minimum level of functioning and encourages readers to embrace it as “just enough.”

### **How has NASIG changed/evolved during the time that you’ve been involved?**

Many people have embraced that we are not just serials! I started attending conferences in 2007, and there really is no comparing the programming in 2007 to the 2018 conference. The next steps will be spreading the news that we aren’t just serials and we have something to offer to a wide range of people.

### **What are your priorities/goals as the president of NASIG for the coming year?**

Increasing opportunities for remote engagement with NASIG is a top priority. NASIG on Demand is a great step toward reaching out to a larger audience. This year, I would like improve the marketing of NASIG on Demand.

I’d also like to create virtual positions on every NASIG committee. There are many reasons that prevent people from traveling, ranging from financial and family obligations to physical challenges. Offering virtual positions would be a step in increasing NASIG efforts toward inclusion.

## **Profile of the Web-Based Infrastructure Implementation Task Force**

Christian Burris, Profiles Editor



*Photo Courtesy of Paoshan Yue*

Paoshan Yue is the head of electronic resources and acquisition services at the Mathewson-IGT Knowledge Center for the University of Nevada, Reno. A longtime member of NASIG, she recently served as the chair of the Web-Based Infrastructure Implementation Task Force (WBIITF), charged with examining the online needs for the entire organization. I conducted my interview with Paoshan Yue by email on Sunday, May 13, 2018.

### **Could you describe the charge of the Web-Based Infrastructure Implementation Task Force?**

Sure. Briefly speaking, the task force is charged to work from a previously identified list of requirements for NASIG web-based infrastructure and to investigate, recommend, and implement a solution that will address those requirements.

The formal charge of the Web-Based Infrastructure Implementation Task Force is below:

“Starting in January 2018 and working from the Web-Based Infrastructure Implementation Task Force

(WBIITF) list of requirements, this task force is charged with investigating and implementing recommended solutions that address those requirements. An initial report of recommended solutions and potential implementation timeline, along with a draft budget, should be prepared for Board review by 13 April 2018. The Board will provide detailed feedback to the task force and expect a final report with implementation recommendations by 31 May 2018, in time for the Board to discuss and approve at its June meeting. The next phase of the task force's work will be to work closely with the Communications Committee, Membership Services Committee, and all other relevant committees/groups within NASIG to implement these solutions according to the approved budget and timeline." ([Web-Based Infrastructure Implementation Task Force webpage](#))

**Which areas did the task force examine specifically?**

We specifically examined five areas which were previously identified in the WBIITF list of requirements. The five areas are:

- Web management: 12 needed functionalities + 3 desired functionalities
- Membership databases: 4 needed functionalities + 1 desired functionality
- Event management: 2 needed functionalities
- E-commerce: 1 needed functionality + 2 desired functionalities
- Reporting: 4 needed functionalities + 1 desired functionality

**Has the initial report been submitted to the Board?**

Yes, the initial report was submitted to the Board on May 1, 2018.

**Will members will be able to provide their feedback at the annual conference in June?**

I don't know the answer to this question. As the charge indicates, the Board will discuss a final report from the

task force and make a decision at its June meeting. This might be a question for the NASIG Board.

**Both the Communications Committee and the Membership Services Committee will have their work affected by the task force's report. Do you anticipate any other committees that will be affected?**

I think any committee that currently uses AMO for their work will be affected somehow. Affected activities may include: sending a blast message to the entire membership or a subset of the membership, administering an online survey, event management (such as webinars), and invoicing.

The Communications Committee and the Membership Services Committee will be the most affected committees. The task force may work with those two committees first and then develop training materials on affected activities for additional committees as needed.

**What was it like to serve as the chair of the task force?**

Developing a "game plan" with a timeline early on and trying the best to stay on track was what I did. Composing emails for clear and timely communications with task force members and product vendors was also a big part of my experience.

Since the 8 task force members and the board liaison are located in different time zones across the country, it was a bit interesting to coordinate all the product demos for the group. I really appreciated the engagement and support this group has provided.

**Do you have any additional comments?**

The task force has seen very nice functionalities in our recommended solution, such as custom URL capability, intuitive admin interface, good reporting capability, and useful online help. I think these and other functionalities are something we have been looking for that can potentially make it easier for NASIG committees to do their work and for NASIG members and the public to use the NASIG website.

### Checking In

Kurt Blythe, Column Editor

[Note: Please report promotions, awards, new degrees, new positions, and other significant professional milestones. You may submit items about yourself or other members to Kurt Blythe at [kcbythe@email.unc.edu](mailto:kcbythe@email.unc.edu). Contributions on behalf of fellow members will be cleared with the person mentioned in the news item before they are printed. Please include your e-mail address or phone number.]

Now then, let's check in with our newest members to learn the stories of how they joined our wondrous organization...

"I've worked in resource sharing and access services for over 10 years, and came to work with serials thanks to a merger between our ILL and Acquisitions departments. About a year ago I found myself thrust into the world of serials, and rapidly realized how complicated that world can be. I joined NASIG because the group and the conference came highly recommended from some trusted colleagues, and because I recognize the importance of building a strong professional network as I learn the ropes. I attended NASIG for the first time this year, and found it to be a very practical, useful conference, and one I'll definitely attend again in the future."

#### **Nora Dethloff**

Head of Research Materials Procurement  
M.D. Anderson Library  
University of Houston

"I have had a varied career working in three libraries in my hometown of Kansas City, Missouri. At all three, I was part of teams that supervised the physical relocation or catalog incorporations of large collections. I have also been involved with three ILS migrations and am preparing for a fourth. I started 26 years ago at Linda Hall Library. I worked up to Library Assistant in serials receiving and was on the Re-con Project of the Kardex to the library's first automated system. I also

worked in serials receiving at the University of Missouri, Kansas City, Health Sciences Library, where one thing I learned was about the convolutions of medical journal supplements. For the last 13 years, I have worked as Library Assistant in monograph cataloging in the Spencer Art Reference Library at the Nelson-Atkins Museum of Art. One of my biggest projects was to catalog gifts of around 3000 photography books. Our Serials Assistant retired at the beginning of the year and I have taken on her tasks, checking in subscriptions and gifts, cataloging new titles and changes, and serials collection maintenance. I look forward to being a member of NASIG and engaging with the people, resources and development programs."

