# President’s Corner

Rick Anderson, NASIG President

This is the Coolest of Times

In many ways, 2009 is a scary time to be a serialist – but at the same time, I have to say that this is a really, really exciting time to be a member of NASIG.

We’re coming into the home stretch of our 25th year as an organization. It’s kind of mind-boggling to think about how much our corner of the scholarly information world has changed since NASIG was organized in 1985. Card catalogs, sending libraries massive printed renewal lists, Kardex files, doing all of our business by phone or by letter, looking up publishers’ addresses in Ulrich’s (in print, of course) – in a way all of those things sound like ancient history, but at the same time they seem to describe the way we lived just yesterday. As crazy as it is to think about how much our work has changed in the past 25 years, what’s even crazier is to think about how much it will change over the next 25. If only we could see forward as clearly as we can see backward!

Since we can’t, all of us who work in the serials information chain are trying to prepare for multiple
contingencies – multiple formats, multiple pricing and sales models, multiple budget scenarios, and a constantly shifting and expanding array of patron and customer expectations.

One of the many things that make NASIG great is the way it brings together people with so many different perspectives on these issues and so many different ideas for dealing with them. That blend of viewpoints and perspectives led directly to what I feel was one of the strongest programs we’ve had in years at the annual NASIG conference in Asheville in June. And I was by no means the only one who felt that way – a number of people took me aside and said the same thing, and I heard more positive comments at third hand as well. Big thanks are due to our excellent Program Planning and Conference Planning Committees for their diligent work, and especially to the speakers and panelists who brought such thoughtful and insightful presentations.

In fact, the Asheville meeting was a success by just about any standard I can think of – which is doubly impressive considering the budget constraints under which so many of us are suddenly operating, and the general mood of gloom and fiscal pessimism that has gripped so many of us (often for good reason). NASIG even came out slightly ahead financially, which we were not necessarily expecting. The institution of a new sponsorships program, energetically and skillfully administered by a group of fantastic volunteers, made all the difference there and will hopefully help us keep out of the red in future years as well.

This is perhaps as good a moment as any to send out to the membership a gentle plea for contributions. Asking for money is never comfortable, especially when many of us are dealing not only with shrinking institutional budgets but also with personal financial difficulty. To those of you who have donated to the organization in the past, I want to extend my personal thanks – not just in my capacity as NASIG president, but more importantly on behalf of the up-and-coming serialists whose conference attendance has been made possible by the NASIG Conference Student Grant, the Fritz Schwartz Serials Education Scholarship and the Horizon Award; the staff serialists who have benefitted from the Serials Specialist Award; the outstanding Mexican students whom we’ve had the pleasure to host at our conferences thanks to the Mexican Student Grant; the professionals from more meagerly-funded institutions who have been able to attend thanks to the recently-instituted Rose Robischon Scholarship; and the remarkable individuals whose contributions to the profession have been supported by the prestigious Marcia Tuttle International Award. Even with the promise of additional funding from sponsorship activities, the viability of these award and scholarship programs will continue to depend on a healthy flow of support from the NASIG membership. Donating is easy – just go to “About NASIG” on the NASIG website and click on “Make a Donation” (http://www.nasig.org/make_a_donation.cfm).

As I look forward eagerly to celebrating our 25th anniversary in Palm Springs, it seems to me that this is a humbling time to be president – a time for looking back at the amazing things done by my predecessors and by the NASIG membership in general, and for looking ahead at both the myriad opportunities and serious challenges that we face. I can hardly imagine a more exciting time to be involved with NASIG. Thanks to all of you for making this such a great organization.
Executive Board Minutes

April Conference Call
Joyce Tenney, NASIG Secretary

Date, Time: April 27, 2009, 12:03 p.m.-1:35 p.m. EDT
Place: Conference Call

Attending:
Jill Emery, President
Rick Anderson, Vice President/President-Elect
Peter Whiting, Treasurer
Char Simser, Past President
Joyce Tenney, Secretary

Members-At-Large:
Bob Boissy
Anna Creech
Kim Maxwell
Jeff Slagell
Sarah Wessel

Absent:
Virginia Taffurelli

Ex-Officio Member:
Kathryn Wesley, NASIG Newsletter, Editor-in-Chief
Angela Dresselhaus, Incoming NASIG Newsletter, Editor-In-Chief

1.0 Welcome (Emery)
Emery called the meeting to order at 12:03 p.m. She welcomed all to the meeting and reviewed the rules of order.

2.0 Secretary’s Report (Tenney)
Tenney reminded all to review the working calendar with their committees, and submit any updates prior to the June board meeting. Also, committee annual reports are due on Friday.

3.0 Treasurer’s Report (Whiting)
Whiting reported on the progress of conference registration. Special thanks to Mary Bailey for her work as NASIG registrar. Approximately $90,000 has been received in conference registrations to date, and $8,600 of this is preconference registration. Whiting reported that he would be working with CPC on the airport transportation form. It should be posted to the website in approximately a week.

4.0 ArcStone Update (Emery)
Emery reported that there had been difficulties with the conference registration database and other issues with the website. To address these issues she had sent a letter to ArcStone asking for a cost break on the monthly bills to compensate for the loss of service and problems. She had a call with ArcStone management and they will review the March and April bills and propose a compensation offer. ArcStone will also review the noted issues and determine how to fix the problems. ArcStone has committed to producing online training and webinars for committees. We will have a chance to review the training documentation before purchasing them. There was a general discussion of what ECC could do and what was needed from ArcStone.

ACTION ITEM: ECC will report any training needs to Emery and Creech.

Emery concluded the discussion with a report that the registrar is watching the registration database closely and will report issues as they arise.

5.0 A&R: Tuttle Award Discussion (Boissy and Emery)
Boissy reported on some confusion with the purpose of the funds for the Tuttle Award. He noted that the award description is vague, and this has led to confusion. It was agreed that the award funding is for
funding research not subsidizing NASIG conference attendance. It would be possible for the award winner to submit a program proposal for next year’s conference and receive funding for the conference in that process. There was discussion of the wording around the publication requirement and the desire to keep the intellectual content of the work either open access or have NASIG take some ownership of it.

**ACTION ITEM:** Boissy will work with A&R to tighten up the wording on the award and to clear up the publication and deadline for reports and publication issues. It will apply to the next award given, not the current award. After completion of the rewording and revisions, A&R will review the working calendar to see if any changes or additions need to be submitted.

It was agreed that the award winner would submit a report to the board at the January board meeting.

**6.0 CEC: Update on TEDSIG Event (Slagell)**

Slagell reported that 66 people attended the TEDSIG event. This was a large increase in attendance from last year and the evaluations on the program were positive. However, there was a problem with advertising NASIG support for the program. It was agreed that CEC should review their procedures to make sure all of the steps needed to ensure proper recognition for NASIG support and sponsorship are documented and distributed to committee members.

**ACTION ITEM:** Slagell will with work with CEC to verify procedures are documented and current.

**7.0 CPC: Updates/Questions (Wessel)**

Wessel reported that CPC did not have any questions for the board, but did express the concern that the process for hotel reservations that are paid for by NASIG be documented. Tenney will add information into the working calendar and CPC manual.

**ACTION ITEM:** Tenney will update working calendar and CPC manual on process for hotel reservations paid for by NASIG during the conference.

After brief discussion, it was agreed that the board wrap-up meeting would be Sunday morning from 8:00 a.m.-9:30 a.m.

**8.0 ECC: Ongoing Communication Concerns (Creech/Emery)**

We need to ensure that multiple ECC members have training and knowledge sufficient to respond to requests for support from NASIG members. Responses to such requests should include an expected resolution timeframe, and those tasked with responding to support requests should be sure to use their "out of office" settings.

**ACTION ITEM:** Creech will work with ECC to ensure that its manual is complete and up to date, and will work with the ECC co-chairs to ensure that they are delegating duties appropriately and providing support training to multiple committee members.

**9.0 LSOC: Informal Discussion Proposal (Slagell)**

Slagell reported that there had been some confusion on process for an outreach conference program and the committee needed to be in touch with the CPC/PPC in the future to verify conference plans, programs, and events. There was agreement that the group needed to develop a formal committee manual. Boissy expressed interest in assisting with outreach, once the documentation and framework were in place.

**ACTION ITEM:** Slagell will work with LSOC to get documentation in place.

**10.0 MDC: Institutional Membership (Boissy)**

Boissy reported on the progress of the institutional membership discussion. It was agreed that the rate would be $1,500, which allows 3 people from the institution to be full NASIG members with a calendar...
year membership. Emery noted that the next step would be to send it out to the membership for discussion after the conference. Maxwell will share the FAQ on institutional membership with the Bylaws Committee to get their opinion on which sections of the Bylaws would require revision due to this proposal. Emery will mention the proposal in her President’s Column and Wesley will post the topic on the “What’s New” section of the website. After the conference is over a discussion forum will be started for membership discussion and a vote taken over the summer.

11.0 Pub/PR: Sharing PR Responsibilities (Anderson)

Anderson reported that the current method of PR for the annual conference is chaotic and not working well. It was agreed that PR would develop the message with input from CPC and PPC and then others can distribute as needed and appropriate. It was agreed that additional discussion on this topic may be needed at the June board meeting.

12.0 PPC: Updates/Questions (Anderson)

Anderson reported that due to reduced attendance there is no need to repeat sessions. Emery asked the PPC to wait until May 8 to make the final decision. Anderson noted that PPC had asked if there were any “Hot Topic” items. Emery noted the issue of OCLC moving into the ILS market. Anderson will ask PPC to pursue this topic. Anderson noted that all sessions were slotted at this time.

13.0 New Business

Emery asked for any additional issues.

Slagell asked that the CEC manual be posted to the website. Emery asked Slagell to send a request to ECC and cc Emery and Creech.

Simser reported that the evaluations from the UnConference were very high and summary report will be issued.

The conference call was adjourned at 1:35 p.m.

Respectfully submitted,
Joyce Tenney
NASIG Secretary
Approved 5/21/09

June Meeting
Joyce Tenney, NASIG Secretary

Date, Time: June 3, 2009, 8:42 a.m. - 4:13 p.m.
Place: Renaissance Hotel, Asheville, North Carolina

Attending:
Jill Emery, President
Rick Anderson, Vice President/President-Elect
Peter Whiting, Treasurer
Char Simser, Past President
Joyce Tenney, Secretary

Members-At-Large:
Bob Boissy
Anna Creech
Kim Maxwell
Jeff Slagell
Virginia Taffurelli
Sarah Wessel

Ex Officio:
Kathryn Wesley, NASIG Newsletter, Editor-in-Chief

Guests:
Katy Ginanni, Incoming Vice President/President-Elect
Lisa Blackwell, Incoming Treasurer-in-Training
Carol Ann Borchert, Incoming Secretary
Patrick Carr, Incoming Member-At-Large
Steve Kelley, Incoming Member-At-Large
Christine Stamison, Incoming Member-At-Large
Eleanor Cook, Co-Chair, 2009 Conference Planning Committee
Steve Kelley, Co-Chair, 2009 Conference Planning Committee
Anne Mitchell, Co-Chair, 2009 Program Planning Committee
Morag Boyd, Co-Chair, 2009 Program Planning Committee

1.0 Welcome (Emery)

Emery called the meeting to order at 8:42 a.m. She welcomed all to the meeting and reviewed the rules of order.

2.0 Secretary’s Report (Tenney)

2.1 Approval of Board Actions

Tenney presented the listing of Executive Board actions. No amendments or edits were proposed. Slagell moved to accept the presented listing on Executive Board actions and Anderson seconded. The board voted unanimously to accept the listing of board actions as noted below.

NASIG Board actions February – May 2009

2/09 Board voted to support the CEC proposal to co-sponsor the ALAO-TEDSIG program.

2/09 Board approved the A&R promotion document regarding award announcements.

2/09 Board approved the pricing for the preconferences for the annual conference.

2/09 Board agreed to not share our membership list with other nonprofit organizations at this time.

3/09 Board agreed to accept the revision to the John Merriman Award, to have the award be a conference exchange only in the first year of the award (2010).

3/09 Board agreed to initiate a discussion forum on the proposed Vendor Expo on the membership discussion forums to obtain member comment on the proposal.

3/09 Board agreed to support the recommendation of the Financial Development Committee to leave our current banking arrangements as they currently are, since Bank of America is FDIC insured.

4/09 Board agreed to accept the Library School Outreach Committee’s proposal and create an Ambassador’s Program web page.

4/09 Board approved the institutional membership FAQ and set a timeline for establishing a discussion forum and publicizing the forum for member discussion.

4/09 Board approved the PDF form for the NASIG shuttle for Asheville Airport transportation service for the 2009 conference.

2.2 Action Items from April Conference Call

Tenney noted that most of the items were completed, or would be completed after the conference. Send any updates to her.

2.3 Working Calendar Updates

Tenney reported most committees have reviewed the working calendar. New updates should be sent to Carol Ann Borchert, the incoming NASIG Secretary. Each committee should continue reviewing the working calendar and submitting updates as needed.

3.0 Treasurer’s Report (Whiting)

3.1 Overview 2009 Budget and Expenditures to Date

Whiting reported that the budget looks good for this year. Expenditures are being closely monitored and we are on target for the year. We currently have 789 active members and last year at this time we had 733 active members. After discussion about various categories for expenditures, Whiting noted that he would review the categories and make any needed adjustments.

3.2 Donations Update

Whiting reported that donations are significantly down, due to the cumbersome donations process currently in
place. Simser noted that adding a quick link to the donation form might help. Blackwell made the addition to the quick link section of the website. Adding a donation box to the renewal form, the conference registration form and the initial membership application process on the web will be included in the list of programming requests being compiled by Buddy Pennington, the new web liaison. It was also suggested that there should be some additional publicity on the donation option. Anderson will add that item to his President’s Column for the upcoming Newsletter.

**ACTION ITEM:** A programming request for a donation option will be added to the listing of possible website enhancements.

**ACTION ITEM:** Anderson will add a section in his upcoming President’s Column on making a donation to NASIG.

**ACTION ITEM:** Blackwell will work with Simser to get additional links to donation form on the website.

### 3.3 Organizational Insurance Policies

Whiting reported on the status of NASIG insurance policies. Currently, we have two policies, one for officers and one for general liability. The current policy for officers has been renewed and will not expire until February 28, 2011. The policy for general liability is with a different company that is not very responsive to requests for information and policy information and documentation. Whiting suggested that we review other options for that policy. It was agreed that FDC would be asked to review options for this policy and make recommendations to the board.

**ACTION ITEM:** Emery will ask FDC to review options for general liability insurance and have a report and recommendation ready for the fall board meeting. Whiting will send information to FDC on our current policy and issues that have arisen with the current company.

### 4.0 Organizational Sponsorship Update (Simser)

Simser reported that we have $39,700 in organizational sponsorship donations. Dan Tonkery and Jill Emery assisted in the process with good support from CPC members. CPC was able to set up a wiki to keep everyone updated on process and progress. It was noted that several sponsors wanted to donate for a specific item. The program was a great success this year and, hopefully, next year will attract even more sponsors with the 25th anniversary celebrations.

It was noted that the organizational sponsorship program would be interwoven into the Vendor Expo, should that idea move forward. It was agreed that the comments on Vendor Expo via the discussion forum were positive and that the discussion had offered several weeks for comments.

Anderson moved that we accept the recommendation of the FDC to hold a Vendor Expo at the 2010 conference. Taffurelli seconded the motion and the vote was unanimous in favor of the motion. It was agreed that the cost of a table at the Vendor Expo would be $1,000, or if the sponsor had made an organizational sponsorship donation of $1,000 or more they would have the option of having a table at the Vendor Expo. Taffurelli moved that the cost of a table at the Vendor Expo would be $1,000, or anyone who donates $1,000 or more would have the opportunity to have a table at the Vendor Expo. Whiting seconded the motion and the vote was unanimous in favor of the motion.

### 5.0 Consent Agenda (All)

Emery presented the reports from the consent agenda: A&R, CEC, D&D, E&A, ECC, FDC, Mentoring, Proceedings, Pub/PR, and Translators Team. After brief discussion, D&D and E&A were moved off of the consent agenda for discussion. Emery noted the hard work of all committees and the board expressed their thanks to all who made it a successful year. Simser moved to accept the reports of the committees on the consent agenda with the thanks of the board. Maxwell
seconded the motion. The board voted unanimously in favor of the motion.

Boissy asked how D&D compiled the membership numbers. Blackwell explained the reporting process and limitations of the current technology on the available data. After discussion, it was agreed that D&D would reformat their report to have the inactive membership numbers in a separate heading to allow for a clearer view of current membership numbers.

**ACTION ITEM:** Blackwell will work with D&D to revise the membership number report.

Creech noted that a question had come into E&A from a member to allow for paper evaluation form submission. After discussion it was agreed that we would continue with the online only process. It was agreed that the evaluation form could be posted in advance of the conference in PDF, to allow for self printing to take notes at the conference; then attendees could just key in the information after the conference. The form would say “subject to change,” as some sessions are added at the last moment or speakers may change. It was agreed that the evaluation form and process should be promoted throughout the conference announcements.

6.0 Archivist (Tenney)

6.1 Job Description Needed for Recruitment

Tenney reported that Sheryl Williams has done an outstanding job as NASIG archivist. There was discussion on whether the archivist position should be recruited or appointed. Anderson moved that the position of NASIG archivist be a board-appointed position, with the term of appointment not to exceed six years. Wessel seconded the motion and the board voted unanimously in favor of the motion. It was agreed the archivist web page would be edited to reflect this decision, and it would be noted that an archivist-in-training may be appointed.

**ACTION ITEM:** Tenney will ask Williams to update the archivist web page up to reflect the appointment and term limit of archivist.

6.2 Assign a Liaison from ECC to Archivist to Help with Web Presence

**ACTION ITEM:** ECC will work with the archivist on web presence and other archives issues.

7.0 MDC (Boissy)

7.1 Charleston Attendee List

Boissy reported that MDC would be able to assist with the Vendor Expo solicitations via the Charleston attendee listing. Emery asked that they coordinate with the past president to avoid overlap and duplicate solicitations.

MDC will also be working on the possible institutional membership issues that may arise as the process to gain member input and vote moves forward.

**ACTION ITEM:** Boissy will ask MDC to work with past president on Vendor Expo issues for the 2010 conference.

8.0 N&E (Simser)

8.1 Number of Votes Candidate Receives Report to Candidate and Published

Simser reported that N&E had received a request to publish the number of votes received by candidates. It was agreed that N&E could report to individual candidates the number of votes they received, but not for other candidates, and the numbers would not be distributed to the membership.

Simser noted that N&E still needed to complete their manual. The section detailing the acknowledgement to candidates that their candidacy materials have been received and how the process moves forward is not detailed in their manual yet.
**ACTION ITEM:** Emery will work with N&E over the course of this year to insure that the manual is complete and posted on the website.

Emery noted that the committee appointment process for N&E is confusing and that the documentation for the process is not consistent. After discussion, it was agreed that the committee would consist of nine members per year, and five of the nine members should be new appointments to the committee. This will maintain consistency with the bylaws.

9.0 Newsletter (Emery)

9.1 Clarification on Committee Report Form

Wesley reported that there was some confusion on the May committee report. Some committees were treating it as a regular update and some committees were using it as an annual report. Traditionally, it has been an annual report and the board concurred that it should remain an annual report for the committee activities.

**ACTION ITEM:** Tenney will have committee report form updated to reflect that the May report is an annual report for committee activities.

9.2 ALCTS/ANO Liaison

There was some confusion on who should perform this task. After discussion, it was agreed that the publicist should fill this role. It was agreed that there might be a need for a publicist-in-training.

**ACTION ITEM:** Anderson will appoint a publicist-in-training.

10.0 Site Selection (Tenney, Anderson, Emery)

10.1 Proposed Sites for 2011 Conference

Tenney reported that approximately 100 proposals had been received and reviewed for the 2011 conference site. The proposals were discussed and it was agreed that the Site Selection Committee would review the following cities for 2011 conference and make a recommendation to the board: Buffalo/Niagara, Nashville, St. Louis.

Many good proposals were received and it was agreed that we would move as quickly as possible to establish the 2011 conference site, and then bid the 2012 to take advantage of the reduced rates in hotel and venue options in the current economic climate.

11.0 25th Anniversary Task Force (Maxwell)

Maxwell reported on the activities of the task force and noted that the release form for filming was being used and that it covered still photography as well as video filming. It was noted that if anyone objects to a photograph on the website, it can be removed.