#### **Scott Easterday**

Library Assistant  
Spencer Art Reference Library  
Nelson-Atkins Museum of Art  
Kansas City, Missouri

"I began working as a Library Specialist at Winthrop University (located in Rock Hill, SC) on June 1st. I am responsible for managing the print and electronic serials; tasks include ensuring online access to the e-journals and keeping our inventory up to date.

Prior to that, I began working with serials while interning at UNC-Charlotte, where I had similar responsibilities as described above. I then attended the NC Serials Conference back in April and joined NASIG that day!"

#### **Christopher Girgenti**

“I was the Senior Manager of Product Data Quality and Solutions at Wiley until May, and my team primarily worked with continuing resources, i.e., serials. I resigned from my position and left in May to dedicate time to a job search more aligned with my professional goals. I'm interested in electronic resources (I have a particular affinity for serials) and OER.”

**Rena D. Grossman**

“My name is Dana Tomlin. I am the new Electronic Resource Librarian at SUNY Old Westbury in New York. I began working here on April 23rd. I am new to NASIG; I became a member in May as I am new to the field of academic librarianship and saw this organization as an avenue of support and additional resources and plan on devoting time to the organization in any way that I can.”

**Dana Tomlin**

“I am the Electronic Discovery Librarian at California State University, Fullerton, Pollak Library. I have been in this position since 2015. I have worked at the library since 1989. (I actually worked as a student assistant from 1987-1989.) I started my staff work in 1989 as a Clerical Assistant/Library Assistant working my way up the ranks and in 1995 I obtained my MLIS from San Jose State. From 1995-2004 I worked as the CSUF Branch Campus Librarian (at that time it was the Mission Viejo Campus located on the grounds of Saddleback Community College). I returned to the main campus in 2004 due to illness and became a Librarian Assistant in the Serials department from 2004-2014. During this time I became familiar with the all things serials - from copy cataloging, title changes, OCLC, and the SFX administration module. I was reinstated as a librarian in 2015, becoming the Electronic Discovery Librarian. I became indoctrinated into the world of unified library management systems when Fullerton moved from Millennium and SFX to Alma (we went live in the summer of 2017).”

**Greg Yorba**

**Citations**

Kurt Blythe, Column Editor

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

And now, for our contributions to the scholarship:

On May 4, I presented on “Managing Serials in Alma: Prediction Patterns, Claiming, and More” at the 2018 ELUNA Annual Meeting in Spokane, Washington. A copy of the presentation can be found at <http://documents.el-una.org/1722/>.

**Rebecca Bearden**

Technical Services Librarian  
UCONN School of Law Library

On June 6, I presented a poster entitled "Learning the Ins and Outs of the Library Through Internship Experience" at the Metrolina Library Association annual conference.

**Christopher Girgenti**

A colleague and I just had an article published in a peer-reviewed publication that might be of interest to NASIG readers:

Jill J. Crane and Marcella Leshner, “Beyond the Campus: National and International News Coverage in College Newspapers, 1920-1940,” *Journalism History* 44, no.2 (Summer 2018): 101-108.

**Marcella Leshner**

Professor/Periodicals Librarian  
Blume Library  
St. Mary’s University

I have a new publication out:

<http://doi.org/10.7710/2162-3309.2212>

### **Rachel Miles**

Digital Scholarship Librarian

Assistant Professor

Center for the Advancement of Digital Scholarship

Kansas State University

### **Title Changes**

Kurt Blythe, Column Editor

[Note: Please report promotions, awards, new degrees, new positions, and other significant professional milestones. You may submit items about yourself or other members to Kurt Blythe at [kblythe@email.unc.edu](mailto:kblythe@email.unc.edu). Contributions on behalf of fellow members will be cleared with the person mentioned in the news item before they are printed. Please include your e-mail address or phone number.]

We have a title change! Please join me in congratulating Matthew Ragucci on his promotion from Library Technical Services Manager to Library Solutions Architect at Wiley.

### **Standards Corner: COUNTER 5 Update**

Melissa Belvadi, Standards Committee

Since the last report of the Standards Committee, the COUNTER organization has continued its consultations with librarians and publishers and made a few changes to the original COUNTER Release 5 Code of Practice draft.

The most notable changes regard the handling of "gold" and "delayed" Open Access. The technical report of the changes from Draft 1 to Draft 2 is available on the COUNTER organization website (<https://www.projectcounter.org/release-5-summary-changes-draft-1-draft-2-counter/>), but most librarians may find reading "The Friendly Guide to Release 5 for Librarians" to be the most useful to understanding the overall R5 as it stands now

([https://www.projectcounter.org/wp-content/uploads/2018/03/Release5\\_Librarians\\_PDFX\\_2\\_0180307.pdf](https://www.projectcounter.org/wp-content/uploads/2018/03/Release5_Librarians_PDFX_2_0180307.pdf)).

One of the ways COUNTER has addressed some librarian concerns, particularly about R4 reports such as the "year of publication (YOP)" breakdown provided in JR5, is to implement "standard views" which are canned filters to the much larger "master reports." For instance, the JR5 has now become the standard view labeled TR\_J4. The reports and standard views are explained on the Release 5 webpage

(<https://www.projectcounter.org/code-of-practice-five-sections/4-1-usage-reports/>). The standard specifies that "to achieve compliance, a content provider MUST offer the Master Reports and Standard Views that are applicable to their host types."

The COUNTER organization continues to solicit feedback on a few remaining fine points, so there may be more changes in the next few months.

While COUNTER 5 officially goes into effect for compliant providers in January 2019, some providers may choose to provide COUNTER 5 reports side by side with COUNTER 4 reports in the last few months of 2018.



### Digital Preservation Task Force Survey

Shannon Keller, DPTF Chair

The Digital Preservation Task Force will be conducting a survey, starting late September, through October, about information professionals' awareness of, and

involvement in digital preservation initiatives. Please keep an eye out for the email announcing the survey and share it with your colleagues. The task force appreciates your help in spreading awareness about this survey. If you have any questions, please email: [digpres@nasig.org](mailto:digpres@nasig.org)

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## Executive Board Minutes

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### NASIG Board Conference Call

April 9, 2018

#### Attendees

#### Executive Board:

Anna Creech, *Past-President*

Angela Dresselhaus, *Vice President/President-Elect*

Kelli Getz, *Secretary*

Michael Hanson, *Treasurer*

Jessica Ireland, *Treasurer-Elect*

#### Members at Large:

Betsy Appleton

Chris Bulock

Karen Davidson

Maria Hatfield

Adolfo Tarango

Ted Westervelt

Eugenia Beh, *Ex Officio*

Kate Moore, *Ex Officio*

#### Guests:

Lori Duggan, *Incoming Editor-in-Chief, NASIG Newsletter*

Lisa Martincik, *Incoming MAL*

Kristen Wilson, *Incoming Vice President/President-Elect*

#### Regrets:

Steve Oberg, *President*

Beth Ashmore, *Incoming Secretary*

Marsha Seamans, *Incoming MAL*

Steve Shadle, *Incoming MAL*

#### 1. Welcome (Dresselhaus)

The meeting was called to order at 11:02 am central.

#### 2. Sponsorship Update (Creech)

There are four tier 1 sponsors, eight tier 2 sponsors, and two tier three sponsors for a total of \$30,000 in sponsorships so far.

#### 3. Marketing & Social Media Coordinator Update (Beh)

Registration is up for preconferences, and there are enough participants for all preconferences to go forward.

Beh will continue pushing the Great Ideas and Snapshot Sessions as well as overall registration and the Student Spotlight Sessions.

#### 4. Treasurer's Report (Hanson)

- The investments are doing well and have stabilized.
- Hanson is working on preparing tax information to send to NASIG's accountant.
- Hanson is looking into changing NASIG's fiscal year from January 1 - December 31 to July 1 - June 30 to coincide with the conference cycle. It will also

increase efficiency in accepting conference sponsorships.

- **Action Item:** Hanson will work to get the incoming board members' names on the NASIG bank account so that they can begin using their credit cards.

**VOTE:** Hanson moved to change NASIG's fiscal year from January 1 - December 31 to July 1 - June 30 starting in 2019. Westervelt seconded. The motion passed unanimously.

## 5. Secretary's Report (Getz)

Annual reports are due May 1st for all committees and task forces except for CPC, E&A, PPC, and Mentoring.

There was a reminder for all board members to review their current action items.

## 6. Bylaws Changes and Voting Requirements (Dresselhaus/Oberg)

The most recent bylaws vote did not reach the quorum. The Board discussed a number of ways to address the quorum issue. It was decided that this will be a discussion at the Members Forum during the conference. Hatfield will take this back to Bylaws to draft up language to address the quorum issue.

**Action Item:** Hatfield will take the quorum issue back to Bylaws to draft up language to address it.

## 7. Committee Updates (All)

- Conference Proceedings Editors (CPE): The new proceedings cycle has begun. Few presenters requested recorders this year. The search for replacement editors continues.
- Evaluation & Assessment (E&A): E&A is working on updating the survey questions from last year.
- Membership Services (MSC): MSC is working on making the organizational membership online

renewal process the same as the individual membership online renewal process.

- Mentoring: The invitation for the First Timers' Reception and the call for mentors/mentees has gone out.
- Newsletter: The March issue of the NASIG Newsletter has been published. The May issue is underway.
- Program Planning (PPC): One program presenter cancelled, so PPC talked with the second presenter to fill the hour. Great Ideas and Snapshot Sessions are on track. Vendor Lightning Talk programming is underway.
- Web-Based Infrastructure Implementation Task Force (WBIITF): They are looking at options that are more user-friendly than the current AMO system.
- Student Outreach Committee (SOC): SOC and Mentoring have been exploring the possibility of a merger. SOC and Mentoring will meet during the conference to begin discussions as to how they would like to move forward with the merger over the next couple of years.

## 8. Adjourn (Dresselhaus)

The meeting was adjourned at 11:57 am central.

Minutes submitted by:

Kelli Getz

Secretary, Executive Board

## NASIG Board Conference Call May 9, 2018

### Executive Board:

Steve Oberg, President

Anna Creech, Past-President

Angela Dresselhaus, Vice President/President-Elect

Kelli Getz, Secretary

Jessica Ireland, Treasurer-Elect

**Members at Large:**

Betsy Appleton  
Chris Bullock  
Karen Davidson  
Maria Hatfield  
Adolfo Tarango  
Ted Westervelt

**Ex-Officio:**

Eugenia Beh  
Kate Moore

**Guests:**

Beth Ashmore, Incoming Secretary  
Lisa Martincik, Incoming MAL  
Marsha Seamans, Incoming MAL  
Steve Shadle, Incoming MAL  
Lori Duggan, Incoming Newsletter Editor, Ex Officio

**Regrets:**

Michael Hanson, Treasurer  
Kristen Wilson, Incoming Vice-President/President-Elect

**Welcome (Oberg)**

The meeting was called to order at 2:04 PM central.

**Sponsorship Update (Crech)**

Sponsorship is up this year. There are 17 sponsors this year, four more than last year.

**Marketing & Social Media Coordinator Update (Beh)**

Beh has been sending out a reminder each day on social media to remind people that Early Bird Registration ends on May 11. She will be blogging about things to do in Atlanta.

**Treasurer's Report (Hanson)**

Investment levels fell quite a bit but stabilized at \$276,000.

**Secretary's Report (Getz)**

Sunday night hotel registrations are down, which could be due to the timing of the conference.

Information will go out soon regarding the Board meeting at the conference including sending out the agenda and organizing the Board dinner on Thursday evening.

**VOTE:** Dresselhaus moved to approve the minutes from the 4/9 conference call. Bullock seconded. The motion passed unanimously.

**Update on UKSG Insights Discussion (Steve)****Feedback on WBIITF Preliminary Report (Chris)**

The Web-Based Infrastructure Implementation Task Force completed a draft of their report. The Board is impressed with the progress made by the task force. WBIITF was able to identify a set of potentially feasible products to replace AMO. AMO pricing is needed to compare AMO to the newly identified products.