12.0 Committee Size Discussion (Emery, Anderson)

12.1 Should Committee Size be Limited by Board or by Committee

The issue of committees self regulating size within the bounds of the bylaws was discussed. It was agreed that board liaisons should be communicating regularly with committee co-chairs to see if they need fewer or more committee members, and if all committee members are participating as needed. The timeline for committee appointments and the need for information on interest in continuing on a committee was discussed. It was agreed that liaisons would ask co-chairs to poll their committee members in January, in regards to their interest on continuing on a committee and relay that information to the vice president. Emery reminded all new committee chairs of the leadership document. Liaisons should be having monthly conversations with their co-chairs so issues can be dealt with in a timely manner. Committee co-chairs should be delegating work down to the committee members and encouraging the distribution of knowledge within committees.

**ACTION ITEM:** Vice president will send out an email in early January to all committee co-chairs, asking them to
poll their committee members on their desire to remain on a committee or any issues that may have arisen with committee membership or need for appointments.

13.0 CPC (Wessel, Cook, Kelley)

13.1 Final Conference Registration

Kelley reported that the final conference registration for the 2009 conference as of this week is 437. There are 29 non-members registered.

13.2 Conference Budget

Kelley reported that thanks to organizational sponsorship, we should end up breaking even or possibly making a slight profit. He requested that the final information on the money collected be forwarded to CPC for accounting within the conference budget. Whiting will forward the information to Kelley for the CPC budget.

13.3 Event Planning Update

Kelley and Cook reported on final arrangements for the Biltmore event and the Crest Center event. Both events look on target and should be good experiences for attendees.

The board expressed their appreciation for all of the hard work from CPC for what looks to be a great conference.

14.0 PPC (Anderson, Boyd, Mitchell)

Boyd reported that there are a total of 71 speakers in the 2009 conference program. She noted that no sessions were going to be repeated. Special thanks were noted for Michael Hanson from PPC for loading all of the flash drives with the speaker handouts prior to the conference. Cook noted that a question about using digital recorders for the sessions for the Proceedings recordings had come up, but was not resolved this year. It was agreed that the Proceedings editors should investigate what is needed and submit a budget request for this year. The board expressed their appreciation for a great program.

14.1 Change to User Group Slot in Light of Vendor Expo

Boyd questioned the need for user groups in light of the proposed Vendor Expo. After discussion, it was agreed that these two entities served different purposes, and would both be a part of the 2010 program.

14.2 LSOC Programming for 25th Anniversary Conference

Library school reunions were slotted as informal discussion groups this year and it seemed to be a good fit in the program. It was agreed that PPC would have early discussions with LSOC to insure that advertising and information is consistent.

14.3 No Repeat Program Policy Implementation

Boyd noted that the current program selection process gives strong preference to the program not having been presented elsewhere. After discussion, it was agreed to delete this requirement, and for copyright issues for the Proceedings it was agreed that every effort will be made to obtain copyright clearance to publish the paper in the Proceedings, but if it is not available, a note will be placed in the Proceedings to record where the paper may be found.

ACTION ITEM: PPC will update their manual to reflect the change in the policy on selection of programs that have been presented at other venues.

14.4 Evaluation of Reimbursement Guidelines to Limit Number of Speakers

Boyd reported that the current policy on speaker reimbursements for panel presentations is expensive and she suggested that reimbursement for panel presentations be limited to three speakers. Emery moved to accept the recommendation of PPC to normally limit the number of reimbursements for strategy speakers in a single presentation to three.
However, PPC may make exceptions as needed with the approval of the board. Slagell seconded the motion. The motion was passed unanimously.

**ACTION ITEM:** PPC will update their manual to reflect the change in speaker reimbursements.

**ACTION ITEM:** PPC will update the website to reflect the change in speaker reimbursement and the call for proposals.

**ACTION ITEM:** Tenney will update the reimbursement document to reflect the change in speaker reimbursement.

**14.5 Speaker Guidelines for Multiple Sessions**

After discussion it was agreed that speakers would generally not be booked for multiple sessions at the same conference. However, PPC may recommend specific exceptions to the board.

**14.6 PPC/CPC Coordination Outlined in Manuals**

There was concern expressed that there may be some ambiguity in the PPC and CPC manuals in the areas of conference publicity. Simser recommended that PPC and CPC review the chart of responsibility and revise as necessary to clarify any ambiguities. Both the CPC and PPC manuals should be updated to reflect any changes.

**15.0 Publicity (Anderson)**

**15.1 Should Publicity be Distributed to Committees or Centralized**

Anderson discussed the issues surrounding the current process for NASIG publicity. It was agreed that official NASIG publicity for the large national and international listservs, and media outlets should be funneled through the NASIG publicist. The Publications/PR Committee will produce a template for the announcements. Announcements within NASIG and in a regional area may be distributed by the individual committee, after the announcement has been reviewed and approved by the NASIG publicist. Each committee shall have in their manual a notation to reflect this process. Boissy will produce a notice to add to each manual.

**ACTION ITEM:** Boissy will draft a notice to reflect the publicity process for NASIG committees.

**ACTION ITEM:** All board liaisons will verify that the notice on the publicity process has been added to the committee manuals.

**16.0 Conference Proceedings Follow-Up (Emery/Simser)**

**16.1 Open Access Model**

Simser and Emery reported on investigations in open access publishing options for the NASIG Proceedings. Two possible options were discussed. The most likely model is from Kansas State, as they are willing to offer some assistance and guidance in the process. The pros and cons of adopting an open access model were discussed and it was agreed that a task group would be asked to review options and present a draft RFP for moving the NASIG Proceedings to an open access publishing model. A possible 2011 start to this process would be investigated. FDC would be asked to investigate the possibility of an IMLF Grant. The members of the task force will be as follows:

Borchert, chair  
Creech, member from FDC  
Simser, ex officio

The task force will report at the January board meeting.

**ACTION ITEM:** The Proceedings Open Access Task Force will present a report at the January board meeting.

**17.0 Committee Chairs Leadership Development (Emery)**
17.1 Harping

Emery reported that the document detailing the plan that starting with the 2009/2010 period, committee chairs and liaisons are asked to institute an organizational structure to their committees to insure productivity of all committees, and the development of leaders within NASIG, is posted and should be followed by all committees. Each liaison should be aware of the document and verify that co-chairs are aware of the document and moving toward this model.

**ACTION ITEM:** Each liaison should work with committee co-chairs to insure that the committee chairs leadership development document is being followed.

18.0 Website Liaison (Emery)

Emery reported that Buddy Pennington will be the website liaison. He will be compiling a listing of issues and enhancement requests over the next few months and will report at the fall board meeting.

18.1 Meeting at Conference

Simser reported that a time has been set aside at the conference in the Internet Café for website administrative training. All of the committee co-chairs and members who need to use the administrative functions of the website are invited to attend.

18.2 Contract Revisions with ArcStone

Emery discussed the issues with the current contract and lack of resolution with ArcStone. It was agreed that it was time for a revision of the contract. The current contract is valid until the end of October, and any discussions with ArcStone should happen before the end of the contract. It was reported that a new version of the interface will be released soon and there will be additional costs, should we decide to adopt the upgrade. It was agreed that the upgrade should be investigated and reviewed.

**ACTION ITEM:** Blackwell will work with Pennington via web conferencing to review the administrative functions and issues with the current website.

**ACTION ITEM:** Pennington will present a prioritized listing of requested enhancements and fixes to the website at the fall board meeting.

**ACTION ITEM:** The Arcstone contract will be reviewed and Arcstone will be notified that we will be requesting revisions to the contract.

**ACTION ITEM:** Blackwell, Pennington, Whiting, Mary Bailey and other selected website administrative users will review the upgrade to the website and determine if it would be advantageous for NASIG to move to the new upgrade.

**ACTION ITEM:** The revision to the contract will have specific language to address a mutually agreed upon version of data for NASIG archiving purposes upon termination of contract.

19.0 Other Business (All)

Simser reported on the Conference Calling Task Force. She noted that the task force needed a clarification to their charge in order to proceed. They had questions on the size of the calling groups and if there should be web conferencing available. It was agreed that it should just be for committee calls and web conferencing is not required. Simser will forward the complete list of questions from the task force to the board and the task force will finalize their report this summer.

Emery noted that the “Meet the Board” session at the conference will be during the opening reception this year. She encouraged all current and incoming board members to use the time to meet NASIG attendees.

The board discussed whether A&R would offer the Champion Award next year, which is usually offered every 5 years. It was decided that we would offer this award for next year.
**ACTION ITEM:** Stamison will work with A&R to make sure the Champion Award is on their list for the 2010 conference awards.

Emery called for any additional items. None being received, the meeting was adjourned at 4:13 p.m.

Respectfully submitted,
Joyce Tenney, NASIG Secretary
Drafted 6/16/09, revised 7/28/09 cab
Board approved with correction: 8/7/09

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**Treasurer’s Report**

Peter Whiting, NASIG Treasurer

NASIG’s finances continue to remain stable. The balance sheet below reflects our income and assets as of August 14, 2009. Current assets are $310,407.25.

**2008 committee expenses on track.**

<table>
<thead>
<tr>
<th>2009 NASIG budget expenditures</th>
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<tr>
<td><strong>as of August 14, 2009</strong></td>
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<tr>
<td>25th Anniversary Task Force</td>
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**Balance Sheet 8/14/2009 (Includes unrealized gains)**

As of 8/14/09

<table>
<thead>
<tr>
<th>ASSETS</th>
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<td>Cash and Bank Accounts</td>
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<td>Cash</td>
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<td><strong>TOTAL Cash and Bank Accounts</strong></td>
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<td>Investments</td>
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<td>Charles Schwab</td>
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<tr>
<td><strong>TOTAL Investments</strong></td>
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<tr>
<td><strong>TOTAL Cash and Bank Accounts</strong></td>
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<tr>
<td><strong>TOTAL ASSETS</strong></td>
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<td><strong>TOTAL LIABILITIES &amp; EQUITY</strong></td>
<td>$310,407.25</td>
</tr>
</tbody>
</table>
Call for Nominations
June Garner and Eleanor Cook, N&E Co-Chairs

The Nominations & Elections Committee invites nominations for vice president/president-elect and three member-at-large board positions. Information on each office is found at: http://www.nasig.org/about_adminofficers.cfm.

If you have someone in mind that would be great for a NASIG office, including yourself, please complete the electronic nomination form available at: http://www.nasig.org/survey.cfm?pk_survey=19. You will need to login using your NASIG login and password. All nominations are anonymous even though you are logged in. You may submit multiple nominations for one office. If you have trouble with the online form, please send nominations to June Garner, N&E co-chair at jgarner@library.msstate.edu.

All active NASIG members are eligible for nomination except current members of the Nominations & Elections Committee http://www.nasig.org/committee-nominations-and-elections.cfm.

The deadline for nominations is October 12, 2009.

Please contact the Nominations & Elections Committee chairs if you have any questions:
June Garner - jgarner@library.msstate.edu or Eleanor Cook - cooke@ecu.edu.

NASIG and ASA in Collaborative Agreement

This summer, NASIG and the Association of Subscription Agents and Intermediaries (ASA) entered into an informal agreement to exchange information of mutual interest. This agreement may also serve as a basis for future collaboration.

NASIG and ASA have agreed to share information by means of both organizations’ websites, events calendars, and newsletters. In addition, twice a year each organization will provide the other with a summary of key activities and developments to be published on their websites and in their newsletters.

The agreement includes one free reciprocal registration for an administrative officer or board member to the sister organization’s annual conference, not to include travel or accommodation.

A future possible expansion of the agreement might be to include complimentary reciprocal memberships if NASIG moves to create an organizational membership category.

Members Invited to Discuss New Membership Category
Rick Anderson, NASIG President

NASIG is considering establishing a new membership category: institutional member. This would allow an organization (of any type) to join NASIG as an institutional member for $1,500. The membership fee would include individual memberships (with full privileges), plus registration at the current year's conference, for any three individuals within the member organization. It would also allow the organization to purchase a Vendor Expo table at a discounted price of $500.

To do so would require a change in the bylaws, so members are invited to participate in a discussion on the topic prior to a formal vote via ballot in October. While indefinite discussion is allowed (and encouraged), the formal pre-vote discussion period will end on September 30, 2009. To facilitate the discussion, we have created a discussion forum with this topic, and posted an FAQ document to start the ball rolling. Please go to the NASIG website and click on "Discussion Forums" to see the new forum (http://www.nasig.org/members_forums.cfm) and contribute to the conversation.
25th Conference (2010)

Call for Proposals
An Oasis in Shifting Sands
NASIG at 25
June 3-6, 2010, Palm Springs, California

The 2010 Program Planning Committee (PPC) invites proposals and/or program ideas for preconference, vision, strategy, and tactics sessions. The program planners are interested in hearing from publishers, vendors, librarians, and others in the field of serials and electronic resources about issues relating to scholarly communication, publishing, licensing, and cataloging.

This call for proposals will close on September 25, 2009. Inquiries may be sent to the PPC co-chairs, Morag Boyd and Anne Mitchell at: prog-plan@nasig.org.

Please keep in mind the following when submitting an idea or program proposal:

- The Program Planning Committee will review all submitted proposals for their content and timeliness.
- PPC will treat all submissions as suggestions and guideposts. PPC may work with potential presenters to blend or refocus proposals to maximize their relevance to attendees and avoid duplication.
- Proposals should name any particular products or services that will be the focus of a presentation, but keep in mind that programs should not promote a specific institution, product, or service.
- Proposals based on descriptive and experimental research findings are encouraged.
- Time management issues generally limit each session to two speakers. Panels of four (4) or more speakers must be discussed in advance with the PPC (prog-plan@nasig.org).
- Proposals may be suggested as one type of session and/or format and ultimately be accepted as any one of the other types of sessions or formats; this decision is the purview of the Program Planning Committee.
- Vision and strategy speakers presenting original content are required to produce a written paper for the conference Proceedings.
- NASIG has a reimbursement policy for conference speakers whose organizations do not cover expenses. Details about reimbursement are available on the NASIG website.
- The Program Planning Committee hopes to notify applicants of the status of their proposals in December 2009.

Organizational Sponsorship Opportunities for the 2010 Conference
Jill Emery, Past President 2009/10

At the 2010 conference, NASIG will be offering a limited vendor exposition period before the opening of the conference. This event will be Thursday, June 3, 2010, from 1:00-4:00 p.m. in the conference area of the Rancho Las Palmas Resort in Palm Springs, California. Interested sponsors are invited to fill out and submit the vendor exposition form and review the other sponsorship opportunities available. Many of the sponsorship opportunities include the ability to participate in the vendor exposition. These forms can be found at http://www.nasig.org/conference_sponsorship.cfm.

Electricity will be provided to each exposition table but table size and wireless Internet access will be provided on a first come/first serve basis. Any group/organization interested in having an exposition table is encouraged to submit their forms and payments as soon as possible in order to guarantee their desired exposition set-up. We look forward to all sponsors participating in our 25th anniversary conference!
24th Conference (2009)

Conference Photos

Welcome to NASIG 2009!

Angela Dresselhaus, Chris Brady, Joseph Thomas, and Jenni Wilson listen intently at the new committee chair orientation session.

Lisa Blackwell (center) teaches committee chairs in the website training session.

Crowd scene at the First-Timers & Mentoring Reception.
More first-timers and mentors.

Old timers (so to speak) at the First-timers reception: Steve Kelley, Clint Chamberlain, Steve Murden, and Christie Degener.

CPC members happily waiting to register conference attendees.

CPC co-chairs Eleanor Cook and Steve Kelley.

CPC member Christian Burris taking a rare opportunity to sit.
 Historian-with-a-stick Kenneth Richards spoke about the history of Asheville.

Prez Jill Emery is ready to ride the rapids. (Photo by Char Simser.)

25th Anniversary Task Force members serenade the audience.

The Thomas Wolfe Memorial, just across the street.

Break time on the Renaissance patio.
The Biltmore. Breathtaking!

Outgoing Prez Jill Emery and incoming Prez Rick Anderson.

Touring that gigantic house really works up an appetite!

Jeff Slagell promises to wear his prize shirt at next year’s conference in Palm Springs, CA.

NASIG members starting the Biltmore tour.
Navigating Your Way through the E-Journal Rapids

Tina Feick, Harrassowitz; Deberah England, Wright State University; Jeff Aipperspach, Serials Solutions; Kim Steinle, Duke University Press; Chris Beckett, Atypon

Reported by Janie S. Jones

Our raft included representatives from the primary players in the e-journals supply chain: the publishers and platform hosts, vendors, and librarians. Participants had completed a pre-program survey, and our answers were provided as a handout. In this survey, we shared concerns, frustrations, desired improvements in the e-journal process, and more. It made for interesting reading later that night! Susan Davis introduced the session by comparing the e-journal and print journal environments. The e-journals world includes more players, pricing models, deals...more problems! While serials have always been complex, the pace of activity has increased, everyone expects everything yesterday, and the work requires new skills and many new tools. A list of tools includes: A-Z list management, link resolvers, licenses, usage data collection, and spreadsheets ad infinitum.

Deberah England identified the various players in an increasingly complex supply chain and observed that since it is still developing, there is volatility in this marketplace. Publishers create content. The “Big Four” publishers, Elsevier, Springer, Taylor & Francis, and Wiley, claim 50% of the market. Aggregators compile content from multiple sources to produce a collection of titles or a database. Reproduction services such as BioOne and Project Muse provide access to collections of resources published elsewhere. Third-party platform hosts, e.g., Atypon, Highwire, etc., provide access to content via server platforms and support services. Most provide a librarian gateway and access to usage statistics. Subscription agents serve as purchasing and service intermediaries between publisher and institutional subscriber. Brokers such as OhioNET, MLC, Lyrasis, etc., serve as purchasing intermediaries between service provider and institutional subscriber. A-Z list service providers, such as CASE, EBSCO A-Z, Serials Solutions, and TDNet, offer discovery lists with links to subscribed resources regardless of how a resource is hosted or packaged. ILS and ERMS vendors, e.g., 360 Resource Manager, CUFTS, ERM, Gold Rush, Verde, etc., install and maintain subscriber bibliographic and purchasing systems. They provide potential for loading data from external sources.

Kim Steinle from Duke University Press explained this publisher’s role in the e-journals process, identifying some of the challenges of offering print and online. In 2005, Duke began a Library Relations program in order to engage with and learn from libraries. As a result, Duke has streamlined site license negotiations and has created its Library Resource Center, where information such as pricing, titles lists, URLs, date ranges, etc., is available.

When Duke migrated to a print+online product, staff was not increased, but work was redistributed. Duke strives for excellent communication with the customer, and takes pride in strong customer service. They ordinarily have a grace period of 90 days since subscribing to and completing the activation process can be quite lengthy.

Rocky shoals that Duke faces include communicating product options, providing relevant information, URLs, etc., processing orders quickly, and providing immediate access. Perhaps most challenging, for everyone, is keeping current with new initiatives and technology, such as standards like COUNTER, SUSHI, ATHENS/Shibboleth, institutional identifiers, and SERU. Even Duke, with only five electronic journal collections, has five site license types, and Steinle indicated the hope is that Duke can consolidate or eliminate site licenses.

Chris Beckett, from Atypon, led us in a lively ride through the rapids from a platform perspective. Atypon hosts many familiar names in e-journals, such as ACS,
JSTOR, BioOne, and it partners with CrossRef. Beckett opined that library collections used to be assessed by quality, comprehensiveness, and relevance to the institution, but librarians ceded this responsibility to publishers. Now libraries are organized by imprint, so the information is stored in publisher silos. New tools have been developed to address this problem, such as federated search engines, link resolvers, A-Z lists, and even the OPAC.

For the Google generation, these interfaces are obstacles to the information. Beckett made the point that publishers suffer from “featuritis,” the new-features arms race, because their focus has moved from users to competitors. After a period of useful optimization, publishers continue to add features, but users find the additional features user-unfriendly, and a hindrance.

Tina Feick of Harrassowitz enlightened attendees on the many ways in which an agent can help librarians. She noted that e-journals present agents with opportunities for providing new services in resource identification and evaluation, license management, activation of electronic resources, resource discovery and access tools, usage tracking, negotiation, and e-package sales. All of these add complexity and require increased staffing with higher skills. In addition, since it is all quite new, little is systemized. Pricing is customized for each customer, and negotiations may include different format types, e-books, e-journals, e-databases; subscriptions; backfiles, and differing titles lists. Negotiations can be quite lengthy, as well. Feick encouraged librarians to tell their agents if they are making a deal directly with the publisher, because it could affect pricing from the vendor. In addition, archival rights are a continuing problem. She advised participants to learn their institutions’ policies regarding e-resources, get involved in the deal negotiations, work closely with agents, and remember to keep the user in mind. Agents also have goals, including seamless fast ordering for e-resources, access without interruption, and e-resource information exchanged through EDI transactions.