**ACTION ITEM:** Hanson will provide the Board AMO pricing to help the Board and WBIITF in the process of identifying a replacement to AMO.

WBIITF recommended that NASIG hire a part-time person to help with website maintenance. While the Board agrees that this is a good idea, it is not a financially viable option at this time.

WBIITF cautions that the migration process could be difficult because there is a lot of content. It is advised to run a test system for at least a year to work out potentially issues.

**ACTION ITEM:** Board members will provide Bullock feedback on the WBIITF draft within two weeks of today's meeting.

## Members Forum Agenda (All)

Items for the Members Forum agenda include recognition of outgoing committee chairs and a discussion of bylaws changes. A parliamentarian is still needed to facilitate the discussion.

**ACTION ITEM:** Oberg will select a parliamentarian for the Members Forum.

## Committee Updates (All)

- Awards & Recognition: A&R would like to get someone from EBSCO to present the Horizon Award. They would also like to have the presenter practice names of the award winners before the presentation at the conference, make sure that the winners are seated close to the stage, coordinate a volunteer photographer, and create an award presenter script.
- Bylaws: Bylaws sent out the revisions for comment in preparation for the Members Forum.
- Communications: CC will reorganize the conference countdown clock to clean up the website.
- Continuing Education: CEC is preparing a conference q&a that will be distributed at the beginning of June.
- Conference Planning: The sales person at the hotel said that NASIG has not yet met the revenue minimum. Additional hotel rooms have been added beyond the contract. Also, CPC will soon make decisions on the items to be included in conference folders.
- Digital Preservation Task Force: DPTF agreed upon the cc-by-sa terms. DPTF will be presenting a panel at the LPC conference next week.
- Evaluation & Assessment: E&A is working on the post-conference survey.
- Mentoring: Mentoring is working on pairing up first timers with mentors.
- Newsletter: The May issue is coming out soon.
- Program Planning: PPC is doing a marketing push. They are also looking for someone to oversee the lightning talks.

- Proceedings: A new editor and production assistant have been hired.
- Standards: The Board confirmed that Standards should continue pursuing a relationship with UKSG.
- Student Outreach: SOC is also busy matching mentors and mentees.

## Adjourn (Oberg)

The meeting was adjourned at 3:00 pm central.

Minutes submitted by:

Kelli Getz  
Secretary, Executive Board

## NASIG Board Meeting June 7, 2018 Grand Hyatt Atlanta, Atlanta, GA

### Executive Board:

Anna Creech, Past-President  
Angela Dresselhaus, Vice President/President Elect  
Kelli Getz, Secretary  
Michael Hanson, Treasurer  
Jessica Ireland, Treasurer-Elect  
Steve Oberg, President

### Members At Large:

Betsy Appleton  
Chris Bullock  
Karen Davidson  
Maria Hatfield  
Adolfo Tarango  
Ted Westervelt

### Ex-Officio:

Eugenia Beh  
Kate Moore

### Guests:

Beth Ashmore, Incoming Secretary  
Lisa Martincik, Incoming MAL  
Marsha Seamans, CPC Co-Chair & Incoming MAL  
Violeta Ilik, PPC Chair

Sarah Perlmutter, CPC Co-Chair  
Andrew Barker, UKSG Chair

### **Regrets:**

Kirsten Wilson, Vice-President/President Elect  
Steve Shadle, Incoming Member at Large  
Maria Collins, PPC Vice-Chair  
Anne McKee, Conference Coordinator  
Lori Duggan, Incoming Newsletter Editor-in-Chief

### **Welcome (Oberg)**

The meeting was called to order at 9:07 AM local time.

CPC/PPC Report (Collins, Ilik, Perlmutter, Seamans)

### **Program Planning:**

- PPC is unsure if the poster boards that they ordered will arrive in time for the Great Ideas Showcase.
- PPC members will be introducing sessions.
- Ilik recommends the EZ Chair system to better help PPC manage their workload.

### **Conference Planning:**

- There are 314 people registered for the conference, 6 registrants for NASIG On-Demand, 20-25 registrants for each full-day preconference, and 16 registrants for the half-day preconference. There will be two librarians from Qatar that will be attending.
- There are 818 hotel room nights booked in the NASIG conference block. Revenue was exceeded for all nights except Sunday night. NASIG will need to pay \$1,000 if the hotel is not fully booked on Sunday night.
- NASIG received 19 free rooms, and those were given to the audio/visual technicians per our contract, as well as NASIG award winners.
- Food and beverage selections were made carefully, and food at breaks was pared down. NASIG is still paying about \$280 per person for food and beverage, which is expected to break even.

- Extra money was spend on 1,000 folders, but there will be enough folders for next year.
- Seventeen vendors will participate in the Vendor Expo. There are several new sponsors. It would be good to get feedback from previous sponsors who chose not to exhibit this year. Sponsorships are at \$36,500 for the conference.

### **NASIG and UKSG Collaboration (Barker, Oberg)**

Barker presented ways that NASIG and UKSG could work together more closely.

### **Web-Based Infrastructure Implementation TF Final Report (All)**

Bullock praised the work of the Web-Based Infrastructure Implementation Task Force (WBIITF). WBIITF spent a lot of time watching presentations and trying out demo accounts with several potential systems.

### **Conference Costs/Pricing Discussion (All)**

Conference registration has remained at the same level for the third year in a row, although conference costs continue to rise. Food and beverage per person at the conference is \$280.

The board discussed the need to revisit conference registration for the 2019 conference.

### **Treasurer's Report (Hanson/Ireland)**

The Board Reimbursement Policy was never formally voted on earlier in the year. Hanson would like it to be implemented after this conference. For speakers, Hanson will adhere to the guidelines in the MOUs.

Hanson advises that the new fiscal year should be August 1- July 31. The July 1- June 30 might not be enough time to reconcile conference expenses.

## Marketing & Social Media Coordinator Report (Beh)

Beh could use additional help getting the word out about the conference on social media.

Beh recommends a coordinator-in-training or a committee to deal with the workload and for succession planning. One recommendation is to have a dedicated person on each committee who is responsible for liaising with the Marketing and Social Media Coordinator. The benefit of a committee is that there would be more people to review a message before it's distributed. The benefit of a single point-person is that one person could vet the materials and send out a consistent message.

### Committee Updates (All)

- Awards & Recognition: Nothing to report.
- Communications: Communications is trying to figure out a better way of managing the listservs. CC isn't notified when an email has bounced. Unfortunately, there doesn't seem to be an automated way to manage the process. Current nasig-l and committee listservs are approximately \$500/month. The same system has been used for many years. It is time to investigate different list managers.

**ACTION ITEM:** Communications will investigate group communication tools as possible replacements for current listserv management system.

- Continuing Education: CEC hosted a webinar the week before the conference to help first timers understand the conference. Unfortunately, CEC did not have any attendees.
- Digital Preservation Task Force: A panel from DPTF will be speaking at the NASIG conference as well as at UKSG next year. They would like to survey the NASIG membership to help them better understand where libraries are in regards to digital preservation. The goal is to create a NASIG guide after identifying any information they might have

missed. The task force will wrap up at the 2019 conference.

- Evaluation & Assessment: E&A created the conference survey.
- Membership Services: MSC will be working on cleaning up organizational membership records.
- Mentoring: Mentoring and the Student Outreach Committee (SOC) will be meeting during the conference to discuss the merger. Many members of Mentoring and SOC did not attend the conference. The board discussed making conference attendance required for members of the two committees because many of their responsibilities/duties happen during the conference.
- Newsletter: Duggan is ready to step in as the Editor-in-Chief.
- Nominations & Elections: New board members were elected.
- Proceedings: Individual articles from the 2017 conference are available, but the editors are still waiting on the entire issue to be published. Most people this year are writing their own papers. There are two new editors
- Standards: Nothing to Report.
- Student Outreach Committee: Student award winners will be invited to present at the Student Snapshot Sessions. This needs to be documented.

**ACTION ITEM:** Awards & Recognition need to include in their manual that student award winners will be invited to participate in the Student Snapshot Sessions. This also needs to be included in the official description on the website.

SOC would like there to more coordination for ambassadors to schools. They will be crafting messages and working on a communication plan.

**ACTION ITEM:** SOC, A&R and Marketing & Social Media Coordinator should share contacts with library school ambassadors. Additionally, the group needs to work on crafting a communication plan.

The call for mentors and mentees needs to go out earlier in the year.

### **Secretary's Report (Getz)**

- Action Items update
- Board Activity Report, June 5, 2018: The motion to approve the minutes from the 5/9 conference call made by Tarango and seconded by Hatfield passed with 10 votes in favor and 2 abstentions.

### **Parking Lot Issues (All)**

The NASIG On-Demand workflow was discussed. The registration form will remain open for NASIG On-Demand so that it can continue to be sold after the conference. An email blast with the recordings will be sent to conference attendees as part of their registration.

**ACTION ITEM:** Davidson and Jones will send out the recording for conference attendees when the recording is available.

There was a discussion about selling the conference attendee list. At present, only Tier 1 sponsors get a copy of the list. The board decided to keep the attendee list as part of the Tier 1 sponsorship level to encourage vendors/publishers to be Tier 1 sponsors. A suggestion was made to make the early-bird list available for purchase right after early-bird registration closes to give vendors/publishers more time to market their attendance at the conference and to set up meetings with attendees.

UKSG has more tiers, so the 2018-2019 Board will review the UKSG sponsor levels and the NASIG sponsor levels to decide if NASIG needs more sponsorship tiers.

**ACTION ITEM:** The Treasurer will work with MSC to get a list of organizational members who were part of the old sponsorship tiers in 2017 and part of the new sponsorship tiers in 2018. The sponsors will be polled to

get a sense of their satisfaction level with the new sponsorship tiers.

The 2018-2019 Board will be using Trello to conduct their work.

Committee reports were inconsistent in addressing the request to tie their work to the NASIG Strategic Plan.

**ACTION ITEM:** Committee liaisons will remind committees/task forces about the new form and the need to tie their work back to the strategic plan.

### **Adjourn (Oberg)**

The meeting was adjourned at 4:15 PM Eastern.

Minutes Submitted by:  
Kelli Getz  
Secretary, Executive Board

## Treasurer's Report

### September 2018 Report

Jessica Ireland, Treasurer

#### Current Balance Sheet

Balance Sheet 8/20/2018	2018	2017
<b>Chase Deposit Accounts</b>	\$61,172.89	\$107,493.27
Checking	\$4,758.37	\$35,610.55
Savings	\$56,414.52	\$71,882.00
<b>JP Morgan Investments</b>	\$280,615.60	\$269,331.93
Alternative Assets	\$147,713.49	\$139,128.42
Fixed Income	\$132,902.11	\$131,651.82
<b>Total Equity</b>	<b>\$341,788.49</b>	<b>\$376,825.20</b>

#### Committee Expenditures for 2018 to date

NASIG Committee	2017 Expenditures	2018 Budget Proposal	2018 Expenditures to Date (8/20/2018)
A&R	\$14,855.31	\$24,350.00	\$18,150.00
Administration	\$26,366.82	\$28,000.00	\$8,524.89
Archives	\$0.00	\$350.00	\$0.00
Bylaws	\$0.00	\$100.00	\$0.00
CEC	\$1,134.00	\$1,200.00	\$297.00
Communications	\$15,746.99	\$20,000.00	\$8191.44
CPC	\$4,815.54	\$3,000.00	\$4275.37
D&D	\$0.00	\$100.00	\$0.00
Evaluation	\$0.00	\$100.00	\$0.00
Mentoring	\$0.00	\$100.00	\$0.00
Membership Services	\$0.00	\$200.00	\$0.00
N&E	\$0.00	\$100.00	\$0.00
NASIG Sponsorships	\$3,930.00	\$4,000.00	\$1,500.00
Newsletter	\$0.00	\$100.00	\$0.00
Outsourcing	\$6,675.30	\$5,000.00	\$5686.20
Proceedings	\$879.95	\$100.00	\$878.52
PPC	\$944.64	\$2,000.00	\$592.01
Site Selection	\$0.00	\$2,000.00	\$0.00
Standards	\$0.00	\$100.00	\$0.00
Student Outreach	\$0.00	\$100.00	\$0.00
Treasurer	\$13,591.70	\$16,000.00	\$5862.19
Digital Preservation TF	\$0.00	\$100.00	\$0.00