Jeff Aipperspach of Serials Solutions discussed e-resource tools, such as the 360 Resource Manager from Serials Solutions. This service uses centralization; data import; bulk editing; normalization, pointing to the correct title; and development of a knowledge base to meet customer needs. He advocates industry standards, because they improve interoperability and save time and money. He suggested that budgeting for maintenance and management of e-resources needs to be a separate category in planning and budgeting. Concerning the value of a library to an organization, in addition to branding, Jeff suggested adding pricing data to search results to inform users of the value of a search, and collecting information about the average value of searches and publicizing it. He noted that the Friends of the Library at Meriden, Connecticut, collect this information two weeks a year, and publish it, which has helped the library maintain funding in these times of economic stress.

The focus of the session was then directed to workflows.

Deberah England, Wright State University, addressed workflows in the electronic environment. Since workflows are partly sequential and partly parallel, she suggested developing a workflow for the mainstream, and a checklist for other processes. She shared the results of a study of Ohio academic libraries, in which the researchers were looking for commonalities in workflow processes. They discovered that workflows were not commonly established; that many departments might be involved in the e-resources workflow; and that obstacles to developing workflows include time to learn new systems, volume of workload, staff changes, and lack of training. Deberah uses OCLC Link Evaluator to check the A-Z list. She uses a claiming function to create a report to use for checking.

Susan Davis from the University at Buffalo provided not only a general overview of the e-resource life cycle, but also a case study from Buffalo, which included their “10-step program,” their checklist for processing a new e-journal. She reminded us that documentation is a good thing! An internal listserv is a useful tool for keeping
the whole library informed about anything regarding serials—status, agreements, etc. Susan was enthusiastic about a tracking system for reported problems that Buffalo uses, and she identified several that are available, such as Bugzilla, and RT (Request tracker). Susan observed that MS Excel is a librarian’s new best friend.

The panel wrapped up this informative session on e-journal management by revisiting topics in which there was continued interest. Participants commented on a range of issues: Is archival access being given the attention it should? SERU is one aid in the burgeoning problem of handling license agreements. Librarians were advised to pay attention to indemnity clauses in license agreements. It would also be helpful if publishers added a SERU logo to their web pages, similar to the logo indicating COUNTER compliancy. In addition, the library community remains concerned about the lawsuit between Georgia State University and publishers. Lastly, to maintain funding, use the annual report to highlight budgetary points, such as increasing journal costs or the average cost of a search, or indicating how the library user benefits from library services.

SCCTP Electronic Serials Cataloging Workshop

*Linda Geisler and Esther Simpson, Library of Congress*

Reported by Jan Mayo

Ten librarians attended the NASIG preconference, “SCCTP Electronic Serials Cataloging,” offered by two presenters from the Library of Congress, *Linda Geisler* and *Esther Simpson*. This informative day and a half-long preconference consisted of Geisler and Simpson taking turns explaining sections of the Electronic Serials Cataloging Workshop Trainee Manual. Many sections included group or individual exercises designed to help us understand the various concepts. The presenters encouraged questions and welcomed discussion.

Linda and Esther introduced themselves as two members of the ISSN Publisher Liaison Section at the Library of Congress and told the attendees about their current work and backgrounds. Then they asked attendees what they hoped to gain from the course. Linda and Esther wrote our responses on a flip chart. Responses included needing to learn how to catalog e-serials, plus various aspects of the actual cataloging, such as the difference between an e-serial and an integrating resource and the separate record versus single record approach. They used this list as a touchstone throughout the course and referred back to it to ensure all our questions and concerns were addressed.

Linda began with Session 1, which was an overview of the course’s goals and included definitions for key terms. The session ended with a more difficult than expected exercise on determining whether several titles were either serials or integrating resources. The correct answer was sometimes unexpected and occasionally uncertain.

Session 2, “Cataloging an Online Serial,” followed a specific title through the AACR2 rules, CONSER guidelines, and MARC 21 fields required to create an original MARC record. Even though Esther opted to cover some of the material in a later section, this session took up a large portion of the first day of the workshop.

Attendees began with the fixed fields and worked their way through the variable fields to the linking fields at the end. Slides were used to illustrate each point and many questions were asked to ensure an understanding of the material. At the end of the session, the attendees were split into three groups to work through cataloging an e-serial title together, an exercise that prompted a lot of questions and discussion that helped everyone to understand the complex material better.

Having decided to do Session 3 last, Linda skipped to Session 4, “Online Versions.” This section looked extensively at the single record versus separate record approaches to cataloging e-serials. It ended with several slides showing how to create a single MARC record for both formats, as well as how to create a
separate record for an e-serial title by using the record for the print title and what changes might need to be made to the print serial record.

The last session for the first day of the preconference was Session 5, “Changes that Affect Cataloging.” Esther led this session, which covered the most common changes that can affect cataloging: change of the online location; change of format; and, as with print serials, title changes. Perhaps the most difficult concept to understand about e-serials was title changes, because an earlier title can simply disappear when a later version of the e-serial is posted. Finding these title changes and denoting them correctly was one of the hardest exercises the attendees worked on.

Linda opened with Session 6, “Case Studies,” on the second day of the preconference, detailing six problems catalogers may encounter when trying to catalog an e-serial:

1. Serial lacks dedicated page – Possible solutions: catalog each title separately, giving directions for the serial’s URL; identify an anchor URL that can get the patron to a specific part of a list of titles; or use multiple URLs;
2. No back issues – article database – Is it truly a serial?; if so, and it has no archive, base the description on the current issue;
3. Multiple language editions – catalog each title separately; or catalog them both on one record with a parallel title; or catalog only the language appropriate to your library;
4. Online supplement to a print serial – determine if a print serial supplement deserves a separate record the same way you would determine if a serial needs a new record; if not, a note and a URL can be added to the print record;
5. Problematic URLs – you should never put session or institution-specific URLs into OCLC master records because they will not work for everyone; if possible, provide access to the home page so that the patron can search for the title from there.

6. The Buried Title Change – Online publishers sometimes wrap the current title around older full-text articles; you must find and account for all title changes.

Esther wrapped up the workshop with Session 3, “Aggregations/Packages,” which covered the many ways e-serials can be accessed and discussed how an aggregator-neutral record can be used to collect all accesses to an e-serial in one place for ease of access by patrons.

While this was a densely-packed presentation, the participants seemed to agree that it was helpful that NASIG provided a day and a half for this preconference. Even though attendees’ brains felt full, everyone was pleased with the presenters and what they had imparted about electronic serials cataloging.

Basics of E-Resource Licensing

Selden Durgom Lamoureux, North Carolina State University Libraries; Clint Chamberlain, University of Texas

Reported by Catherine Seago

The “Basics of E-Resource Licensing” was a half day preconference. Selden Durgom Lamoureux, North Carolina State University, and Clint Chamberlain, University of Texas at Austin, led the workshop. They laid out an ambitious schedule including all the basics of licensing, from defining what you want from the license, the primary elements of the license, negotiating clauses, emerging standards, alternatives to licensing, and ERM mapping.

Although Selden and Clint did not cover everything on the agenda, they addressed the important points and offered ways to follow up on the items that were not covered during the workshop. Selden and Clint concentrated on what your institution wants out of the license, the elements that should be in a license, and what terms should be questioned.
They offered two hands-on exercises which were particularly helpful to license rookies. One was identifying the desirable and undesirable parts of a license and the other was rewriting unacceptable parts of a license. Selden and Clint were knowledgeable instructors who encouraged participants to ask questions and raise issues they faced at their own institutions. In addition, they encouraged the publishers present to share their viewpoints.

A significant amount of the value of the workshop came from hearing a variety of participants discuss the diverse licensing challenges they face and what strategies might be employed to resolve them. Participants in this workshop definitely walked away with a better understanding of how a license should work. Furthermore, participants now have a handy toolkit to use and tips on which NASIG sessions to attend in the future to increase their licensing knowledge. This preconference was well worth the time and could easily be repeated at a future date.

### Vision Sessions

**Ambient Findability: Libraries, Serials, and the Internet of Things**

*Peter Morville, Semantic Studios*

Reported by Kelly Smith

**Peter Morville**, president of Semantic Studios, gave the opening address of the conference. His presentation slides can be viewed at: [http://semanticstudios.com/nasig.pdf](http://semanticstudios.com/nasig.pdf).


Information architecture is:

- The structural design of shared information environments.
- The combination of organization, labeling, search, and navigation systems in websites and intranets.
- The art and science of shaping information products and experiences to support usability and findability.
- An emerging discipline and community of practice focused on bringing principles of design and architecture to the digital landscape.

Morville stressed that for librarians, there is a responsibility to educate clients about what librarians do. To achieve this, he suggested four goals to keep in mind when designing our library websites:

- Offer multiple ways to find the same information.
- Do everything you can to “bubble up” information to the surface.
- Design with purpose and audience in mind.
- Strive for the “user experience honeycomb.”
He also suggested three questions to ask ourselves:

- Can our users find our website?
- Can our users find information in our website?
- Can our users find information despite our website?

Our ultimate goal in the future is “ambient findability,” or, “the ability to find anyone or anything from anywhere at any time.” According to Morville, “perfect findability is not attainable” given the massive amounts of information online, but librarians need to “create bigger needles” by finding ways to leverage our metadata and by reducing out-dated content.

Searching will still be the key in the future, but librarians need to stop trying to get people to do Boolean searching and focus on simpler ways to do complex searches. One example of this is “pearl growing”: finding a relevant result and using its metadata to find related results. Other examples include “faceted navigation,” “best bets,” “auto-suggest,” and contextual search. Librarians also need to improve metasearch capabilities; incorporate social tagging in the metadata; and offer more tools for finding music, images, video, and “other non-text formats.”

Sprinkled throughout Morville’s presentation were suggested readings. These included:

- *The Transparent Society*, David Brin
- *Everything is Miscellaneous*, David Weinberger
- *How Buildings Learn*, Stewart Brand


- “A Manifesto for Networked Objects,” Julian Bleecker

- *Shaping Things*, Bruce Sterling

- *Everyware*, Adam Greenfield

- “Ubiquitous Findable Objects,” Peter Morville

- *Don’t Make Me Think*, Steve Krug

**Measuring the Value of the Academic Library: Return on Investment and Other Value Measures**

*Dr. Carol Tenopir, University of Tennessee*

Reported by Kathryn Johns-Masten

Carol Tenopir gave an informative session which provided a glimpse of results from a multi-phase project that seeks to measure the value of academic libraries based on return on investment (ROI). Demonstrating and quantifying libraries’ importance to the institutions that fund them and to their users is becoming more important, especially in times of economic hardship. Tenopir illustrated methods to gain a better understanding of how people use the data they gather from the library. What is the end product they create with this information and guidance they receive from librarians? Libraries need to do a better job of showing their end product. Institutions want to know what they gain for every dollar spent on their libraries.
Phase one, completed in 2008, consisted of a case study of one university to determine the return on investment of grants provided to faculty. Factors studied were faculty use of citations, grant success rate using citations from the library, and grant income. The goal was to determine what grant income was generated by using citations obtained from the library. Phase two tested the model used in phase one, which consisted of a narrow focus on nine different universities in eight countries. Problems with differences in terminology, variations in data that universities keep, differing fiscal years, variations in academic years, and language slowed the study. The results of the study should be released in late summer/early fall 2009. Phase three will branch out to look at grants and research, teaching, and student engagement. It will look at a variety of returns and finding ways to quantify these to show the administration the value the library provides to the institution.

This research goes a long way toward the goal of demonstrating that library collections contribute to income generating activities. An ROI calculator will be available to academic libraries as well as the formula used in the study. It will be made available through the Academic Research Libraries website and the University of Illinois digital repository. While this study focuses on electronic collections, individual libraries may want to change this or focus on print and electronic separately. The current results show that academic library collections help faculty be productive and successful. The library helps generate grant income, which increases the prestige of the institution. Electronic collections are valued by faculty and needed. Future studies will seek to tie measures to the mission of the institution; measure outcomes not just inputs; and provide quantitative data to show ROI and trends. Quantitative data tells a story and each library needs to narrate their story to their institution.

What Color Is Your Paratext?

Geoffrey Bilder, CrossRef

Reported by Andrée Rathemacher

Geoffrey Bilder is the director of strategic initiatives at CrossRef, a non-profit membership association of publishers. Their mission is to improve access to published scholarship through cooperative technologies such as DOIs (Digital Object Identifiers). Bilder discussed problems in identifying trustworthy scholarly content delivered via the Internet, and proposed CrossRef’s CrossMark service as one solution.
Bilder began by highlighting a problem that both publishers and librarians face: helping researchers identify trustworthy information in the online environment at a time of growing distrust of intermediaries. Publishers find their value proposition being questioned as their brands are hidden due to intermediation by Google; their content is cloistered behind pay walls; and the editorial services they provide are not readily visible. Likewise, the value added by libraries through the selection and organization of quality information has been brought into question by the prevalence of free search engines, and the shift from ownership to access, which often obscures the libraries’ role as providers of scholarly information.

Bilder next compared the nature of trust on the Internet with scholarly trust using a framework developed by Kieron O’Hara in *Trust: from Socrates to Spin*. There is a problem with trust on the Internet as users confront spam, viruses, phishing, urban legends, and questionable content. Trust on the Internet can be characterized as horizontal, in that all users are equal and there is no way to enforce norms of behavior, and local, i.e., based on personal knowledge of what sites are trustworthy. Scholarly trust, on the other hand, is highly vertical, in that there are consequences for violating that trust, such as being denied tenure or being expelled from a professional society. Scholarly trust is also global, which means that it is distributed via proxy, such as what institution a researcher graduated from, where he/she teaches, and in what journals he/she is published. Given that Internet trust and scholarly trust are such polar opposites, how do they meet in the middle?

Within the context of the deprecation of publisher and librarian intermediaries and the problem of trust on the Internet, researchers as readers face a problem of their own. Researchers are spending more time reading, yet they are reading less of each text. This problem is accelerating as readers encounter blogs, wikis, and Twitter feeds in addition to traditional scholarly content. After posing the question of how readers and researchers can differentiate scholarly, credible content from the growing volume of information produced, Bilder introduced the concept of “paratext.”

Paratext is anything outside of a text that sets expectations about that text. Examples include illustrations, cover design, or publisher brand. When we interact with printed information, we use deeply ingrained heuristics such as where we found the text – bargain book store or library, glossy magazine or scholarly journal – or if a book or article has footnotes. Many of these heuristics are not applicable in the online environment, yet in the context of too much information, heuristics are essential in filtering content and determining what is worth reading and what is not.

Publishers have known about the importance of paratext for a long time. In the early days of printing, anyone could pay a printer to print their text. There was a great deal being printed with minimal quality control or editing of content. Early publishers emerged in order to guarantee quality in the publishing process. Paratext in the form of publisher logos and journal brands became a proxy for trustworthy content.

To signify quality scholarly content on the Internet, Bilder proposed using paratext in the form of a “meta-brand.” Meta-brands are industry-sponsored marks which differentiate credible players in an industry from others, for example “USDA Organic,” “Fair Trade Certified,” and “Dolphin-Safe.” Meta-brands serve to certify the processes by which goods and services are produced.

As an example of a meta-brand certifying scholarly content, Bilder introduced CrossRef’s “CrossMark” logo. As envisioned, a CrossMark logo on an online scholarly text would indicate that it was the version of record. By clicking on the CrossMark logo, the reader could access additional information about the text, such as the fact that it was peer-reviewed, edited, and checked for plagiarism. CrossMark information could also include funding sources, any errata, or even if an article or an article cited had been retracted. If publishers and librarians can create meta-brands such as CrossMark, we can reassert our roles in guaranteeing the
trustworthiness of scholarly information, whether or not researchers access the material through a library gateway or publisher website. In addition, readers will be able to quickly and easily identify trustworthy scholarly content within the overwhelming volume of information available to them.

**Strategy Sessions**

**Collaborative Tagging: Traditional Cataloging Meets the Wisdom of Crowds**

*Scott R. McFadden, Ball State University; Jenna Venker Weidenbenner, The Career Center*

Reported by Marie Peterson

Scott McFadden (his co-presenter was unable to attend due to illness) began this presentation with an overview of bookmarks and tags and their role in finding information online. As sites began to proliferate on the Internet, and the number of users began growing as well, users began to develop methods for keeping track of websites they might want to find again. How could this vast, growing universe of information be “cataloged”? Was there any way to organize and provide user access to so much information?

One answer, albeit a limited one, involved creating bookmarks which were stored in a restricted way in folders on the hard drive. A serious disadvantage to this method was that these bookmarks were only available on the individual computer used at the time they were created.

Users eventually figured out that tagging the information, the digital object itself, or the site itself, would provide a way of searching for and finding that information again. Tags are metadata elements attached to an object that describe an aspect or attribute of it. They can be created from anywhere and applied to anything digital. McFadden added that electronic tagging has gone beyond digital, and is now being applied to physical objects.

Tagging is an ultimately social endeavor; many if not most users are tagging resources not only to organize their own information, but especially in order to share resources with others.

Tagging is ubiquitous now. It is used on social bookmarking sites such as Delicious; on blogs, personal, news media, political and professional; on commercial sites, such as Amazon; photo websites, such as Flickr; and on collaborative book cataloging sites such as LibraryThing and goodreads. These are simply the tip of the iceberg for tagging applications.

The advantages of tagging include their ease of use. Natural language is used rather than a prescribed thesaurus of accepted terms; there is no intimidation involved. However, because of its ubiquitous use, there is no authority control, no controlled vocabulary, and no hierarchical structure. Similar terms may end up causing confusion for the user.

Should collaborative tagging replace a structured cataloging schema? There is, after all, more flexibility of vocabulary in folksonomies than in Library of Congress Subject Headings. Rather than choosing one or the other, using social tagging alongside traditional cataloging provides an effective way to enhance research.

McFadden discussed four library systems, one public, and three academic, and their use of tagging while continuing with traditional cataloging practices.

Ball State University includes user-created, librarian-monitored tags in their online subject guides. Tags are seen at the top of the subject guide page, and as a tag cloud at the side. Users may supply tags, but only editors may add them to the page. This results in a somewhat controlled vocabulary rather than a completely user-created folksonomy.

The University of Michigan’s catalog is enhanced by tags created as a result of patrons’ saving and organizing information for their projects. Their saved interactions are mined for tags, per Ken Varnum, web systems
manager at Michigan, which appear as tag clouds on each relevant catalog entry. Similarly, the University of Pennsylvania’s “Penn Tags” result from users’ organizing information for projects. Patrons can also add tags to any catalog record by a click of a button.

The Ann Arbor District Library has a very flexible approach to tagging. The home page shows the top ten tags in an interactive display. Clicking on any one, e.g., “anime,” will take one to a list of titles having that tag. Patrons may add tags to catalog entries, see what other users value by way of the top ten list, and increase findability of information for everyone.

The Q&A was excellent at this presentation. Among the issues discussed by the audience were how to address administrators who think catalogers can be eliminated because of social applications; the need for the Library of Congress and others to enable their controlled vocabularies to “talk” to user-provided tags, crosswalks between thesauri/ontologies; and how to provide editing of tags without it becoming censorship.

Open Source ERM: a Collaborative Implementation

Francis Dodd, Simon Fraser University; James Murphy, University of Prince Edward Island; Don Taylor, Simon Fraser University

Reported by Susan Wishnetsky

The latest component of the open source reSearcher software project, an electronic resource management (ERM) system designed to meet the needs of various libraries, was introduced by three users of the system. The ERM system can be adopted as a stand-alone product, but it builds upon the CUFTS open source online serials management system. CUFTS has been in development since 1992 and already includes a link resolver, a knowledge base, and an e-journal database for information at the title and library level.

Don Taylor, the head of Document Delivery Services at Simon Fraser University Library, began the presentation with an overview and a bit of history on the other three parts of the reSearcher suite. The CUFTS knowledge base, which contains over 475 full-text products and collections, can be freely used by anyone, housed onsite or with SFU as a remote host. Its information is obtained from publishers or vendors, but the data are often incomplete and must be “massaged” manually. Maintenance and additional data entry is done collaboratively by a number of its users. This arrangement began informally, when libraries using the knowledge base wanted resources to appear in the knowledge base faster than SFU staff could add them. This labor-sharing arrangement benefits all users by providing a more up-to-date and complete knowledge base, and also benefits the participating libraries by giving them a better understanding of the system. The e-journals database, with basic MARC records derived from the knowledge base, provides a place for local holdings for individual journal titles, including electronic, print, or other formats. The link resolver, Godot, named by programmers working very late one night, uses open URLs to provide article-level linking, or defaults to the home page of the journal or aggregator database, if information for direct linking is missing. Godot also displays catalog holdings and works with interlibrary loan software and major integrated library systems.

The development of the ERM system was driven by the need for centralized licensing data among consortia members. The libraries from two consortia, the British Columbia Electronic Library Network (BC ELN) and the Council of Prairie and Pacific University Libraries (COPPUL) participated in its design. Its initial design was drawn from the Digital Library Federation Electronic Resources Management Initiative, although some fields were modified to satisfy different libraries’ needs.

Taylor displayed the three record types within the ERM system: the main resource record; the provider record; and the license record. He showed the tabbed display and fields within the main record. License and other information within the ERM system can be viewed by all staff, such as ILL staff. Taylor described features that
had proven too difficult to incorporate, such as restricting searches of resources to those containing images, and other features still in development, such as the ability to collect vendor-supplied usage statistics, in addition to website click-through statistics. Taylor discussed how the ERM has affected the workflow and division of responsibilities at SFU, moving e-journal management from the Collections Department into the Technical Services Department.

James Murphy, the library technician for e-journals maintenance from Robertson Library at the University of Prince Edward Island (UPEI), described how his library implemented CUFTS and worked with SFU to adapt the ERM system to their needs. UPEI, a longtime user of open source software such as Moodle and Drupal, uses an open source product, Evergreen, as its integrated library system. However, Evergreen has no serials module yet, so UPEI began working with SFU to adapt CUFTS to serve as a print serials check-in and acquisitions system. Murphy found that SFU developers responded quickly, creating additional fields to meet UPEI’s needs. Acquisitions information, which had been kept on spreadsheets, and copies of contracts, are now being copied and pasted into the CUFTS ERM system, and a free text field is used for check-in. Now patrons can view the locations and holdings of print and online serials.

Ensuring Perpetual Access to Online Subscriptions

Moderator: Judy Luther, Informed Strategies
Panelists: Ken DiFiore, Portico; Selden Lamoureux, North Carolina State University; Victoria Reich, Stanford University: CLOCKSS, LOCKSS; Heather Ruland Staines, Springer; Kim Steinle, Duke University Press

Reported by Janet Arcand

After brief statements from the panelists indicating their perspective on the topic of perpetual access, most of the time was devoted to a discussion of audience concerns.

Publishers are creating new pricing models for back issue access. They have new expenses associated with retrodigital work on backfiles and want to charge for it. There will be additional costs since systems need to change or upgrade as technology changes. Publishers have found that users want things which they did not foresee and they need to react to these needs. Some publishers are exploring ways to provide a paid service to individual users who want to use data in new ways beyond the current access platform, in enriched software.

Libraries are switching print subscriptions to online, partly to save physical space, and want guaranteed online access. Librarians need to be aware of the terms of their subscriptions before they cancel them, in case the cancellations would cause them to lose some or all content. Some libraries plan to store formerly subscribed content in a digital stack on campus, like LOCKSS, or in an institutional repository, but there may be legal issues to consider. Library administrations are not as comfortable with LOCKSS as they are with Portico, because the individual libraries have more responsibility within the LOCKSS model. There may be a role for regional repositories to handle the storage of back content. Portico is trying to partner with publishers who want to deposit content at Portico so that the publisher site is not the only place to find it.

A former expectation was that switching to online would be less costly for the library. The publisher point of view is that libraries already save on costs since they no longer need to bind or shelve. Online content has enhanced features for library users, and the material is inherently more accessible. Libraries may not save money but patrons are using the material more. Perpetual access is an “asset” that helps some libraries get funding to acquire resources. Newer institutions tend to be very online access-reliant since they don’t have the same back-content print collections as older institutions.

Libraries were wholly responsible for archival access when paid content was print-based, but now expect the
publishers to take responsibility for archival access in the digital age.

Guaranteed access to open access content is a concern, since some OA publishers are attracting commercial publishers and are being eyed for acquisition.

There are also concerns about titles that transfer to new publishers which do not honor the terms which the old publisher had allowed or negotiated.

**What Do You Get When You Cross a License with XML? A: ONIX-PL**

*Todd Carpenter, NISO*

Reported by Selina Lin

**Mr. Carpenter**, the managing director of NISO (National Information Standards Organization) began his presentation with an overview of NISO's organization, its membership composition and scope. He then gave the definitions of the word “license” as verb and noun. In today's world, licenses are everywhere – in fine print in software products, in Internet e-commerce – but people rarely read them due to their complexities. As libraries’ acquisitions transitioned from print to electronic resources in the late 1990s, libraries and publishers invested tremendous amount of time and energy in negotiating licenses. Managing rapidly growing electronic collections became a daunting challenge. It is against this backdrop that the impetus for the need to standardize licensing procedures was born.

The timeline of ONIX-PL’s development dates back to November 22, 2000, when Karen Calhoun, formerly at Cornell University Libraries, posted a message to the ALCTS technical services listserv asking, “How are people managing bibliographic, licensing, evaluation, troubleshooting, etc., data about licensed networked resources?” The ensuing conversations led the Digital Libraries Federation (DLF) to conduct a survey in January 2001, which identified digital collection development as the single greatest challenge by the respondents. With DLF’s support, Timothy D. Jewell of the University of Washington and Adam Chandler of the Cornell University Libraries conducted this research and published a report in July 2001. Based on their work, DLF launched the Electronic Resources Management Initiative (ERMI) in 2002, issued an initial report in August 2004 and a final report, ERMI 2, in December 2008. ERMI’s stated goal is to “… develop common specifications and tools for managing the license agreements, related administrative information, and internal processes associated with collections of licensed electronic resources.”

The 2004 DLF-ERMI report, [http://www.diglib.org/pubs/dlf102/](http://www.diglib.org/pubs/dlf102/), includes two flowchart diagrams of workflows for print and electronic resources in acquisitions and ongoing maintenance. They highlight the similarities and differences between the two processes. The substantial differences in the procedure for electronic resources lie in the fact that they routinely require a licensing process, and may pose technical difficulties for implementation.

The ERMI reports recommended the following areas for exploration and development:

- Management systems, now ERMs
- Management of usage data, SUSHI
- Define license terminology, ERMI data dictionary
- Training community on how to encode licenses
- Exchange of items, LEWG, Joint License Expression Work Group, ONIX-PL
- Cost-per-use calculation data, CORE

The benefits of encoding licenses, storing and sharing them in an electronic format include increased awareness of the terms, greater ease in sharing terms with users, improved compliance with terms and clarity about what is in a license, and better, faster and easier negotiation based on clearer understandings.

The initial ERMI project led to the formation of the License Expression Working Group (LEWG) consisting of
representatives from NISO, the European Book Sector Electronic Data Interchange Group (EDItEUR), DLF, and the Publishers Licensing Society (PLS). The group worked to develop a single standard for the exchange of license information between publishers and libraries. This group mapped ERMI license terms, upon which many ERM systems are structured, to the existing ONIX-PL. The LEWG was officially disbanded in August 2008 and its work subsumed by the joint NISO/EDItEUR ONIX-PL Working Group.

So, what is ONIX-PL? ONIX is an acronym for Online Information eXchange, and is part of a family of XML schemas representing publishing industry product information; PL stands for Publications Licenses. In a nutshell, ONIX-PL is “a structure for making the content of a license machine-readable” in XML format, a tool to make license terms and conditions more accessible, and is extensible for additional terms from a dictionary in the future.

On the other hand, ONIX-PL is not a rights expression language. It does not prevent or enable access to digital content. It expresses content of a license, but is not a license. Complete translation of license into ONIX-PL is not required. Also, the information encoded into an ONIX-PL record is open to interpretation.

OPLE (ONIX-PL Editor) version 1.0, was developed by EDItEUR as an open source software package to support the creation and maintenance of ONIX-PL expressions. It is a web-based tool and works with all the major browsers. Current users of ONIX-PL include UK’s Joint Information Systems Committee (JISC), the Publishers Licensing Society, Nature magazine, Springer, Elsevier, Oxford University Press, and the Southern California Electronic Library Consortium (SCELC). The goal is to have at least five major publisher implementations by the end of 2009.

Two potential future directions for ONIX-PL are a possible JISC-funded initiative to create a repository for licenses and a survey of community to assess the relative priority library system customers place on license expression.

Finally, a few thoughts on licensing expression:

- Communicating license permissions and prohibitions to staff and users is difficult.
- License expression is not a simple process; cost-benefit analysis is needed
- Many issues need to be considered: desire for ambiguity versus clarity; the level of details that an organization needs; ONIX-PL is not an enforcement mechanism; issues impacting negotiation.

After a lively discussion, Mr. Carpenter concluded his presentation with an appropriate quote by Charles Mingus: “Making the simple complicated is commonplace; making the complicated simple, awesomely simple, that’s creativity.”

Playing the Field
Pay-Per-View E-journals and E-books

Lindsey Schell, University of Texas; Katy Ginanni, Trinity University; Benjamin Heet, University of Notre Dame

Reported by Janet Arcand

The presentation began with a description of the desired concept for pay-per-view. In it, IP-registered users can access online content from a publisher, payable by the library upon download, through an invoice or a deposit account. The library can choose to mediate it. Users should have access to many more articles than were available through traditional library subscriptions. The cost per use would be dramatically cheaper for the library’s seldom-used subscriptions, and there would be no storage costs. It would serve as a supplement to the library’s ILL service and should be quicker than traditional ILL. Usage and cost statistics would enable the PPV deal to be evaluated.

Trinity University had a successful pilot project to access Elsevier journals, gaining access to 2500 titles and no longer needing to purchase 77 print titles. Faculty response was generally favorable but library staff noticed that when faculty could see the cost of the articles, they sometimes chose not to purchase them.
76% of articles retrieved were from journals for which they had no previous subscriptions. Students have to get access to articles though the mediation of librarians or faculty.

The University of Notre Dame wanted to replace their access to 800 Springer subscriptions. They started with an unsuccessful PPV experience with Ebsco EJS, which dropped the option before they could acquire it. Notre Dame then chose a pilot project with Infotrieve. The article discovery was done through A&I databases instead of through a browse mechanism and this decreased usage. Registration to obtain articles was cumbersome and the shopping cart appearance confused users. 75% of the library’s users gave up or had incomplete transactions. Notre Dame later canceled this project and chose to resubscribe to their Springer package.

The University of Texas had an unsuccessful project with Ingenta. There were fewer journal titles available than had been advertised. The shopping cart appearance was never fixed and users had to get through five clickthroughs to get to the article. The statistics module showed multiple failed deliveries for which the library was charged. The product did not block users from subscribed content, the article cost was higher than advertised, and support queries were not answered promptly.

The University of Texas had a successful project for a collection of 300,000 e-books with EBL. The deal was customized to allow three rental views of the book for 5 to 10% of the list price. Upon the fourth “view” request, a purchase of the e-book was generated for the full list price. EBL provided brief MARC records for rentals, and full MARC records for purchased books. The estimated cost per use was $4 (as compared to an estimated $28 cost per use for print titles).

Usage of Open Access Journals: Findings from Top 11 Science and Medical Journals

Jayati Chaudhuri, Science Reference Librarian, University of Northern Colorado; Mariyam Thohira, Electronic Serials Librarian, University of Colorado at Colorado Springs

Reported by Barbara M. Pope

Chaudhuri and Thohira studied the use of open access journals based on citations from science and medical journals from 2004, 2006, and 2008 to determine whether usage is increasing. They hypothesized that there would be an increase.

Chaudhuri began with an overview of open access and the different types of open access journals, including true open access and hybrid open access journals. In addition, she mentioned that green open access journal articles are articles published in traditional journals that are also placed in an open access repository. Chaudhuri noted that there are many open access repositories and it is impossible to estimate the prevalence of green open access articles, because they are difficult to find. She pointed out several open access mandates, such as the Harvard University Open Access Mandate, which was adopted by the Harvard faculty, and the NIH Open Access Mandate for NIH-funded research.

Thohira defined a use as a citation, and they based their findings on citations in 11 key medical and scientific journals from randomly chosen issues published in 2004, 2006, and 2008. Thohira added that they had four questions:

1. What subjects showed an increase in the use of open access and hybrid open access journals?
2. How does open and hybrid open access use vary among the journals analyzed?
3. What is the overall pattern of open access and hybrid open access journal use?
4. How does the use of open access and hybrid open access journals compare with each other?
After collecting and analyzing their data, Thohira noted they found that biology has the highest use of open access and hybrid open access journals, followed by medicine and mathematics. All three disciplines showed an increase between 2004 and 2008. Physics and chemistry journals had the least use and had no patterns. Among specific journals, Science had the highest use, followed by PNAS, JAMA, and The New England Journal of Medicine. Both Science and Nature showed a clear increase, while other titles increased some.

The speakers concluded that the use of open access journals has increased. However, use was higher for hybrid open access journals than true open access journals. While some disciplines had low use, Chaudhuri and Thohira noted that researchers in science and medicine are utilizing them. When the speakers were asked what this means for libraries, Ms. Chaudhuri responded that she had not realized the amount her library was spending on journals which are available as hybrid open access journals with short embargoes. As a result of the data, she noted she was able to make strategic collection development decisions for her library.

**ERMS Integration Strategies: Opportunity, Challenge or Promise?**

*Karl Maria Fettig, Bowdoin College; Christine Stamison, Swets; Rebecca Kemp, University of North Carolina at Wilmington; Bob McQuillan, Innovative Interfaces, Moderator*

 Reported by Marie Peterson

Moderator Bob McQuillan opened the presentation with a statement on opportunities and challenges associated with integrating electronic and print resources. The ratio of electronic to print is changing rapidly, leaving limited staff very little time to adapt, reassess and reorganize to effectively deal with the change. McQuillan presented four topics in turn, and asked each of the panelists to comment. The four areas of discussion were budgets, staff workflow, usage statistics harvesting, and the future of the ERM.

**Budgets**

*Karl Maria Fettig* gave Bowdoin’s breakdown of electronic versus print budgets as 60% to 40%. Space, staffing and future contract issues are related concerns. Their use of library space is being questioned by senior administration. Staffing losses are an issue. PromptCat with shelf-ready service has helped reduce some staff time, but they are also expecting contract services to be cut in the near future. Serials and standing orders will be reviewed this year, with a keener eye to reductions, including whether they want a print title at all if the electronic is available.

*Rebecca Kemp* gave UNCW’s 2008/09 budget as almost $1,500,000 for electronic resources versus $500,000 for print. E-resources are labor intensive. Staff deal with licensing, package renewals, access set-up, and troubleshooting. Statistics seem to point to heavy usage, but they question whether it justifies their overall expenditure.

*Christine Stamison* said Swets’s 2009 electronic or e-component subscriptions were 67% of their total, up 10% from 2008. More libraries are going e-only, citing space issues. Libraries are going directly to publishers for the “big deal,” while enlisting vendors for payment and subscription details. Small agents are going out of business because they cannot handle and cannot afford to implement new technologies needed for e-resources. Remaining agents are increasingly integrating licensing management into their systems.

**Staff Workflow**

Each of the panelists discussed staff training and reorganization needs in order to deal with fast growing electronic resources. Some traditionally print-oriented staff have been reluctant to work with e-resources, but overall, the necessary flexibility has been there. Training is very important for the successful use of staff resources.
Usage Statistics Harvesting

Kemp said agents also need to show a return on investment (ROI). Swets uses an electronic auditing system, SUSHI, for downloading statistics. Fettig recounted Bowdoin’s evolving attempts over the past three years to harvest usage statistics. They recently developed Database Stats, an ERM/homegrown hybrid application, as it is important for them to count database and federated search usage.

Future Role of the ERM

Bowdoin will be implementing AquaBrowser with its ERM component. Innovative Interfaces and Serials Solutions have been good for them, but they need to integrate the functionality of various systems. UNCW is also working on a new system, loading packages one at a time, updating records, and hoping to have everything set to function together. They’ll be using WebBridge as their link resolver. Swets is going to ONIX-PL to help with licensing information, and CORE for uploading acquisitions data, along with SUSHI for usage data. Systems and components are evolving quickly; the question is whether this keeps pace with institutions’ needs.

Following a lively Q&A session, it was apparent that dealing with electronic resources is an ongoing challenge for everyone — every institution, every agent, and all staff — and no one has solved all the issues.

Piloting an E-Journals Preservation Registry Service, PEPRS

Fred Guy, Project Manager, EDINA; Peter Burnhill, Director, EDINA

Reported by Yumin Jiang

Fred Guy and Peter Burnhill, both of EDINA, the UK national academic data center based at the University of Edinburgh, presented a strategy session on a two-year project, Piloting an E-journals Preservation Registry Service, PEPRS. The aim of the project is to investigate and pilot an online facility that enables librarians and policymakers to ascertain the archival provision for e-journals.

Burnhill began the program by introducing the organizations involved in the effort. There are two partners: EDINA, based in the University of Edinburgh, Scotland; and the ISSN International Centre (ISSN IC) located in Paris, France. The funding body is the UK Joint Information Systems Committee (JISC). Guy described the background of the project. Most science journals and arts and humanities journals are now online. Librarians and researchers are concerned about long-term accessibility and preservation of those e-journals. Many organizations are addressing this issue in various fashions. However, sometimes it is not apparent who is doing what, or if a particular journal is covered by any archiving initiatives. JISC commissioned a scoping study in 2007 and one of the recommendations was that an e-journal archiving registry should be built.

PEPRS officially started in August 2008. It focuses on e-serail with an ISSN, and on journal title-level information. Five preservation agencies are in the pilot, including two third-party organizations, CLOCKSS and Portico; two national libraries, the British Library and Koninklijke Bibliotheek; and one library cooperative, UK LOCKSS Alliance. The registry contains two kinds of metadata: metadata on e-journals, such as title, ISSN, and extent issued online, provided by the ISSN IC; and metadata on preservation actions, such as access policy and extent preserved, provided by the preservation agencies. The service piece will be developed by examining registry user requirements.

The presenters then shared some thoughts and actions on issues that came up. They chose to use E-Journals Register sourced from ISSN Register, and encouraged the audience to push for ISSNs to be assigned to their favorite e-journals. Questions remain on what to do with those print serials that are digitized retrospectively. For current and reliable information about policies and coverage by preservation agencies, the project hopes to rely on network interoperability to
search or harvest quality data. How to collect and display holdings information is another complicated issue. The presenters commented that holdings information is difficult to handle, and maybe there is a role for DOI or ONIX for Serials. Some other questions include whether this project is scalable if the scope becomes international, and whether PEPRS needs to adapt if the attention is turned to post-cancellation access rather than preservation.

A demonstrator site is expected to be available in fall/winter 2009. An assessment of the project is scheduled in February 2010. The project website is at: http://edina.ac.uk/projects/peprs/.

Informing Licensing Stakeholders: Towards a More Effective Negotiation

Lisa Sibert, University of California, Irvine; Micheline Westfall, University of Tennessee, Knoxville; Selden Lamoureux, North Carolina State University; Clint Chamberlain, University of Texas; Vida Damijonaitis, American Medical Association; Brett Rubinstein, Springer

Reported by Alita Pierson

This strategy session offered a lively discussion concerning licensing issues. A few basic thoughts were presented at the beginning of the session. Among these were that all parties agreed that the license negotiation process is improving. Larger publishers were acknowledged to be friendlier to negotiation, while at the same time, their concerns were aired. These were primarily copyright protection, resale, and the potential for abusive downloading of material. “No one size fits all,” said one vendor rep, and the consensus is that yes, license negotiation can take a lot of time.

A key theme of the discussion was the concept of playing hardball. The rather pointed question, “Do you guys [i.e., publishers] learn from the process [and how] to do it better in the future?” was answered in the affirmative. It was pointed out that during the negotiating process, if “they” get explicit, “you get explicit,” meaning that for librarians, there should be no question of going to the mat for the needs of your institution. The email listserv LIBREF-L was mentioned as a good source for finding specific language that meets the needs of whatever you are trying to negotiate. As a subscriber, I can attest that if you send a query requesting input on “Clause ABC,” you are sure to receive an outpouring of helpful responses.