Financial Planning TF	\$0.00	\$200.00	\$0.00
SC Core Comp TF	\$0.00	\$100.00	\$0.00
Strategic Planning TF	\$0.00	\$100.00	\$0.00
Web-Based Infrastructure Implementation TF	N/A	\$100.00	\$0.00
<b>Total</b>	<b>\$88,940.25</b>	<b>\$107,600.00</b>	<b>\$53,957.62</b>

### 2018 Atlanta Conference Financials

<b>Atlanta 2018 Conference Financials</b>	
Grand Hyatt Atlanta	
327 Attendees	
<b>Expenses</b>	
Hotel	\$16,960.70
Hotel Food	\$83,722.58
AV	\$44,645.00
Speaker Fees & Travel	\$4,932.76
<b>Total Conference Expenses</b>	<b>\$149,432.33</b>
Conference Registration income	\$106,593.00
Conference sponsor Income	\$37,655.00
Café Press	\$29.27
<b>Total Conference Income</b>	<b>\$144,277.27</b>
<b>Total Profit/Loss</b>	<b>(\$5,155.06)</b>

<b>Indianapolis 2017 Conference Financials</b>	
Westin Indianapolis	
289 Attendees	
<b>Expenses</b>	
Hotel	\$20,359.69
Hotel Food	\$85,350.42
Opening Social Venue	\$8,092.70
Opening Social Food	\$18,753.00
AV	\$43,333.70
Speaker Fees & Travel	\$4,483.96
<b>Total Conference Expenses</b>	<b>\$180,373.47</b>
Conference Registration income	\$88,106.00
Conference sponsor Income	\$28,710.00
Café Press	\$60.52
<b>Total Conference Income</b>	<b>\$116,816.00</b>
<b>Total Profit/Loss</b>	<b>(\$63,557.47)</b>

## Committee Reports & Updates

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### Conference Planning Committee Annual Report

Submitted by: Marsha Seamans and Sarah Perlmutter

#### Members

Sarah Perlmutter, co-chair (EBSCO)  
Marsha Seamans, co-chair (University of Kentucky)  
Stacy Baggett, member (Shenandoah University)  
Lisa Barricella, member (East Carolina University)  
Donna Bennett, member (Georgia College)  
Eleanor Cook, member (East Carolina University)  
Beverly Geckle, member (Middle Tennessee State University)  
Richard Guajardo, member (University of Houston)  
Trina Holloway, member (Georgia State University)  
Martha Hood, member (University of Houston at Clear Lake)  
Shannon Keller, member (New York Public Library)  
Anu Moorthy, member (Life University)  
Denise Novack (Carnegie Mellon University)  
Pat Roncevich, member (University of Pittsburgh Law)  
Joyce Tenney, ex-officio (retired)  
Mary Ann Jones, ex-officio (Mississippi State University)  
Karen Davidson, ex-officio (Mississippi State University)  
Anne McKee, ex-officio (Greater Western Library Alliance)  
Tom Osina, ex-officio (Non-Profit Help)  
Steve Oberg, board liaison (Wheaton College)

#### 33<sup>rd</sup> Annual Conference, Buckhead, Atlanta, Georgia

##### Summary of planning

Some members of the 2016/2017 & 2017/2018 Conference Planning Committees met at the Indianapolis conference with Board liaison, Steve Oberg to jumpstart the planning for the 2018 conference in Atlanta. With a downward trend in attendance at the conferences, it was apparent from the beginning that CPC would need to be vigilant in monitoring the conference budget and hotel registrations, and

participate in marketing. The CPC co-chairs spent July-August getting up to speed on responsibilities, including a very informative one-day meeting with Joyce Tenney. The Committee met via conference call on August 1, 2017 and then monthly through March, with bi-monthly meetings in April and May.

The conference theme, “Transforming the Information Community” was chosen to echo and reinforce NASIG branding; and the conference logo, designed by Jeff Hancock of Hancock Branding x Communications utilized NASIG blue and green colors, incorporating the theme and the Georgia Peach to bring the elements of the conference and the organization together.

Based on NASIG’s desire to ensure that attendees get as much value as possible from the conference and feedback from the membership about concern for rising conference costs that might limit participation, the Executive Board made the decision that regular conference registration rates be held at the same rate as the previous two years.

After intensive investigation, it was determined that an off-site opening reception would not fit into the conference budget and the opening events would take place at the conference hotel.

Tom Osina (Non-Profit Help) issued an RFP for audiovisual services on behalf of NASIG. After receiving and evaluating the proposals and some additional negotiations, the AV contract was awarded to Action Audio Visual, Inc. The contract included video recording of the vision sessions and six of the concurrent sessions. Registration for the full conference included access to the recordings, packaged as “NASIG on Demand: Features of the 2018 Conference.” Those unable to attend the conference in person can purchase “NASIG on Demand,” with the price set at \$149 for individuals (or \$49 for students) and \$249 for groups.

In consultation with the Board, 1000 conference folders with the NASIG logo were ordered to be used at this and future conferences, again with the idea of increasing NASIG branding. Folder contents were determined in consultation with the Board. Folder contents and signage were printed and shipped to the hotel. Badge holders, identifying ribbons and other miscellaneous supplies were also ordered. The registrars printed the name badges utilizing the list of attendees.

Conference arrangements included making and managing hotel reservations for the Executive Board, vision speakers, UKSG guests, AV technicians, and award winners; making room assignments for all sessions and events and preparing a final detailed conference schedule; and making final arrangements with the hotel for food and beverage selections. Conference co-chairs also made all the food and beverage, meeting room and guest room arrangements with the hotel for the fall Executive meeting held in October 2017 and the Annual Executive Board meeting that immediately preceded the conference.

It is very important to acknowledge the hard work and dedication demonstrated by all of the committee members. Every contribution made a difference to the success of the conference. In addition to the ongoing assignments, committee members volunteered at the registration desk during the conference. Special thanks to Donna Bennett, Shannon Keller, and Lisa Barricella for arriving a day early to assemble registration packets. CPC assignments were as follows:

Registrar – Karen;  
 Registrar-in-training – Mary Ann;  
 Hotel liaison, conference budget – Marsha;  
 Food selections – Marsha, Sarah;  
 Audiovisual contract – Tom, Marsha, Sarah;  
 Opening reception – Sarah;  
 Website/webmaster – Richard;  
 Vendor sponsorships and vendor exhibits – Sarah;  
 Local arrangements – Anu, Trina, Martha;

Volunteers – Donna;  
 Dine Arouds – Eleanor;  
 Souvenirs/Café Press – Stacy;  
 Fun run – Shannon;

Branded conference swag – Lisa;  
 Conference photography – Beverly

**Budget**

An impressive effort on the part of Sarah Perlmutter in her fundraising role, yielded a higher than usual sponsorship income; and, a variety of factors including location of the conference, marketing and an excellent roster of preconference, vision and session speakers, served to increase conference registrations from the previous year. The estimated conference income is \$139,149 and expenditures \$139,133 as detailed below:

<b>EXPENDITURES</b>	
Logo design	\$ 500.00
Opening speaker	\$ 200.00
Audiovisual services <i>estimated</i>	\$ 50,000.00
Food and Beverage	\$ 83,172.00
Vision speaker expenses <i>estimated</i>	\$ 3,000.00
Conference supplies and printing	\$ 2,261.21
<b>TOTAL EXPENDITURES</b>	<b>\$ 139,133.21</b>
<b>INCOME (ESTIMATED)</b>	
Conference registrations	\$ 103,649.00
Sponsorships	\$ 35,500.00
<b>TOTAL INCOME</b>	<b>\$ 139,149.00</b>

**Challenges**

The Friday to Monday conference schedule that was a variation on what has typically been a Thursday to Sunday schedule, created a number of unexpected challenges. Our contracted guest room commitment included 40 rooms for Tuesday night, which were rooms we did not need and some renegotiation with the hotel was required. We also had too many guest room nights contracted for the last night of the conference (Sunday). Additionally, during our investigation for an off-site opening reception we found that securing a place for a Friday night, rather than a Thursday night reception was problematic. Finally, in shifting the schedule but keeping the vendor exhibits on Saturday, we ended up with a shorter dedicated time for our vendor exhibits.

One of the primary responsibilities for CPC is securing an opening speaker and planning the opening event for the conference. We had a very strong interest in holding the opening event at the Center for Civil and Human Rights, but found that the catering costs for that venue were far out of our budgetary reach. Other venues in the Atlanta area also proved too costly. The Atlanta History Center, while possible from a budgetary stance was unavailable on a Friday evening. Holding the opening event at the conference hotel is somewhat unusual for NASIG, but that is ultimately the decision that we made. The challenge and concern for CPC was that the space in which we held the event felt very crowded.

The conference budget was an expected challenge, and in order to stay within the budget we had to eliminate most food and beverage at break times and have a mixture of continental and full-buffet breakfast offerings. Long-time NASIG conference attendees have come to expect an abundance of food but the reality is that with rising costs, our dollars just do not stretch as far. Food and beverage at this conference cost about \$280 per person.

A final and significant challenge was with our audiovisual services. Our contract included dedicated self-contained WiFi internet service that would support 600 users. The service, utilizing routers and cell phone signals simply did not meet our needs and necessitated that we contract at the last minute with the hotel for our WiFi service. Additionally, the person who was to be our Senior Event Manager from Action AV resigned from the company a few days before the conference, requiring us to work with a new team with whom we were unfamiliar. While the AV team with whom we worked was outstanding and acted in our best interest at all times, the change did require a lot of last minute work on the part of CPC.

## **Recommendations**

While understandable that it is not always possible given the nature of our volunteer-based organization, it seems preferable to have CPC chair(s) and members

who live in the area where the conference is held. While much information is available online, there are times when an in-person conversation or a personal visit to a venue would be helpful in the planning process.

There need to be clearer guidelines on the roles and responsibilities between CPC, Non-Profit Help, and the Conference Coordinator, especially when it comes to contracts, hotel, and catering negotiations.

While there is a lot of documentation in the CPC Manual, there is still a lot that CPC chairs have to figure out on their own from year to year. There needs to be better and perhaps more formal ways for information and data to be communicated from one set of Co-Chairs to the next.

Keeping conference registration as low as possible is important, but we have seen a sharp rise in both audiovisual services and food and beverage costs over the last few years. Serious consideration is needed as to whether to continue to offer as many meals included in registration as we have in the past and whether or not an offsite venue for an opening reception is important to the membership. We don't have any specific suggestions for reducing audiovisual costs, but it is imperative to recognize how significant an expense it has become. Raising the cost of registration seems inevitable.

As mentioned previously, our audiovisual services presented some unique challenges at this year's conference. We strongly recommend that if the conference hotel has a preferred audiovisual services provider, every attempt be made to negotiate a reasonable contract with that provider or at the very least, contract with the hotel's provider for WiFi service. Our experience indicated that utilizing an outside vendor not only presented additional challenges, but we also incurred added charges related to WiFi service, travel, parking, and lodging.

## Mentoring Group Annual Report

Submitted by: Trina Holloway

### Members

Trina Holloway, chair (Georgia State University)  
Nadine Ellero, member (Auburn University)  
Sandy Folsom, member (Central Michigan University)  
Rachel Lundberg, member (Fairbanks North Star  
Borough Libraries)  
Adolfo Tarango, board liaison (University of British  
Columbia)

### Completed Activities

The Mentoring Group hosting the First-Timers reception, Friday, June 8. Several e-blasts were sent encouraging “first-timer” to attend the reception and to sign up for a mentor. Twenty-three “first-timers” signed up for mentors. Eighteen NASIG members volunteer to be mentors.

Over fifty NASIG members attended the reception.