On the topic of breaches: licenses are not helpful if there is a breach. The license will not magically solve the problem. However, it is an excellent place to document the proper procedure for handling a breach.

On the subject of perpetual access: this is something that everybody wants. However, a great point was made about what we in the library world are really talking about when we say “perpetual access.” In the library world “perpetual access in a format that is comparable to the current access or in the care of a trusted third party, LOCKSS, CLOCKSS, or Portico” is needed. In other words, nobody wants to be handed a black box with all the data to which you have subscribed; technically, that could be viewed as providing perpetual access, but it would be useless.

NELLCO’s Universal Search Solution (USS)

Roberta F. Woods, Reference and Electronic Resources Librarian and Assistant Professor; Franklin Pierce Law Center

Reported by Barbara M. Pope

A quote by Roy Tennant on the NELLCO (New England Law Library Consortium) website says, “Only librarians like to search; everyone else likes to find.” This is a very apt point on the subject of Ms. Wood’s presentation. She began the session by describing the problem consortium members had with resources not being utilized due to low visibility or lack of ease of use. The libraries wanted to optimize existing resources and make them easier to use by being able to search everything at once.
Woods identified three project goals: resource discovery; having a single search box; and a single search set. The libraries wanted patrons to be able to search all resources from a single point. They wanted the single search set of results to include items from the online catalog, databases, vetted free websites, and locally developed content. She added that consortium members wanted the system to be Google-like and have scoped searching.

Woods noted that the path to the Universal Search Solution began with looking at federated search products. The consortium was not satisfied with them because they did not have any legal databases. Woods added that search results were unsatisfactory and vendors were not forthcoming with how relevancy ranking works. For example, while the libraries wanted to make the online catalog more visible, catalog results were buried. Search statistics were skewed. Woods explained that the slow connection and loading times as well as increased traffic caused database servers to crash.

She added that the consortium also investigated using a Google search appliance. When they tested it, online catalog results were again buried. However, it was an improvement because the connection and loading times were fast.

Google Scholar contacted Woods about using Google Scholar. However, doing so would have meant the libraries would be searching everything, not just their resources. Ms. Woods noted that NELLCO turned them down.

After unsuccessfully examining these options, NELLCO applied for an Institute of Museum and Library Services grant to have a product developed. Once the grant was approved, they hired Index Data to create the tool, which they dubbed Universal Search Solution. The product is up and running and does index searches instead of real-time searches, making it fast. It includes faceted searching by law school, author, vetted free websites, and paid databases. It de-dupes results, displays them as a single set, and notes the owning library. Phrase searching is the default, and while advanced searching is available, Woods notes it is likely not used by students.

Woods emphasized that while other products that the consortium looked at were unsatisfactory for various reasons, Universal Search Solution has fulfilled their needs by being simple and easy to use and increasing accessibility and visibility of resources. She added that Universal Search Solution is still in beta, but once completed, it will be an open source product available for any library. Ms. Woods invited libraries to try out the tool. For additional information and to search, go to http://nellco.org/index.cfm?pageld=505&parentID=504.

Chicago Collaborative

Patricia Thibodeau, Duke University Medical Center Library and Archives; John Tagler, Association of American Publishers/Professional and Scholarly Publishing

Reported by Selina Lin

As stated in its statement of purpose, the “Chicago Collaborative was created from a conviction that we are at a pivotal moment in the history of scholarly communication.”

The presenters began by giving the background of the Chicago Collaborative, followed by its challenges, strategies, and expected outcomes.

Recognizing that the stakeholders in scientific communication share the same ultimate goals – sharing and disseminating information and ensuring the users receive relevant, reliable and appropriate information – in October 2007 the Association of Academic Health Sciences Librarians’ (AAHSL) president and board of directors established a task force. The task force was given the charge to “Establish an AAHSL Board strategy to promote direct ongoing dialog and examination of issues of joint concerns and importance to AAHSL and STM publishers, and to develop and promote a presence for AAHSL among STM publishers.” In April
2008, the task force invited the leadership of various publishing and editorial organizations to a planning meeting in May 2008, which was held following the annual Medical Library Association meeting in Chicago. The major consensus-driven recommendation coming from this meeting was to establish a working group to address the challenges of scientific communication. The working group chose the name Chicago Collaborative to reflect the meeting place and the spirit of the meeting.

Several challenges were identified:

- Preservation/archiving of journals
- Effective STM authorship
- Peer review/quality assurance
- Dynamic content containers
- Branding STM contents
- Future of the journals
- Mitigation of newer technology

The Chicago Collaborative strategies include:

- Focus on association membership, rather than individual librarians, publishers or editors
- Equal partnership in dialogs among members on broad higher-level scholarly communication issues and challenges
- Share ideas and interests of representative organizations
- Consensus-driven statements developed by members
- Educate CC’s constituency (academic health care personnel: administrators, faculty, researchers, clinicians, students) regarding broader scientific communication topics (e.g., effective authorship, editorship, and the role of journals)
- Develop a clearinghouse for educational materials regarding scholarly communication process
- Conduct educational sessions with focus on factors affecting scholarly communication

The expected outcomes of the Chicago Collaborative are:

- Research leading to position papers or statements on scholarly scientific communication issues
- Dialogs with experts and broader constituents
- Sustainable mechanisms for ongoing conversations and actions among members
- Trusted venue to discuss broad scholarly communication challenges and opportunities among members

The founding membership of the Chicago Collaborative consists of associations of librarians, publishers and editors in the entire scholarly communication community, with emphasis on scientific, technical and medical fields. They are:

- Association of Academic Health Sciences Libraries
- Association of American Medical Colleges, Council of Academic Societies
- Association of American Publishers, Professional and Scholarly Publishing Division
- Association of Learned and Professional Society Publishers
- Federation of American Societies for Experimental Biology/DC Principles
- International Association of Science, Technical & Medical Publishers
- International Committee of Medical Journal Editors
- Society for Scholarly Publishing

A lively discussion followed the presentation. Several educational initiatives were mentioned:

- Informational sessions at library conferences (at national and chapter levels, e.g., NASIG, MLA, ALA and SLA)
- Educating authors (i.e., copyright and author rights issues)
- Libraries 101 (a curriculum to be offered to publishers and publishing organizations)
- Bio-medical publishing 101 (a curriculum to be offered to libraries and library organizations)
In conclusion, the presenters emphasized the challenges and the importance of collaboration among all stakeholders for the collaborative to succeed.

**Not Just Drifting: Checking Online Serial Issue Availability**

*Kitti Canepi and Andrea Imre, Southern Illinois University, Carbondale*

Reported by Amy Carlson

*Kitti Canepi* and *Andrea Imre’s* presentation concentrated on current and future processes to determine electronic resources’ issue availability. Beginning with their current environment at Southern Illinois University Carbondale, Canepi and Imre conducted a survey to determine the systematic check-in of electronic serial issues on a wider scale. While considering the larger issues related to electronic resource access, Canepi and Imre discussed the future possibilities with new technologies.

Currently, Southern Illinois University Carbondale utilizes a process based on print serials to verify receipt of electronic serials. Although the resources are in an online format, their process lacks automation and standardization. In 2009, they wanted to know how others managed the workload and what other possibilities existed, especially automated or any standardized protocols to share information, such as ONIX for Serials. Specifically, they wanted to find out how others systematically tracked serial access: what are the trigger mechanisms; how do they verify access; and who manages the checking and who solves the problems?

After a literature search, they composed a survey and distributed the instrument through discussion lists. After analyzing the results they found a picture of current practices. They received 237 responses. They found a correlation between budget size and online-only journal spending; namely, the greater the budget the more likely the library will subscribe to the online version only. 51% of respondents are systematically checking access. Half of those check access annually. 57% use some form of trigger to check access, such as the ILS prediction pattern, or other methods such as spreadsheets or calendars. How they verify access ranges from opening an article (79%), to checking the journal website. Imre delved into the problems faced with checking publisher’s administration sites, as the fact that each publisher provides different bits of information in a variety of formats. The lack of standardization adds to the complexity of the process and the time required verifying access. 39% responded that a faculty/librarian conducts the checking, with support staff checking for 32%. However, for 61% of the respondents, the faculty/librarian resolves the problems. When asked to assess their process, half of those responding suggested that the process worked fairly well but could be improved. 83% had either slight or no familiarity with ONIX for Serials, while 45% were very or fairly interested in it.

What if librarians could simply receive issue availability information rather than checking access? Canepi asked the audience to imagine receiving an automatic message when a new issue becomes available. The local system would collect the message and the specific URL for the issue. The local system could also check the URL for any problems and send an auto-claim to the provider as needed. What if these automatic messages could help maintain the link resolver, provide catalog updates, or send the table of contents to patrons? In 1999 book publishers and vendors began to use ONIX (Online Information eXchange), an XML schema. In 2002, EDItEUR wrote a white paper looking at the possibilities for serials, including a number of different elements. These were: Serials Products and Subscriptions (SPS), for communicating subscription information; Serials Online Holdings (SOH) for transmission of holdings information; and Serials Release Notification, (SRN), used to communicate availability and potentially additional content such as reviews or abstracts. Currently these schemas are in pilot versions only.

Both Canepi and Imre recommended participation of librarians as customers to urge vendors and publishers...
to work with these new protocols. They suggested that librarians do not want email or another list to verify, but that an automated and standardized solution that is consistent and that could be monitored by different personnel is needed. They hope to see standardization and better communication between librarians, publishers, Electronic Resource Management Systems and link resolvers in the future.

Questions from the audience ranged from specifics on checking access to working with publishers to standardize information.

**Tactics Sessions**

**We Deliver: Overcoming Microform Collection Access Issues**

*William H. Weare, Jr., Access Services Librarian, Valparaiso University*

Reported by Michael A. Kardos

A mind, 600,000 pieces of government microfiche, and 325,000 other microforms are terrible things to waste. In this session, Weare described a library pilot project to deliver microform content electronically. He started by giving a snapshot of Valparaiso University, the Christopher Center for Library and Information Resources, and the library’s microform collection. There are over 900,000 microform units, two microform readers linked to two computers with image scanning software, and three older generation microform readers in the collection. Unfortunately, Weare noted, the collection was rarely used by patrons.

The original microform collection operated under a self-service model which required the patrons to use the microform readers and image scanning software themselves. The microform collection, although located next to the circulation desk so patron assistance was available, was “not a hub of activity,” according to Weare. The equipment and software were adequate but intimidating for the average patron. The image scanning software used was ImageOne of Tampa, Florida, for Canon microform readers. For several reasons, using the software was difficult and confusing for patrons. For example, the software was designed for a kiosk but sat on a computer, patrons could not save the images to a CD-ROM or portable drive, documents could not be delivered electronically, and, the software occasionally crashed.

Weare’s solution was to move from a self-service model to a service-desk model. Access Services, in cooperation with Interlibrary Loan (ILL), initiated a pilot project to electronically deliver articles and documents from the microform collection. The pilot project, available only to undergraduate students, enabled students to request material from the microform collection using the same process as they would for any ILL request. ILL staff locates the microform and gives it to Circulation student employees to scan. The scanned documents are returned to ILL, who delivers the documents electronically to the student. This free library service attempts to process requests within one business day. The library is also currently conducting pilot training sessions with undergraduate students to use the microform collection, readers, and software.

The pilot project has been successful despite the library having done virtually no marketing for the project. To improve the process the library wants to upgrade the scanning software and equipment, formalize policy, assign specific staff duties, and improve coordination with ILL. For more information on Valparaiso’s document delivery pilot project, visit http://www.valpo.edu/library/ill/docdelivery2.htm.

**Marketing the Library in a Digital World**

*Kerry Cole, Portland Press, Ltd. /The Biochemical Society; Tonia Graves, Old Dominion University*

Reported by Jane Bethel

Kerry Cole from the publishing industry engaged the audience describing basic tactical marketing tools as well as planning and measuring for successful marketing
strategies. Draw on your resources, Kelly advised: your talented staff members, student organization groups, and, perhaps, an under-utilized circulation student staff. Tonia Graves enlightened us with past and present marketing promotional events that occurred at her academic library. Through details and statistics, Tonia described the momentum and rewarding results.

Formal marketing plans are not the norm at not-for-profit institutions. Marketing has become more important now because users are not physically occupying space in the library. Kerry stated that libraries have more in common with marketing than you might imagine. “Marketing is communication, delivery of value, and management of customer relations.” Marketers and librarians have big ears, are national networkers, and problem solvers. Marketing needs a plan. It is not an emergency measure, and is only complete when you decide you are done. Be proactive to meet users’ actual needs. Think of their lives in a “day-to-day” scenario. Focus on how they organize their world and what could improve their study time. Get vendors and publishers to sponsor guest speakers to promote a lab.

There are several reasons why marketing is important for libraries today: fewer people visit the physical building; patrons want instant access; commercial search engines are in high use; people are becoming more “me”-centric; and patrons are unaware of how the library can meet their needs. Kerry quoted author Cynthia L. Shamel, “A library without a librarian is nothing more than a document storage facility....” A marketing plan includes researching your particular market, a SWOT analysis, SMART objectives, and planned brainstorming sessions.

Defining customers and knowing their needs gathered from focus groups/surveys are essential. SWOT analysis stands for defining your Strengths, your Weaknesses, the Opportunities that await you, and the Threats that stand in your way. A set of questions within each SWOT section will generate ideas.

The SMART objectives were also explained: Specific, Measurable, Achievable, Realistic, and Timed. Kerry outlined a brainstorming plan using the example of a library considering hosting a graduate student webpage as part of a marketing plan. Part 1 of the brainstorming plan requires seven blank pieces of paper, a writing utensil, a quiet room, and 45 minutes to answer these questions that bubble up:

1. Why are you doing this?
2. What are the top 3 or 4 factors affecting your library?
3. Who is your competition?
4. How can you overcome or compete with the competition?
5. What services are you going to promote?
6. How are you going to promote it; multi-channel marketing, online and offline?
7. What are your goals for the next 12 months?

Part 2 of the brainstorming plan defines realistic time measures of 30, 60, or 90 days towards your goals. Part 3 completes the skeleton plan by asking, “Does it make sense? Are the actions SMART? Do you want to share your ideas with your colleagues? Does it excite you? Can and will you do it?” Marketing can be online, e.g., Twitter, or offline, e.g., flyers.

Tonia Graves discussed what her academic library has been doing to promote library resources and what they would like to begin doing. Marketing has not been a consistent part of their vocabulary. Instead they have used the word “promotion.” At Old Dominion University in Norfolk, Virginia, they have been using six tools: flyers; LibNews, a weekly email service; “Daily News”; the Courier; new item notification; and the library website. Interested library staff members make the flyers. Workshops are presented on specifically targeted resources such as citation databases, special collections, and electronic business resources. The “Daily News” on the library webpage announces featured exhibits, for example, “World Jewelry”, “Criterion Collection Films”, “School Desegregation”, “Scoring for Suspense: Music for the Movies, and Political Campaign Songs.” The Courier is a monthly...
print and online newsletter for faculty, staff, and students authored by the university, but it will cease this summer due to recent state budget cuts. New item notification was created ten years ago, but is no longer accessible on the library’s website. It could re-emerge as an RSS feed. The library website has a limited set of people with permission to update the “News@ODU Libraries,” but this area is used to promote the library.

Tonia related that six months of data were collected to evaluate all promotional events. The statistics showed a spike of periodical usage during the promotional events. Tonia explained that efforts put forth have been “strong in traditional offline multi-channel marketing methods such as flyers, face-to-face, and events/workshops.” Tonia’s library plan is quite similar to that which Kerry described and the library staff is especially pleased about “identifying and knowing our users’ behaviors and needs.”

**ER Options for Acquisitions**

*Beth Holley and Jill Grog, University of Alabama; Jodi Kuehl, EBSCO*

Reported by Jo McClamroch

What a subscription agent can do for your library, in particular, managing “Big Deals,” was the focus of this presentation. Jodi Kuehl demonstrated many of the features which one agent, EBSCO, can provide to its customers. Other subscription agents provide similar services, such as sending alerts regarding format changes, verifying subscription prices and comparing them to previous years, creating a variety of spreadsheets to project future costs and cost increases, consolidating license details in a clear format, and more. Recognizing that libraries invest a great deal of staff time managing Big Deals, these services can be attractive, especially in tight financial times when cuts in staff may be contemplated at your parent institution.

*Beth Holley*, head of Acquisitions, gave an overview of their Big Deal packages. Prior to contracting the services of an agent, the University of Alabama Libraries used four systems to manage the life cycle process: an ILS, the Serials Solutions ERM module, EbscoNet, and Excel spreadsheets. Her philosophy is that it is best to consolidate all package titles with one agent while at the same time using other agents to handle other materials, such as standing orders and shelf-ready books. She presented a list of advantages for the library of using a single agent, for example, having a team of staff dedicated to your account. At the same time, some libraries might find it an advantage to manage their Big Deals directly with the publisher. She mentioned two disadvantages of using a single agent: having to pay a service fee, and putting all your eggs in one basket.

**Jill Grogg** wrapped up the session by describing a literature scan she conducted on articles discussing the merits and demerits of using an agent. One common theme was that a library needed to have confidence in their agent and to think of them as a “metamediary.” While many libraries continue to internally manage Big Deal packages, others have determined that the services an agent can provide are worth the fees. There is general agreement that Big Deal packages consume enormous amounts of staff time, require multiple systems to manage, and detract from equally pressing work that requires the same level of attention. As long as Big Deal packages exist, libraries of all types and sizes will be addressing this question of whether an agent can provide them the best support for their needs.

**Improving Our Local E-Serials**

*Wendy Robertson, Digital Resources Librarian; University of Iowa*

Reported by Virginia A. Rumph

Wendy Robertson presented an examination of the various choices that are currently available for digitization of local serials. She highlighted four software choices: journal management, e.g., Open Journal Systems and bepress’s EdiKit; digital asset management, e.g., CONTENTdm; institutional repository, e.g., DSpace and bepress’s Digital Commons;
and large scale digitization, e.g., the Google Book Project and the HathiTrust. Journal management software is designed for managing peer-reviewed journals, and can be either open source or licensed. In addition, the journal can have restricted or open access. Digital asset management software can handle images, text, audio and video. Since all articles in a journal issue are in one pdf document, article linking cannot be done. An institutional repository can also be open source or commercial and is usually created to store articles, not journals as a whole. Large scale digitization includes the HathiTrust, a partnership of CIC institutions, the University of California System, and the University of Virginia. It includes Google book content plus added features.

Robertson talked about currently published/born digital serials with back content in another system and those with print back issues. She also presented information about retrospective titles that are rare, primary sources, or are of local interest/locally published. Since time and resources are finite, each library needs to determine which items will be done by someone else, and which are so important to your organization that they deserve your effort.

The functionality you want also needs to be considered. For instance, if you need editorial capability, use a journal management system. Article linking, hierarchical structure, material length, the importance of visual browsing, searching vs. article-level metadata, and newspaper article segmentation all need to be considered. Title changes, shareable metadata, linking to other articles, preservation of content, gathering content together, and using XML to keep options open for future ways to manipulate the content must not be forgotten either.

Robertson gave examples of various ways title changes and variant titles are handled by these platforms. For instance, if all title changes are included together, the searcher may not find the particular iteration needed. Focusing on the preservation of content issue, Robertson illustrated with examples of titles that have changed form from simple typescript to very fancy layouts. Although the older form could be updated to match the new look, the original should be maintained to preserve the archival integrity of the material. A similar question or decision arises in the online presentation of articles that are broken among nonconsecutive pages. Should the original layout be maintained, or should the disjointed segments of the article be brought together?

Robertson strongly advises serialists to offer their expertise in the digitization process. We should understand our institutions’ local digitization plans, local titles should be included in the regular journals workflow, and our projects need to be realistic. See http://ir.uiowa.edu/lib_pubs/35/ for links to many examples.

Moving Mountains of Cost Data

Dani Roach, University of St. Thomas
Reported by Laura Secord

For libraries utilizing ERMS to manage their resources, one of the key issues is how to import the financial data needed to calculate cost-per-click information in their ERMS without manually entering cost data. Since July 2008, the NISO Cost of Resource Exchange (CORE) Working Group has been working to develop standards. These standards would facilitate the exchange of payment, product, and order information among integrated library systems, electronic resources management systems, and other interested parties, such as subscription agents. At this session, Dani Roach, a member of the NISO CORE group, shared the methods tested at her institution for extracting and transferring cost information between an ILS (Innovative) and an ERMS (Serials Solutions), pre-CORE. Dani also shared her experience of serving on a NISO working group, the resulting draft standard, and implementation issues and timeline.