### Budget

\$100 – four \$25 Amazon gift cards (prizes for raffle at the at First-Timers Reception)

Submitted on: August 20, 2018

## Program Planning Committee Annual Report

Submitted by: Violeta Ilik

### Members

Violeta Ilik, chair (Columbia University)  
Maria Collins, vice-chair (North Carolina State  
University)  
Marsha Aucoin (EBSCO)  
David Burke (Villanova University)  
Chris Burris (Wake Forest University)  
Christie Degener (University of North Carolina at Chapel  
Hill)  
Emily Farrell (De Gruyter)  
Mandy Hurt (Duke University)  
Gail Julian (Clemson University)  
Steve Kelley (Wake Forest University)  
Lisa Martinick (University of Iowa)

Apryl Price (Florida State University)  
Wendy Robertson (University of Iowa)

Ex Officio:  
Eugenia Beh (MIT), Marketing & Social Media  
Coordinator  
Tom Osina (Non-Profit Help)

Board Liaison:  
Angela Dresselhaus (East Carolina University)

### Completed Activities

#### 2018 Conference Program Slate

The principal business for the Program Planning Committee in 2017/2018 was to oversee the execution of the program for the 2018 conference in Atlanta, GA. This year, the PPC chair, Violeta Ilik, coordinated a marketing plan/calendar with Eugenia Beh to assure proper advertising for the programming activities. We identified topics for blog posts and emails to be sent to various listservs, and posted on social media. This collaborative effort gave good results and we recommend it for future conferences.

#### 1. Vision Speakers

Three vision speakers were selected by PPC and approved by the board. Sören Auer, who presented on his research: Towards an Open Research Knowledge Graph; Lauren Smith, presented on the topic of: Communities of praxis: transforming access to information for equity; and Lisa Macklin presented on the topic of Open Access: How Accessible Is It?

All three Vision Sessions were livestreamed on the NASIG website and recordings were made available.

#### 2. Preconferences

PPC identified topics for 5 preconferences and identified presenters. One preconference was cancelled due to the speaker not being comfortable with the publishing agreement. The preconferences that were conducted consisted of a three full day preconferences

and one half day preconference. Final list of NASIG 2018 preconferences:

- A Beginner's Guide to MarcEdit 7 - Speaker: Terry Reese - full day
- Introduction to Serials Cataloging with RDA - Speaker: Steven Shadle - full day
- Beyond "Set it and Forget it": Proactively Managing Your EZproxy Server - Speaker: Jenny Rosenfeld - half day
- Linked Data for Serials - Speakers: Amber Billey and Robert Rendall - full day All of the preconferences were well attended.

### 3. General Conference Program

PPC held one call for presentation proposals, received a total of 66 proposals, and selected 29 proposals for the program. The 30th session in the main program was presented by the invited speaker, a former NASIG student award winner Jeff Steely, currently the Dean of University Libraries at Georgia State University. There were 30 programs slated (6 sets of concurrent sessions).

Once again, PPC used ProposalSpace to collect and manage the proposals for the main program. The software is easy to use, and the company is very responsive to any issues. It is well worth the cost of this software to continue to use it.

PPC also used Sched again to create the program schedule. We used tags to identify session and make it easy for attendees to select which sessions they want to attend. Sched was well worth the minimal cost involved in using this software.

### 4. Great Ideas Showcase/Snapshot Sessions

The Great Ideas Showcase (i.e. poster sessions) and Snapshot Sessions were repeated this year. This year we had a very good turnout for both calls and those that were accepted participated in the program. Proposals were submitted using SurveyMonkey. Adjusting the

SurveyMonkey template to require the email of the proposers is recommended for ease of contacting them.

### 5. Student Spotlight Sessions

This new type of programming was proposed by the Student Outreach Committee and this was the second year of NASIG incorporating it in its program. The program allowed for current and recently graduated LIS students to give a brief presentation, like the Snapshot Sessions. SOC issued the call for proposals. Proposals were collected using SurveyMonkey. The proposals were reviewed by SOC and SOC made their selection. It was suggested that PPC issues and manages this call.

The Student Spotlight Sessions were scheduled to overlap with the Great Ideas Showcase. This is not recommended for the future programming due to the substantial interest in both sessions.

### 6. Vendor Lightning Talks

NASIG organizational members, Tier 1, and Tier 2 sponsors were invited to participate in Vendor Lightning Talks once again. Attendance was strong, and we recommend that the sessions be continued.

### 7. Informal Discussion Groups

In 2016, NASIG decided to hold informal discussion groups, which were scheduled for Thursday, before the conference officially opened. In 2018, we followed this practice again. PPC used SurveyMonkey to solicit discussion topics and leaders. Six groups were identified. All of the sessions were well attended and we recommend this type of programming to continue in the future.

### 8. NASIG on Demand: Features of the 2018 Conference

This year NASIG Board decided to make our excellent conference content accessible to more people. PPC chose 6 concurrent sessions that cover a variety of important topics touching on the conference theme of

“Transforming the Information Community.” Those sessions were:

- The New Dimension in Scholarly communications: How a Global Scholarly Community Collaboration Created the World’s Largest Linked Research Knowledge System - Dr. Robert Scott, Ralph O’Flinn, and Heidi Becker
- Cultivating TALint: Using the Core Competencies as a Framework for Training Future Information Professionals - Marlene van Ballegooie and Jennifer Browning
- Wrangle and Corral that License Agreement - Carolyn Carpan and Alexis Linoski
- The Heart of the Cycle: How Can Metadata 2020 Improve Serials Metadata for Scholarly Communications and Research? - Juliane Schneider
- Serials Clerk to Dean: 20 Years with a Head in the Clouds - Jeff Steely
- The Scholarly Commons - Maryann Martone

However, one of the sessions, The Heart of the Cycle: How Can Metadata 2020 Improve Serials Metadata for Scholarly Communications and Research? presented by Juliane Schneider was not well suited for a recorded session since the speaker decided to have an interactive session with the audience. The PPC chair acted immediately and requested from the AV company and the Board to schedule a different session to be recorded. At that point only option was the Snapshot Session. The available sessions are listed on NASIG blog:

<https://nasig.wordpress.com/2018/02/26/nasig-on-demand-nasigs-newest-conference-offering/>

All three Vision Sessions are included in the NASIG on Demand: Features of the 2018 Conference.

#### 9. Resources for Speakers and Presenters

At the Board’s request a new list of resources for speakers, including tips on creating presentation and how to do public speaking, was made available to all presenters. The page originally created for the 2017 conference was adjusted for this year conference.

Submitted on: August 13, 2018

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