The session began with an overview of the history of the CORE Working Group and the reasons behind its formation. Over the course of the past year, the CORE
group defined and drafted use cases; analyzed the use cases for common needs, vocabulary, and data elements; refined the use cases to identify essential CORE elements; constructed an XML message structure and a transport mechanism; and wrote a draft standard. Library input was critical in defining the elements of the use cases and identifying relevant data exchange scenarios.

In the absence of a standard such as CORE, the alternative options were evaluated and it was decided to use an application or software to facilitate the transfer process. Roach described the implementation of the process at the University of St. Thomas, which involved using Microsoft Access to facilitate the data transfer. She emphasized that one key to the success of this endeavor was to keep everything as simple as possible. Identify critical elements to include and focus on those rather than on populating all of the possible fields in the ERMS.

In conclusion, Roach encouraged session attendees initiating a project of this scope to document any decisions that are made along the way and shared her enthusiasm for having been a part of a NISO working group.

Online Serials Access X-Game

Christine Ryan, University of Tennessee at Chattanooga; Rose Nelson, Colorado Alliance of Research Libraries

Reported by Kathryn Wesley

In August 2007, the University of Tennessee at Chattanooga, a small metropolitan university with an understaffed, underfunded library, received a $17,000 invoice from their serials management vendor, Christine Ryan reported. UTC could not pay the invoice and the vendor would not negotiate a lower price. UTC’s contract with the vendor expired July 1, 2008. Their e-collections included 143 databases, 950 e-journal subscriptions, and access to 29,000 titles though aggregators.

In October 2007, Ryan attended the Tenn-Share DataFest and saw a demo of the beta version of Gold Rush, an electronic resource management system developed by the Colorado Alliance of Research Libraries (CARL) a nonprofit consortium. Rose Nelson from CARL explained that Gold Rush was developed for CARL’s member libraries, but is currently licensed to libraries throughout the U.S. Gold Rush could provide more services than UTC’s original vendor at less than a quarter of the cost.

With only nine months until their contract expired, UTC launched a project to explore alternative systems, select a new vendor, and migrate their data by July 1, 2008. Ryan called the project an “X-game” because of the extremely short timeframe, the extreme savings potential, the desire for extremely little disruption for the university’s students, and the potential to gain extremely valuable additional benefits.

The first step was to decide on features – which were required, which desired, and which expendable? They also needed to research other potential vendors. Considerations in this process included price to quality ratio, vendor stability, and the fundamental premise that they did not want to go backwards with regard to functionality. Other considerations included whether vendors provided trials or demos, existence and quality of user documentation, and what training would be provided. Three potential vendors were examined in detail on price, product features, and customer service qualities such as professionalism and communication. Gold Rush was selected.

A Gold Rush Implementation Team (GRIT) went into action. Pre-implementation work included retaining existing lists (databases, URLs, journal titles, dates); extensive testing of data, especially heavily used referring sources and targets, and sources with a history of problems linking to targets; and retaining vendor notification lists. During the course of the project, GRIT attempted to minimize user disruption while enabling adequate user feedback. Product launch was preceded by a promotional campaign.
Both Ryan and Nelson were pleased with the outcomes of the implementation. From the vendor’s point of view, it provided an opportunity for product enhancement and customer training. From UTC’s point of view, their goal of getting an improved product at an affordable price with excellent customer service was realized.

Gold Rush stores information in a collection of databases and includes a set of applications that can interact with the databases in a variety of ways, Nelson explained. Three of the applications are browser-accessible. GR Public provides holdings data; GR Linker is an openURL link resolver; and GR Staff is a management interface. The fourth application, GRX, is an optional XML client that resides on the desktop and provides access to holdings data.

Creating a Local Resources Index/Database

Debby Griffis, Information Services, Periodicals Librarian, and Wilhemina Cooper, Periodicals Manager, Richland County (South Carolina) Public Library

Reported by Stephen Headley

Griffis provided an overview of the history of the Local Magazine and Newspaper Index (LMNI) at the Richland County Public Library (RCPL). It had originated as an online database in mid-1994, but five years later was rendered obsolete as RCPL converted to a different ILS that could not support the index. After several RCPL staff completed an indexing class in 2002, there was renewed interest in reviving the LMNI. RCPL contracted with their ILS vendor to create a custom module for the index, which eventually went live in September of 2007. An Obituary Index and the South Carolina Vertical File (SCVF) Index were later added to the community resources module.

Reviving the LMNI was seen as beneficial to both staff and patrons. Its goal was to provide access to local publications that was not available from any other resource. It was decided that several local magazines would be indexed along with portions of The State, the local daily newspaper, which were not indexed elsewhere. Library of Congress Subject Headings would be used for the subject headings in the index. This would provide consistency with subject headings in RCPL’s catalog and various aggregator databases available to their patrons. Staff developed a list of recurring sections in each publication and decided which sections would be included in the index. These decisions and subsequent ones were communicated to indexing staff via RCPL’s SharePoint system, along with the delivery of documents that aided the indexing process.

Training was developed for indexing staff so that they could properly provide the data needed for the modified MARC records and the abstract field that were part of the index’s bibliographic records. They were also trained on the proper use of the Library of Congress Subject Headings. Two staff members were trained on how to maintain the quality of the records created by staff.

Other resources were added to the community resources on the RCPL website, including a Quick Facts database and an Obituary Index. The Quick Facts database contains reference questions that are frequently asked by patrons as well as their corresponding answers. The records for World War I soldiers who died in service are augmented in the Obituary Index with links to the digitized images of their obituaries that are housed on a Flickr account set up by RCPL. The SCVF Index was incorporated into the LMNI, providing access to a variety of ephemeral resources such as maps, photographs, articles, and pamphlets.

Griffis concluded by mentioning the means by which patrons can request articles from the LMNI. An electronic form is provided that allows patrons to request three articles at a time. After those are delivered, generally within 24 hours except on weekends, patrons may request up to three more. Griffis provided statistics showing how popular this service is. Despite the added time necessary to index these publications as well as the time it takes to deliver the articles requested by patrons, the LMNI and its...
accompanying community resources have benefited RCPL’s patrons and staff alike.

Managing Electronic Resource Statistics

Nancy Beals, Wayne State University

Reported by Alita Pierson

Nancy Beals of Wayne State University discussed the popular topic of statistics management. Every single person sitting in the audience knew the pain and challenges involved in shepherding such data. Beals’s presentation was a friendly introduction to how Wayne State Libraries (WSL) handles statistic management. Utilizing tools such as SUSHI and formal ERMs, Beals outlined a multi-pronged strategy that permits WSL to glean the maximum benefit from its electronic resources.

After a brief “What are we really talking about when we talk about electronic resources’ statistics?” introduction, Beals discussed the core components of WSL statistics management. Formal ERMs play an integral role in WSL’s data management; specifically, Beals discussed that they use tools from Scholarly Stats, Serials Solutions, and Innovative.

A distinguishing feature of the WSL system is the way in which it empowers selectors to analyze their own resources. It is one thing to have a bevy of tools at one’s disposal, but it is even better if more than one person can use them; Beals and her colleagues have ensured just that. Librarian selectors are provided with the tools and training to read and interpret the data churned out by the ERMs, but the best part is that they are not then left to fend for themselves. Their continuing statistics education is ensured by a quarterly series of “InfoSessions.” This fashion of embedding statistical awareness in the staff consciousness has proven invaluable in making sure that collection development is driven by accurate data.

Navigating a Course for Serials Staffing

Lynda Fuller Clendenning, Head of Acquisitions, and Lori Duggan, Head of Electronic Resources, Indiana University

Reported by Amy Carlson

Lynda Fuller Clendenning and Lori Duggan presented on the process of assessing and implementing an electronic resources workflow at Indiana University. One year following a consulting firm’s recommendations, the changes to personnel, skill sets, and workflow has increased service response to library users and other library constituents, while giving them greater opportunities for future collaborations.

With the increasing number of and reliance on electronic resources, the Acquisitions Department at Indiana University altered their approach to their workflow. The previous organization created independent units, unable to respond easily to increased demand. Fifty percent of their materials budget purchased an increasing number of electronic resources, while print resources decreased. Centralization of activities and increased response to users’ or library constituents’ electronic access emerged as key motivations for modifying the workflow. Recommendations for change included many opportunities to coordinate and standardize processes. They reduced duplicating activities between the different units, standardized procedures, coordinated more effectively with the Electronic Resources Management System, and increased the range of staff knowledge. R2, the consulting firm, presented their recommendation in the fall of 2007, which Indiana implemented by July 2008. Their new organization reflects increased coordination, increased communication, and integrated staff from each of their units to troubleshoot electronic access issues.

Duggan highlighted gains through the reorganization. They developed an Electronic Resources staff skill set to add to position descriptions and to prepare the staff for changes in work. They organized staff into the Serials and Electronic Resources Acquisitions administrative
team or SERA, to increase cross training, coordination and response time to problems. In addition, they streamlined communication and coordination of processing between the Technical Services, Collections, and Library Information Technology sections of the library and Electronic Resources. Fully implementing their ERMS is underway.

Enhancing access and streamlining processes gave them greater flexibility for the problems at hand as well as to plan for the future. This new flexibility may allow them to weather any staff shortages or budget problems, but also allows them to repurpose staff or look for new collaborations. Future roles may include a support role in Indiana University’s Scholarworks, the institutional repository, or processing and adapting to new formats. After one year with the new organization, Duggan reflected that the transition had been smooth and had given them opportunities to share ideas focused on the future.

Many of the questions from the audience concentrated on the Electronic Resources staff skill set, training and reorganization issues.

**KBART**

*Peter McCracken, Serials Solutions*

Reported by Glenda Griffin

Peter McCracken spoke to an audience at the 2009 NASIG conference regarding a joint undertaking of the United Kingdom Serials Group (UKSG) and the National Information Standards Organization (NISO). This ongoing collaboration resulted in the creation of the Knowledge Bases and Related Tools (KBART) project. KBART is aimed at improving electronic access for users through resolution of identified problems regarding the transmission and exchange of data between significant entities. According to McCracken, these entities, which include content providers, vendors and librarians, struggle with difficulties stemming from three major factors: bad data, bad formatting and lack of knowledge.

McCracken underscored the necessity for education and advocacy for content providers. Guidance should be directed, among other matters, on an improvement of the understanding of the benefits of OpenURL. Additionally, providers should be furnished more and better examples of exactly what information is desired from them. The magnitude of the end-users’ need for completely accurate data should be successfully communicated to providers and vendors, especially with regard to coverage dates and titles. Ultimately, McCracken emphasized the foremost importance of standardizing the “transfer of data within and among supply chain participants.”

McCracken highlighted the need for the use of standardized file naming structures, and just as important, he presented an example of a tab-delimited Excel file. The file contained key values providers and vendors could supply in an effort to improve the efficiency of communication and data transmission. Furthermore, he suggested parties exchange information often and consistently maintain contact.

KBART’s final report is forthcoming. Project members are currently considering whether or not to include an education section in the report and the possibility of establishing a Frequently Asked Questions website. Also under review is the topic of how to structure error reporting.

On a final note, McCracken conveyed the desire not to harm the positive efforts of providers who are currently providing correct and accurate data.

**Registration Ruminations**

*Kristina Krusmark, EBSCO; Mary Throumoulos, Rollins College*

Report by Laura Edwards

Kristina Krusmark from EBSCO and Mary Throumoulos from Rollins College, located in Winter Park, Florida, discussed issues registering online journals. In the summer of 2008, EBSCO commissioned a study to
identify challenges in managing electronic resources. About 50% of the libraries in North America participated in the study. One of the main problems affecting these libraries was registration and activation of online content. The survey found that the registration process is too complicated, usually due to missing information and incomplete instructions. Libraries are also losing staff that could help manage the registration process: 66% of library respondents have just one person dedicated to managing electronic resources.

Krusmark and Throumoulos noted the irony: as the number of online journals increases, the number of library staff to deal with them decreases. This can mean a delay in access to online content, especially if the registration process proves difficult. This could be problematic in a variety of ways, not least considering the fact that low-use journals are usually the first to be targeted for budget cuts. The survey found that this is the route 44% of library respondents take. However, one audience member pointed out that if links to online content have been provided in the catalog and A-Z list, and no one reports a problem accessing a journal that was not registered, it may make sense to target that journal for elimination.

Throumoulos shared some of her experiences in dealing with online content. She noted some of the issues she has encountered, such as unresponsive publishers and publishers directing subscribers to mailing labels for registration IDs. She pointed out that mailing labels are generally printed on material that is usually discarded when a journal is checked in. She stressed the importance of reading licenses, and establishing a workflow. She prioritizes online-only subscriptions, then by publisher (problematic ones first), title, and finally, where she is in the process of registering a title. Some audience members discussed their workflows. One participant sets up automatic emails for follow-up notifications during the registration process. Another audience member puts a “coming soon” note in her library’s A-Z list and catalog for new titles so users are aware that access may not yet be active. A third person prioritizes according to the length of grace periods for new journals.

Krusmark said that agents try to register on behalf of their customers as much as possible, since they know how problematic the process can be. When the publisher requires the library to do it, then the agent tries to provide as much information possible about registration details. She noted that libraries sometimes will examine the registration requirements for a journal before deciding whether to subscribe. They closed by summarizing areas for improvement: the need for more industry initiatives like SERU, increased standardization of publisher registration models, and a more efficient exchange of information between agents and publishers.

Creating Core Title Lists

Shirley Rais, Serials & Electronic Resources Librarian, Loma Linda University

Reported by Wilhemina Cooper

Ms. Shirley Rais, serials & electronic resources librarian at Loma Linda University, presented her tactics session “Creating Core Title Lists for Print Subscription Retention and Storage/Weeding” to an interested group of colleagues. Loma Linda University has 3,800 students, and its eight schools and programs are served by three libraries: the main Del E. Webb Memorial Library, the Jesse Medical Library, a clinical library that serves the medical center, and an unstaffed East Campus Library. Ms. Rais’s job responsibility is to manage all aspects of serials and electronic resources.

Ms. Rais was offered the help of a student intern in 2007, and decided on an appropriate project of consolidating their print serials’ usage statistics into one spreadsheet application. The intern’s questions about his assignment help to further define the potential of the project. The opportunity both to compile usage statistics and develop a useful list of core print subscriptions thus came to light and allowed Ms. Rais to move forward in articulating several important reasons
for the project, as well as expected benefits of the project. There were some in-house usage statistics, but these were widely scattered in multiple reports. Likewise, though the necessity of a core print collection was seen as valid, several factors made developing a reliable core list especially crucial. These factors included decreased space in the stacks, changes in user preference favoring electronic journals, the rising costs and lessening justification in maintaining both print and electronic formats, and concerns about digital and print preservation issues.

Ms. Rais explained it was then decided that the results of the project would meet three major goals: to develop a core list of subscribed titles that should be kept in both print and electronic formats; to show which subscriptions could be switched to electronic access only; and to identify print titles in the stacks that should remain accessible, be moved to storage, or withdrawn from the collection. In the end two core lists emerged: Core List #1, the top 450 titles, derived from current and non-current titles using print-only usage statistics from 1994 to 2006; and Core List #2, the top 300 titles, derived from current subscriptions using print and online usage statistics from the year 2000 forward.

Based on the resulting core lists, many helpful indicators were immediately revealed; for instance the top 450 titles accounted for 77% of the total usage! This type of information easily identified titles that needed to remain accessible, and also candidate titles for remote storage or withdrawal. The top 300 also revealed similar findings. They accounted for 76% of total usage, and allowed targeting of numerous titles to be switched to electronic-only access upon renewal. Some non-core titles will continue to be maintained because they are considered important for research needs, they are part of special collections, are appropriate for leisure reading, and several other considerations. Ms. Rais now has guidelines to follow, and expects the eventual savings from switching all journals except for the core collection to reach $50,000, a figure that should make university administrators very pleased.

Using a Local ERMS to Manage E-Journals

**Polly Khater, Smithsonian Institution Libraries**

Reported by Virginia A. Rumph

**Polly Khater** presented information about the Smithsonian Institution Libraries’ (SIL) locally developed and maintained database for the management of electronic resources. She also discussed the cataloging and ERM workflows, pros and cons of the current arrangement, and plans for the future. She emphasized that one size does not fit all; each library is unique, and the path it takes will be determined by its particular needs and resources. The SIL ERM is used to collect and track journal and database titles, vendors, ILL information, and PURLs for both paid and free content. It provides title access alphabetically, by keyword, and by vendor. Currently, over half the SIL e-journals are either in the Horizon catalog or in the queue waiting to be added. One step in the journals workflow is the determination of whether or not a title fits within the scope of the catalog, which explains why all SIL e-journals are not included in the catalog. If the decision is negative, the title is only added to the A-Z list.

Khater talked about the pros and cons of the current SIL e-journals management system. The pros include local creation and control of the ERM; ease of updating license and vendor information; use restrictions spelled out clearly; real time updating; SI purls generated; adding e-journal information to the print record in Horizon (most SIL titles are print + online); no external vendor costs; and intermediary click through. Khater’s list of cons includes the excessive amount of staff time and energy required; equipment and IT constraints; everything is done manually, title by title; no link resolver; cataloging backlog; no holdings in either the ERM or Horizon; and intermediary click through. The Smithsonian Institution Libraries’ staff members involved in the process are tired of the currently required duplicate data-entry into the catalog and the A-Z list. Various bottlenecks within the workflow also slow the process down. Khater is now on a committee evaluating options for the future: stay with the status...
quo; move all the titles into the catalog and scrap the ERM; or contract with a vendor for a commercial ERM. She voiced the opinion that the status quo is becoming increasingly unworkable, and some alternative will have to be found.

**NIH Mandate One Year On**

*Wm. Joseph Thomas, Head, Collection Development, East Carolina University*

Reported by Philip Wallas

The NIH Public Access Policy became permanent in March 2009. Joseph Thomas provided background information about the policy. The NIH Public Access Policy requires that final peer-reviewed articles based on research funded by NIH be submitted to PubMed no later than twelve months after publication. Thomas developed and administered a survey to learn how libraries engage their communities on issues of scholarly communication; specifically, how they have responded to the NIH mandate and what if any impact the NIH policy has had on the growth of institutional repositories. In addition, he researched scholarly communication activities and the NIH policy on websites for 100 ARL institutions and 52 academic institutions in North Carolina.

There were 54 respondents to the survey, with a strong majority from research intensive institutions. Outreach efforts for scholarly communications issues in general and for the NIH policy in particular were similar:

- outreach to individual faculty
- outreach to campus groups
- outreach to administration
- information on web pages
- campus-wide events, library sponsored or jointly sponsored
- posted materials
- news articles
- committees

For each method, the survey sought feedback on the effectiveness of the outreach. No single method was judged highly effective by a significant majority of respondents. Most institutions used a combination of various outreach activities.

The following scholarly communications outreach topics were most often cited:

- copyright management
- open access to view research
- complying with NIH mandate
- serials price inflation
- open access publishing opportunities
- institutional repositories

Notably, discussion of legislative advocacy regarding scholarly communication issues was not a frequent topic for outreach. Thomas posed the question of whether libraries should be more engaged in advocacy.

The survey found outreach specifically concerning the NIH mandate covered additional issues such as:

- how to comply with the NIH mandate
- alternative publishing models
- author rights

24 survey respondents have an institutional repository or plan to launch an IR within a year. Those with IRs reported growth in the last year, but did not associate it with the NIH mandate.

The review of websites found that most ARLs have web pages dealing with scholarly communication and with the NIH policy. 30 institutions have a “full house” — web material on scholarly communications and on the NIH policy, as well as having an institutional repository and a separate medical school library.

Thomas provided specific examples of outreach activities to principal investigators and other members of academic communities. He and audience members noted the role of departmental secretaries who may be handling NIH policy compliance for their authors.
In conclusion, Thomas underlined the opportunity for libraries to work with offices of sponsored research and to support alternative publishing models such as open access.

User Groups

SirsIDynix User Group

Sharon Dyas-Correia, University of Toronto

 Reported by Sharon Dyas-Correia

Approximately thirty SirsiDynix customers attended the Sunday morning user group meeting in Asheville. Sharon Dyas-Correia, SIRSI Serial Enhancements Forum moderator, led the session. She began by welcoming everyone, introducing herself and presenting a basic agenda. The group was polled as to which SirsiDynix product they currently use. Participants were disappointed when they were informed that a SirsiDynix representative was not available to attend the meeting. Sharon reminded attendees of the enhancement process for SirsiDynix products and encouraged users to actively participate on SirsiDynix lists and enhancement forums. She indicated that voting information is expected to be available in the summer.

Sharon presented key serials update slides provided by Jane Grawemeyer, the SirsiDynix product representative. The slides were originally presented in April 2009 at the SirsiDynix SuperConference held in Dallas, and included a summary of expected enhancements for Symphony 3.3. The expected enhancements announced included: new selections and print options in serial control record reports; a new rollover vendor cycles in serial control records report; a change title link helper; a modify vendor information tool; a search library list type behavior property setting; and a MARC holdings display tab on the view pane.

Considerable discussion of future directions and sluggish product development followed. Attendees expressed dissatisfaction that some enhancements announced as new developments over the past few years were still not working properly. Many tips and tricks were shared as well. Sharon asked if there were any final questions or comments and adjourned the meeting.

Brainstorming Session

June 6, 2009

Topic: Should NASIG consider open elections, or continue with the current vetting process?

Bob Persing moderated the discussion and reviewed ground rules and process for the meeting. There were approximately 93 people in attendance.

Question 1

During the election cycle, which works better, the NASIG nominee profile form, standard CV, or position statement?

This question resulted in lively debate with numerous comments as follows:

- If a candidate does not have an up-to-date CV they could opt to use the NASIG nominee profile form. If they do have an up-to-date CV they could edit that down and use that. That imposes less work on the potential candidate.
• Either is fine, but the expanded position statements are really helpful in deciding who to vote for.
• The position statement is really a key factor, so keep the expanded position statements.
• Questions on the profile form should reflect what is going to be asked on the reference questions. It wouldn’t hurt to have both the NASIG nominee profile form and the edited CV.
• CV should be limited to 5 pages.
• There should be something that is standard to each candidate so N&E can do some comparisons when reviewing qualifications.
• The increased length of the position statement is a real plus for voters.
• Have potential candidates do just the CV or profile form, then if they make to the next level they should be asked to write the position statement. Cut down on the work for nominees.
• Inform the candidates as to what the reference questions will be, so they can select the appropriate people to be references. It was noted that the reference questions are posted on the N&E website at http://www.nasig.org/about_elections_process.cfm.
• There were several comments that the N&E committee members should have a script to read from when talking to the candidates to make sure everyone is getting complete information.

**Question 2**

Should NASIG go to a totally open election process and abandon the vetting process for all positions, or just the keep vetting for the president and treasurer?

Some of the comments on this question are as follows:

• The current system has worked well for 24 years. We have added the petition candidate process, so in essence anyone with 10 signatures can get on the ballot. We should keep the vetting process. It is a valuable service.
• We should keep the vetting process.
• Service outside of NASIG should be considered more in the vetting process to allow newcomers to NASIG an opportunity to get on the ballot.
• Views outside of NASIG are important, so should have well rounded candidates to serve on the board.
• Current election process works well, and it should not be changed.
• N&E should have standardized questions and information to send to potential candidates.
• An open election process would have a ballot that would be unmanageable. We should keep the vetting process.
• The present process works well.
• If the open election process produced a very large ballot, there is a possibility that some would just not bother to vote. Keep the current system.
• It was noted that 50% of the N&E committee has to be new each year, so fresh perspectives are brought to the committee. Guidelines for N&E are at http://www.nasig.org/about_elections_process.cfm
• NASIG members should remember that if you have been through the vetting process and have not been slated, then you still have the petition process to get on the ballot. The slate is announced before the call for petition candidates. Online voting allows for more flexibility in timelines.
• Several expressed an interest in extending the timeline for petition candidates to get their paperwork submitted.
It was noted that a larger ballot might result in the need for more run-off voting.

A question was raised as to the length of time between the end of voting and the notification of successful and not successful candidates. The process was explained and the need to have all successful candidates notified and accept their positions, before non-successful candidates are notified. If an elected candidate declines a position, then the next highest vote receiver for that position would be the elected candidate. This process can sometimes take several days.

It was noted that with the advent of online voting, perhaps the N&E timelines could be adjusted. The NASIG Bylaws need to be consulted, as some of the timeline is based on the NASIG Bylaws language.

Persing thanked all for attending and for the great participation in the discussion.

Respectfully submitted,
Joyce Tenney
NASIG Secretary

Drafted 6/22/09
conferences. Emery noted the following accomplishments for this year:

- Administrative Support Task Force did a great job creating a job description for a paid staff member for NASIG. Unfortunately, due to economic conditions the project of hiring an administrative staff member for NASIG work was put on hold.
- The Rose Robischon Award was developed by the Awards & Recognition Committee.
- The John Merriman Award is being developed in conjunction with the UKSG and will be offered for the first time at the 2010 conference.
- There was a cover redesign of The Serials Librarian by Taylor & Francis with input from the NASIG Proceedings editors.
- The first NASIG UnConference was held in Kansas this spring and was very successful.
- NISO webinars are now offered to NASIG members at the NISO member rate and many NASIG members are taking advantage of this benefit.
- The Electronic Communications Committee has developed documentation for some of the administrative functions of the new web platform.
- Library School Outreach Committee has developed relationships with several library schools and is working to strengthen ties with this constituency.
- Membership Development Committee has completed the redesign of the NASIG membership brochure.
- Nominations & Elections has successfully used online voting for the second year in a row.
- Publications and PR Committee has been contributing to the Serials E-News, from the UKSG and working on additional guides.
- Joyce Tenney was appointed conference coordinator for 2 years.
- Buddy Pennington was appointed web liaison for 2 years.
- The task force to revise the speaker reimbursement policy developed and had approved a new policy. Members of the task force were Dan Tonkery, Ann Mitchell and Clint Chamberlain.
- The 25th Anniversary Task Force was created and is working on programs and events for the 2010 anniversary conference.

Report of the Treasurer

Whiting reported that the NASIG balance sheet looks good. We are conservative in our spending and have been monitoring our accounts. Earlier in the year we moved money from our Schwab account over to our savings account to protect the balance. Over the next year, the Financial Development Committee will be looking at our insurance policies. Lisa Blackwell is the new treasurer-in-training and will be learning the various functions and systems over the next year.

Report of the Secretary

Tenney reported on highlights of the executive board meeting.

The board reviewed NASIG committee annual reports and we would like to thank all of the committees for a great year. Highlights from committee report discussions are as follows:

- The board voted to accept the recommendation of the Financial Development Committee to have a vendor expo at the 2010 annual conference.
- Self publishing options for the NASIG Proceedings are being investigated.
- Buddy Pennington, the website liaison, will be working with committees over the next few months to develop a listing of options for enhancements and improving the functionality of the website.

For a full report please read the Executive Board meeting minutes published in the NASIG Newsletter.

Introduction of the 2009-2010 Board

Emery introduced the co-chairs of Nominations & Elections, Kathy Brannon and Tim Hagen, who introduced the incoming board members.
Recognition of Outgoing Board Members and Committee Chairs

Emery thanked all outgoing board members and committee co-chairs. She introduced the co-chairs of the Awards & Recognition Committee. Patrick Carr and Carol Ficken presented tokens of appreciation to all outgoing board members and committee co-chairs.

Call for Old Business

Emery introduced Bob Persing, parliamentarian for the business meeting.

Persing called for old business.

No old business was raised.

Call for New Business

Persing called for new business.

No new business was raised.

The meeting was adjourned at 4:15 p.m.

Drafted 6/18/09 jt; edited 8/12/09 cab

Board approved with correction: 8/7/09

Post-Conference Board Wrap-Up

Date, Time: June 7, 2009, 8:05 a.m. – 9:37 p.m.
Place: Renaissance Hotel
Asheville, North Carolina

Attending:
Jill Emery, President
Rick Anderson, Vice President/President-Elect
Peter Whiting, Treasurer
Char Simser, Past President
Joyce Tenney, Secretary

Members-At-Large:
Bob Boissy
Anna Creech
Kim Maxwell
Jeff Slagell
Virginia Taffurelli
Sarah Wessel

Guests:
Katy Ginanni, incoming Vice President/President-Elect
Lisa Blackwell, incoming Treasurer-in-Training
Carol Ann Borchert, incoming Secretary
Patrick Carr, incoming Member-At-Large
Steve Kelley, incoming Member-At-Large
Christine Stamison, incoming Member-At-Large

All agreed that it had been a great conference and that CPC and PPC did an excellent job. Special praise was given to the Renaissance staff for their outstanding level of service.

Emery noted the following action items:

The A&R and treasurer’s manual should include the following information:

- A $10.00 international calling card should be purchased for the Mexican Student Grant winner.
- The Mexican Student Grant winner should receive $75.00 in cash when they arrive at the conference for on-site expenses.
- The cost of the visa for the Mexican Student Grant winner should be included in the funding for the award.
Other A&R Issues:

Boissy reported that more information will be coming about the progress of the Merriman Award. He and Carol Ficken will continue their work on the award process over the summer and fall. The NASIG A&R Committee would vet the NASIG member and the UKSG would vet the UKSG member. Board members would not be eligible for the award during their tenure on the board.

Student Grant winners should be encouraged to apply for a mentor at the conference and the Mentoring Committee will let A&R know if any of their winners have not signed up so A&R can offer additional encouragement to sign up for a mentor. The process works better if it goes through the normal channels of mentor sign up.

Creech noted that some of the A&R documentation was lost in the website transition and Slagell volunteered to assist in reconstructing information and documentation for that committee. Carr will assist in the process.

Conference Presentations

A discussion of the whole issue regarding not displaying logos and the line between sales pitch versus explanation of processes, systems, or products was discussed and how to give attendees more information in the abstracts in the program to determine what they would like to attend. Kelley will work with PPC to insure sufficient information is in the program to determine if it will meet the expectations of the attendees.

Discussion group logistics need some attention next year. Try to have them far enough apart from general lunch conversations and other groups, so attendees can easily hear the conversations. Tables for eating are useful, so need some areas to spread out.

The registration form for next year should have a checkbox next to special events to see if people will be attending. This should help in cutting down on the cost for events where significant numbers do not attend all conference events.

It was agreed that the final decisions on vendor expo cost and time would be made in the next few weeks to be published for participants in the 2010 conference.

Suggested timeframe was Thursday from 1:00-4:00 for vendor expo, then have the First-Timers Reception from 4:15-5:15 then have opening session from 5:30-6:30 then reception.

It was proposed that PPC give estimates to CPC on the number of attendees expected at the strategy and tactics sessions and not have attendee signup for these sessions. This will cut down on the work of the registrar and alleviate some of the technical problems with the registration system.

Blackwell suggested that committee meetings be given the option to have AV. It was agreed that if they need this it could be included in their committee budget and get the information to CPC early in the conference planning process.

It was suggested that CPC have a row of power cords in the front of the room so the bloggers could have place to plug in and have a seat.

Wireless access in the meeting rooms was a big hit; Tenney will investigate cost of this for the 2010 conference.

Bottled water for the 2010 conference should be purchased from a discount facility and handed out at registration. Bottled water and bottled juices from hotels/resorts are very expensive and should be avoided if possible.

Possible topics for 2010 were discussed and it was agreed that cutting edge issues need sessions.

User group meeting may need AV, so they should be treated like regular sessions and fill out an AV form to determine needs and costs.
Holding the brainstorming session right after another meeting without a lag time worked well. The board agreed that PPC/CPC would add additional information into the conference packets/schedule to promote the business meeting to attendees.

It was agreed that the 9:00 a.m. start time for sessions worked well and should be continued next year.

Drafted 6/16/09 by Joyce Tenney; revised 8/12/09 Cab

BOARD APPROVED with correction: 8/7/09

**Conference Evaluation Summary**

*Riding the Rapids Through a Mountain of Change*

*June 3-7, 2009*

Submitted August 6, 2009 by: 2009 Evaluation & Assessment Committee

Ann Doyle Fath (chair), Janice Lindquist (co-chair), Jana Brubaker, Sarah Corvene, Smita Joshipura, Barbara McArthur, Virginia Rumph, Martha Spring, Christina Torbert.

NASIG’s 24th annual conference was held in Asheville, North Carolina. The conference featured three preconferences, three vision sessions, thirteen strategy sessions, fourteen tactics sessions, and nine poster sessions. Other events included an opening reception at the Marriott Renaissance (the headquarters hotel), a special dinner and tour at the Biltmore House, and a reception at the Crest Center.

This year, 242 of the 448 conference attendees filled out the online evaluation form. This 54% response rate reflects a drop of 9% from last year’s response rate (63%, or 328 of 520), which had been an increase of 9% over the previous year. This was the second year that evaluation forms were only available online. As a special incentive to fill out the forms, the Executive Board once again approved a drawing for a free conference registration for 2010 or 2011. The drawing was entered by 176 of the individuals who filled out the evaluation forms. The winner will be announced in the *NASIG Newsletter*.

**Conference Rating**

Respondents were asked to give ratings on a scale of 1 to 5, with 5 being the highest rating. The overall rating for the 2009 conference was 4.31, almost equal to last year’s conference, which rated 4.35 overall.

Ratings for several aspects related to conference facilities and local arrangements averaged 4.22, slightly lower than last year’s 4.30. Comments reflected a love/hate attitude about the conference location in Asheville. Many had major difficulties with the logistics and/or expense of travelling to the conference site. Most offered the opinion that they loved Asheville and the conference’s proximity to downtown shopping and dining. This helps to explain that even with the negative aspects relating to travel and expense, respondents still rated the Asheville location an average of 4.35, higher than the previous two years’ ratings of 4.15 (Phoenix) and 4.18 (Louisville).

The meeting rooms (4.16) and hotel rooms (4.43) received a slightly lower rating than last year. Negative comments related to a lack of satisfaction with the Sheraton, the location of the Internet Cafe (not in the headquarters hotel), and the lack of free wireless in all sleeping and meeting rooms. Many commented that the meeting rooms had a variety of serious problems with audibility, some due to the shape/layout of the room and others due to noise easily penetrating from adjoining areas.
The meals (4.07) and breaks (4.11) were also rated somewhat lower than last year. Attendees were overwhelmingly pleased with the opportunities for breaks and small group interactions. About twice as many comments noted a desire for light snacks at the breaks as those who appreciated the absence of temptations. A number of respondents requested a sugar-free, caffeine-free option other than water at the breaks.

Social events rated 4.18, almost equal to last year’s 4.19 rating. Many attendees noted (as they did last year) that they would prefer to have organized sign-up sheets for dine-arounds as in previous years. Comments also indicated that people still desire late-night social times/activities/spaces designated as they have in the past.

Online conference information, including the conference website, forum, and conference blog, rated 4.20 (last year, 4.24), 3.78 (last year, 3.58), and 3.77 (last year, 3.51) respectively. Comments suggested that there may be some confusion over the purpose of the forums and blog, including why information went out in different ways and their intended application before, during, and after the conference.

For the second year, NASIG used an online store for conference souvenirs rather than having to order, stock, and sell products on-site. Most respondents (79%) have not visited the store or have no opinion about it. Those who are happy with the selection came in at 19% and those who are not at 2%. Some indicated that they would have bought items if they’d seen them on-site, but would not remember to visit the website (CafePress).

The majority of respondents were pleased with the pace and scheduling of the conference, though many comments suggested moving the time of the final vision session to an earlier slot to allow those who had to catch afternoon flights to attend.

Many attendees expressed their thanks to the Conference Planning Committee and Program Planning Committee for all their hard work.

Program

This year the program followed a “no-repeat” format where most sessions were not repeated. Of those who commented on this aspect of the program, most preferred the session not to repeat. Respondents were asked if the layout and explanation of program choices was easy to understand. This area received a 4.16, increasing for the second year in a row, up from 3.98 last year (Phoenix), and from 3.47 in 2007 (Louisville).

Respondents were also asked if there was a balance in the types of programs offered. This aspect rated 3.96, nearly the same as last year’s 4.02, up from 3.95 the previous year. Again, like last year, few people recommended the Electronic Resources & Libraries conference as a model for how to do the program. The largest complaint about the balance of the program was the perceived lack of cataloging/metadata-related sessions during the regular conference. Those who could not spare the time or expense of the preconference (or had taken the SCCTP workshop in another setting) had sparse selections available to them during the main program times.

This year the conference featured three vision sessions. Peter Morville’s “Ambient Findability: Libraries, Serials, and the Internet of Things” received a 4.32 rating. “Measuring the Value of the Academic Library: Return on Investment and Other Value Measures” with Carol Tenopir received a 3.98 rating. The final vision session, “What Color Is Your Paratext?” with Geoffrey Bilder rated a 4.51. The average rating for vision sessions this year was 4.27, up from last year’s average of 4.07.
The thirteen strategy sessions this year generated ratings from 3.32 to 4.49, with an average rating of 4.04. Nine of the programs rated 4.0 or higher, with the highest rating going to “Playing the Field: Pay-Per-View E-Journals and E-Books,” presented by Lindsey Schell, Katy Ginanni, and Benjamin Heet.

There were fourteen tactics sessions offered in Asheville. Ratings ranged from 3.56 to 4.28 with an average of 3.67. Seven sessions scored 4.0 or higher. The highest-rated tactics session was Dani Roach’s “Moving Mountains of Cost Data: Standards for ILS to ERMS to Vendors and Back Again.”

Nine poster sessions were presented this year. Ratings ranged from 3.49 to 4.08, averaging 3.77. Lisa Kurt’s “Making Usage Data Understandable with Visual Representation” received the highest rating of the group.

There were three preconferences offered this year with ratings from 4.50 to 5.00, with an average rating of 4.73. The SCCTP “Electronic Serials Cataloging Workshop” received the highest overall rating of the group.

**Other Conference Events**

In Asheville, the user group sessions averaged a 3.80 rating and the informal discussion groups averaged a 3.78 rating, both up from last year, even though the comments reflected major difficulties in the logistics, especially of the informal discussion groups (one group lacked a leader, other groups were too large for the tables, and the room was ill-suited to concurrent group discussions so many could not hear). The majority of respondents would like to continue both types of sessions, especially the informal discussion groups. The two main observations about the user groups consisted of the fact that one person often used more than one vendor for various products, making the choice of which to attend difficult, and that vendor representatives often were not present, which defeated the perceived purpose of the session. Two respondents commented that they missed the vendor speed dating session from last year.

The First-Timers/Mentoring Reception rated a 4.20, up from 3.93 in 2008, with over 90% of the respondents favoring the continuation of this event in the future. The brainstorming session received a rating of 3.74. Sixty-four percent of respondents support continuing this event in the future. Comments indicated that the session did not truly consist of “brainstorming,” but that it was much less contentious than those in past years. The business meeting rated a 3.63. The “Meet the Board Members” session received a 3.29, down from the 3.47 rating of 2008, and majority (60%) support for its continuation at future conferences. Comments revealed that many attendees did not remember that this session took place at all, could not find it on the conference schedule, and could not determine its purpose. Board members who commented thought it might work better with a less formal, structured approach. One respondent suggested name-tag flags with a special designation so they would be easily identifiable.

**Respondent Demographics**

![Respondents by Organization Type](image_url)

- Academic Libraries: 72.4%
- Vendors & Publishers: 12.4%
- Specialized Libraries: 5.4%
- Government Libraries: 2.3%
- Other Libraries: 7.5%
As in past years, academic library employees represented the largest group (72.6%) of respondents. This includes university (152), college (21), and community college (2) librarians. Responses from the vendor and publisher community, including subscription vendors (8), publishers (8), database providers (1), and automated systems vendors (1), comprised 7.5% of the total respondents, down from 9.5% last year. Attendees from specialized libraries, including medical (9), law (8) and special or corporate libraries (7) made up 12.4% of respondents. Other types of institutions included government, national, or state libraries (5.4%); public libraries (2.5%); students (0.8%); and those selecting “other” (0.8%).

Respondents were asked to describe their work, selecting more than one category as applicable. The largest respondent groups identified themselves as serials librarians (51.9%), electronic resources librarians (38.2%), acquisitions librarians (28.6%), and catalog/metadata librarians (24.5%). Collection development librarians comprise 16.2% of respondents, technical services managers make up 14.1%, and licensing/rights management positions also constitute 14.1%. Reference librarians comprised 14.2% of the respondents. All other categories were selected by fewer than 10% of respondents.

When asked for their amount of serials-related experience, the majority of respondents (53%) are in the first decade of their careers, including those with less than a year (6), 1-3 years (37), 4-6 years (42), and 7-10 years (42). Those with 11-20 years experience comprise 23% of respondents and those with more than 20 years comprise 24%.

Most were repeat NASIG attendees: 39% of respondents had attended 1-5 previous conferences, 17% had attended 6-10, 11% had attended 11-15, 5% had attended 16-20, and 2% more than 20. First-time attendees represented 26% of respondents.

The Evaluation & Assessment Committee would like to thank everyone who took the time to fill out the online evaluation forms. We continue to be impressed each year with thoughtful comments that reflect a strong interest in continuing to improve upon the high quality conference NASIG puts on each year. Your comments and feedback are vital to the success of future NASIG conferences.

**Award Winners Evaluations**

Following the NASIG conference in June, the Awards & Recognition Committee surveyed award winners who attended for feedback on their conference experiences and the awards process. A&R’s questions and award recipients’ answers are below. Individuals are not identified.
**Why do you feel it is worthwhile for newcomers to the field of serials to attend a NASIG conference?**

- Most library schools do not offer classes dedicated to serials—I found that the conference was beneficial to me because I finally had a forum to learn about and discuss serials in their own right. I would recommend that anyone with an interest in serials attend the conference because it’s a great introduction to the field and the issues that serials librarians deal with.

- Although NASIG conferences have corporate sponsors I like the idea that companies do not make presentations or have booths at the conference. A newcomer in the field of serials can attend presentations on current issues in our field without having to worry about sales pitches or vendor booths. This relaxed and friendly atmosphere encourages discussions between newcomers and veterans.

- Serials often get mentioned as a sidebar in library school, so conferences and workshops are really the only way one can learn and share knowledge in the field. The NASIG conference is especially important because it brings hundreds of serials professionals together.

- The NASIG conference presents a unique and valuable experience, shared with like-minded individuals from across the continent (and elsewhere as well!) striving to meet similar challenges. It is an opportunity to develop and share new ideas as well as an outlet to forge new connections with very smart, dedicated peers from far and wide.

- It’s a whole new world to explore, it opens so many doors to our careers.

- Not only are the sessions informative about the current trends in serials work, but it’s really great to be able to talk with people who have the same interests and hear that they’re often thinking about and dealing with the same problems that you’ve come across in your daily dealings with serials. Everyone I met at NASIG was very friendly and genuinely seemed to want to help newcomers learn more about the field as well as make sure they were having a good time.

- The conference broadened my knowledge of serials a great deal. Working in cataloging, I only get one small glimpse into the everyday activities of what serialists do. The conference allowed me to hear all about different organizational structures, workflows, and serial issues that I was not familiar with prior to attending.

- The NASIG conference represents a wealth of serials knowledge drawn from the expertise and experience of its attendees. The group is very welcoming and eager to share their know-how with newcomers.

- It’s worthwhile because not only do you get the opportunity to network with others around the country and world but you also have the opportunity to learn from your colleagues.

- To feel a sense of community in the field, and have the opportunity to freely share new ideas with people who are going to get it and to learn new ideas in context.

- Yes, there were so many very informative workshops that pertain to all things that serialists have to deal with. There were so many tips, references and procedures that will be very beneficial to anyone working in serials.
How did attending the conference benefit you personally?

- The conference really cemented the fact that I do want to pursue serials as a career. I took away a lot of new ideas and strategies that I can apply to my position at the Wisconsin Historical Society.
- My wife HATES when I talk about library related matters in general, so discussing the latest in electronic resource management is definitely out of the question. It was great to meet people who shared my own interests and were excited to discuss them!
- I took away information from the sessions that is going to help [me] both at work and with school projects. In fact, one session inspired a project at work that I am also going to use for a class I am taking this semester. That, and it was just a lot of FUN.
- I had the good fortune of being able practice hours of piano over the course of the weekend on what was really a beautiful instrument in the lobby of the Marriott. However, besides this, I made friends that I am sure I will keep in touch with over time. I made valuable contacts that will undoubtedly prove very helpful in the future. I also gained a much more refined perspective from which to observe the profession and myself in it. For that I am very grateful.
- It was a whole new world from what we have in Mexico, I got so many great ideas from what I learned during the conference, and even though there are a lot of things I can’t apply to my university [due] to the very low budget we have, I found out ways to increase that budget and get benefits from other institutions. Now I can transmit all I learned to my fellow students and professors and together we can make a change in our libraries.
- This was my first library conference, and I found that the greatest benefits I got out of it [were] a) sitting in on the sessions where I was able to hear more about tools and resources in the serials field; b) hearing from librarians that they don’t have all their answers either; c) being able to make a joke about serials and people actually finding it funny.
- In addition to learning a great deal about serials, I also got to meet a lot of interesting and wonderful people. I hope to stay in contact with those individuals and, as a result, stay more current in the field.
- By attending NASIG, I got to personally meet many librarians who are doing great work in the serials field. I also had a chance to chat with NASIG President Rick Anderson and talk with him about becoming more involved with NASIG through a committee assignment.
- Attending the conference gave me the chance to sit in on sessions where I could learn about new library trends and possibly use some of what I learned in my own institution.
- I forced myself to meet people and connected with old colleagues/friends. I left feeling more part of a larger community of colleagues and friends.
- Yes, I learned a lot about the vendors, publishers and programs that will be very useful for the future. And there were many workshops that are still clear in my mind that contain information I’m using every day.

Student Grant winner Susan Clay.
Did attending the conference influence your career plans? If so, how?

- As stated above, I feel more certain that going into serials is the right decision for me. I was always interested in serials, but I was afraid that it would be difficult finding a job in the field. Having the opportunity to talk to other serials librarians made me feel more confident both in my decision to pursue serials and my marketability when applying for jobs.
- Prior to attending NASIG, I’d already worked over seven years in the library field. After four years of part-time study, I am one course away from completing my MLS. Attending the conference just confirms that I have chosen the right profession.
- It affirmed that I really enjoy working in the serials field, that there are others who do as well, and has me strongly considering staying in the field after I receive my degree.
- Not directly, though the conference certainly made me feel much more confident about the work I am doing and my prospects for the future. That is a welcomed result of having attended the conference.
- Yes, I’m working right now digitalizing the libraries for the high school district of the state, these libraries are very poor in many resources and I now have plans of making a big change developing donation programs, training librarians and using all the free online resources as well as increasing our budget to be able to buy other online resources.
- Attending the conference didn’t influence my career plans (I decided awhile ago I wanted to work with serials), but it did make me want to become more professionally involved in organizations like NASIG.
- Yes, I enjoy cataloging a great deal but the conference made me see that there is a great deal of other interesting work going on in the field in other areas. As a result, I hope to not pigeon-hole myself as a cataloger.
- Not really — although it did reinforce my decision to pursue work in serials.
- Not really.
- Just gave me more confidence

- Yes, I am very excited to start library school and get my masters. So many friendly people were able to help me get started.

Sofía Elizabeth De La Mora Dozal, the Mexican Student Grant winner.

What can NASIG and/or the Awards & Recognition Committee do to improve the program for the award you received?

- I can’t think of anything other than perhaps publicizing it more.
- I don’t see any way to improve the program for the award. The application process was clear and simple. The plaque was a nice touch as most awards come only with certificates. I would encourage NASIG to continue offering all the awards that are being offered at present. Very few organizations offer awards that embrace all individuals in our field — new and veteran serials professionals, paraprofessionals, international serials professionals, and students
- I can’t think of anything...
- I was completely impressed with just how much I received through this award. I could not be more happy with the conference or the award.
- Well, for us in Mexico it is very hard to attend a conference like this one. We don’t have any support
from our institutions nor the government, very few people [know] about NASIG. I think it is important to promote this award a lot more through the Mexican Library Association as well as through the few library schools we have in the country.

- It would be nice, I think, for all award winners to also earn a guaranteed place on a committee. This would be a good way to keep newcomers to the organization involved in NASIG.
- Some descriptions on the website said my award included a committee assignment, but I never received any communications in that regard. I was able to pursue a committee assignment on my own, but it would have been nice to have the award committee helping to facilitate.
- The program for the award I won seems fine.
- Have a session on MLS programs and related issues. Compare programs, coursework, issues... Although this could be open session for anyone.
- I think everything was perfect. Everyone was helpful, friendly and informative.

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

- I have no complaints except that I would have liked to stay at the hotel where the conference was.
- The conference experience was perfect. Communications between NASIG and the committee and myself were perfect. Accommodations were great. The conference was the right size (not too large to get lost). Presenters were excited to present their findings. Overall, it was the best conference I’ve attended in my short serials career.
- I was a little uncomfortable at the first-timers reception because I was one of the only ones there who didn’t sign up for the mentoring program. Had one other non-mentee not wandered over, I would have been sitting alone. Maybe not be so strict with the seating at the reception, leaving a few empty places at tables for those not doing the mentoring? I definitely felt pushed out of the group a bit.
- Make sure the Sheraton opens their pool in time for conference attendees?
- Everything was great during the conference, I enjoyed it very much and learned a lot, the thing I consider important is that there should be a committee in charge of keeping track of the award winners to encourage us to participate more and try to attend next year’s conference, for me it is very difficult due to the lack of support from any institution I belong to or participate on, our budget is very low.
- Everything was lovely. I had a wonderful time and came home extremely tired but full of new information.
- Perhaps the award winners could have other group activities or at least a designated table at which to sit during one of the receptions to get to know each other better and make the conference less intimidating?
- Maybe organize a social event for award winners and mentors outside of the conference environment — at a restaurant for example.
- I had a wonderful experience at the conference. If there is anything I would comment on, it is that the...
program booklets for the conference seemed a bit confusing. I had to double check a few times to make sure I attended the sessions I wanted to attend.

- I had a great time. I think it went very smoothly and problem-free.

- The Horizon award was recommended to me by colleagues who are NASIG members.
- From the website.
- Website.
- Online and my supervisor told me about the membership.

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

- On the SJSU SLIS website—they have a list of grants and scholarships from external organizations.
- The library science student listserv at my university.
- SERIALST, and the Syracuse University MLIS Listserv.
- I learned about the NASIG awards through Kim Maxwell, head of the Serials section in Acquisitions and Licensing Services here at MIT.
- I first heard about it from a professor at the university, Dr. Javier Tarango, and I started investigating in the web and that was when I decided I wanted to attend the conference.
- A coworker had received the student grant a few years ago and she told me that going to the NASIG conference was a great experience. Also, my supervisor encouraged me to apply.
- From my boss who is a previous recipient of a NASIG award.

Where should NASIG be promoting awards?

- Student listservs/email groups. I think the most effective way to promote NASIG among SLIS students is to have an ambassador of sorts at each library school. Having an insider would be helpful because they can identify the best ways to reach other students—for example, SJSU has a Yahoo! Group that most students belong to that gets far more traffic than official channels of communication.
- Library schools, NASIG website and Newsletter, and library listservs.
- The student awards should definitely be promoted at library schools...but the fact that I heard of the award both through work and school means you are doing something right!
- At graduate schools catering to Library and Information Science degree-seekers?
• It would be a very good idea to promote more awards like this one in Mexico, one is very few for all the people that would really like to make a change in libraries, we don’t have enough resources, as I said before.

• I think NASIG already does this, but MLS listservs, as well as maybe asking former awards winners to spread the word around their campus.

• NASIG should take advantage of available list serves and also post to Library Schools’ web pages if at all possible.

• Serials listservs are usually the place, and I did see the award appear on a couple of the listservs I monitor. For the student awards, it would probably be a good idea to get in touch with communications directors at library schools. As a student, I never heard anything about NASIG or its awards.

• Not sure.

• To library schools, on listservs, at ALA.

• I think their website and the listserv are working just fine. I’m not sure where else would be viewed.

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

• Nope! Thank you so much for the opportunity to go to the NASIG conference. I enjoyed the experience and I’m working hard to persuade my employer to send me to Palm Springs next year!

• Keep the casual dress! It makes for a very comfortable and relaxing conference experience!

• I had such a great time at the conference...I am definitely going to remain a member of NASIG following this year! Thank you!

• I was really happy to attend the conference. I feel I got a lot out of listening to the various speakers but also the experience in general. I appreciate everyone’s hard work in getting me there and giving me treatment that went above and beyond the call of duty.

• Please promote this award more in Mexico and if it’s possible increase the amount of awards for our country. I disagree with being unable to apply again for the award if we’ve been there before. Some of us would like to attend again and don’t have another way to do it. I’m very grateful to all NASIG for all the support and help I received, for all your kindness, too.

• Thank you so much for allowing me to attend the 2009 NASIG conference! I had a wonderful time and will be back again!

• I had a wonderful time and am so thankful to NASIG for my award. I look forward to being involved at next year’s conference and in the months ahead as a member of the Library School Outreach Committee.

• I just wanted to thank everyone for a wonderful trip and conference. I am very grateful for this opportunity.
Our new NASIG president is a familiar name to many as he is a prolific writer and frequent speaker at professional conferences. In doing some background research on Rick, I discovered he is a man of diverse interests and talents which will be readily apparent in reading this column, not least of which is sharing my preference for dark chocolate!

NASIG will be holding its 25th conference in 2010. Any thoughts on how NASIG can thrive and succeed for another 25 years?

I think our 25th anniversary is coming at a very exciting time, when NASIG is in an important transitional period. The last few years have seen us reexamine our financial posture, take a hard look at how well we’re living up to our mission, undertake a thorough strategic planning project, and reach out to parts of our core constituency that have sometimes felt marginalized or unappreciated in the past. Recent NASIG presidents have done incredible work to move the organization into a better position for the future, and I want to build on what they’ve done so that, when we meet in Palm Springs next year, we’ll be able to say that NASIG is in the strongest position it’s ever been to make the world a better place for scholarly communication in general and for the serials information chain in particular. The question is, once in that position, how do we make the most of it? I think our success and vitality over the next 25 years will depend on our ability to do several things: make NASIG an equally hospitable place for all participants in the serials environment; help each other navigate the extremely choppy waters of the recession; and work together to redefine and expand the ways in which we can all make ourselves mission-critical to our sponsoring institutions.

How has NASIG impacted you professionally and personally?

Some of the most impressive, inspiring, and helpful people I’ve ever met in our profession have been NASIG members. I don’t think any other organization in the information world offers better opportunities for service, networking, and the exchange of exciting ideas. For most of the past decade, NASIG has been where I’ve focused my national involvement, and I haven’t regretted it for a second.
Did you always want to become a librarian? What led to this career choice?

There were a lot of factors, but I think the most important one was simply that I’ve loved libraries for as long as I can remember. Some of my earliest and happiest childhood memories are connected with libraries. I worked in my university library as an undergrad, and when the opportunity to go to library school came along I realized that I loved that environment and really liked the idea of spending my career there.

Have your thoughts on what it means to be a librarian changed over the course of your career? How?

Like many of us, I initially thought that I wanted to be a librarian because I love books. But I eventually realized that what I actually love is libraries, and all the things that libraries make it possible to do. I still love books very much, but as a professional I see them as one tool among many for connecting people with the information they want — whether what they want is a good book to read or an elusive factoid or a pile of articles for research use. To me, what makes being a librarian worthwhile is helping patrons. I just love the feeling that I’ve cleared away an obstacle and made it possible for people to find and read what they want to read. I also like the fact that being a librarian can mean doing so many different things. Every day when I walk through the door of the library, I feel like I’m entering an intellectual playground. It’s incredibly energizing to me. I may have gotten only four or five hours of sleep the night before, but when I come through the library’s doors I can feel my batteries instantly recharge.

You started publishing CD HotList: New Releases for Libraries in 1999 (http://cdhotlist.btol.com/). You are also the editor for the “Sound Recordings Review” section of Notes (the quarterly journal of the Music Library Association). How did this come about?

I’ve been writing music reviews in a variety of outlets since 1990. In 1999 it finally dawned on me that no librarian could possibly comb through every one of the hundreds of new-release announcements that come out every week, that I was doing some of that combing-through already as part of my freelance reviewing, and that some of my colleagues would probably appreciate being given a condensed heads-up about titles I was seeing that might be of particular interest to libraries: significant reissues, world-premiere recordings of obscure works, new releases by unusually interesting artists, etc. So I started a very simple web page that I updated with 12-15 new releases each month, providing full ordering info for each entry along with a brief explanation of why it struck me as significant. It was received very well. After a few years I got too busy to do it all alone anymore and I brought a few contributors onboard to help. In 2004 I signed CD HotList over to Baker & Taylor, and now they pay me to edit it. Our coverage has expanded to 40-plus titles each month, and because it’s hosted by a vendor you now have the option of clicking right through the review to order (though you don’t have to be a B&T customer to use it - CD HotList is freely available to the public). I joined the Notes editorial staff in 2004 after contacting the editor and saying “You know what? It’s kind of crazy that you guys have columns for book reviews and for reviews of music scores, but no column for CD reviews.” She agreed, and I’ve been editing that section of the journal ever since. I also write between five and ten reviews per week for the All-Music Guide (http://www.allmusic.com).

You’ve worked at several libraries over the course of your career as well as at YBP. What was it like working for a vendor?

It was absolutely great, for a number of reasons. For one thing, I learned a lot about publishers – who publishes what and in what amounts, how discount programs work, which publishers have strengths and weaknesses in particular areas, etc. Even better, I basically acted as an adjunct member of the acquisitions departments of dozens of libraries, big and small. That was hugely beneficial. When I left YBP and went to...
work for UNC Greensboro, I already knew the staff, knew their approval plans, knew their areas of subject focus. What was best about working at YBP, though, was that I got to learn about the scholarly information business from some of the smartest, kindest and most knowledgeable people I’ve ever known: Bob Nardini, for example, was and still is one of my biggest heroes; I feel the same way about Rick Lugg, Ruth Fischer, Mark Kendall, Rob Norton, and many other YBP employees and alumni at whose knees I learned much of what I know about librarianship and the book trade. I would advise any librarian who’s interested to take a sojourn on the vendor/publisher side, even if only for a few years. It will absolutely make you a better librarian.

What was it like moving around the country—Greensboro, North Carolina, Contoocook, New Hampshire, Reno, Nevada, and now Salt Lake City. Where do you consider “home”? I thought I read you were born in Massachusetts but went to college at Brigham Young in Utah.

As far as I’m concerned, home is wherever my wife and kids are. But yes, I grew up in Arlington, Massachusetts, and I will always feel a bit out of place anywhere outside of New England. That said, I’ve enjoyed everyplace we’ve lived so far and there are things I miss about each of them. I’m especially grateful for the fact that my kids have had the experience of living in very different regions of the country; I think it’s helped them develop a certain broadmindedness and empathy that might not have come so easily to them otherwise.

Library Journal named you a “Mover and Shaker” in 2005 in the Rebel category as one who “thinks differently.” What inspires you to think differently?

Well, first of all, it’s important to distinguish between being different and being right. I think I’m more often the former than the latter. That said, though, I do have a tendency (and it’s not always a healthy one) to question my in-group — I think I’m a very nontribal person by nature, I’m not a joiner, and I’m usually more interested in figuring out what I and my group are doing wrong than in celebrating what we’re doing right. At a rational level, I just think it’s a more useful approach to life and work — if we’re doing something right, that’s great, but why waste energy in patting ourselves on the back when we could be figuring out how to do even more things right? But at a non-rational level, I think I just have kind of a contrary streak. I don’t trust rah-rah; the louder we yell about how wonderful we are as librarians, and about how much everyone loves us, the more suspicious I get about why we feel the need to proclaim it so loudly. Really, though, this is an area where I think I need to change somewhat: back-patting does have its place, and so does advocacy, and it’s important to know what you’re doing well. It’s especially important for staff to know that they’re doing well and that you recognize it. So that’s something I’m kind of working on.

**Personal**

Based on what you’ve talked about above, the first question I have is how do you find time for everything?

Two strategies: I get up very early in the morning, and I have a fantastic staff. But also, the fact is that I don’t find time for everything. Some things fall off the edge of my plate, and I’ve decided that has to be okay — I just need to make sure that what fall off the edge aren’t the important things.

Clearly you have a love of music—and very diverse types of music. Tell us more about how your interest and appreciation of music developed.

I don’t even know how to start. I’ve been completely obsessed with music since I was a toddler. When I was four years old and my dad was going on a trip, I asked him to bring me home a sackbut (my interest in early music started at a bizarrely young age). The first thing I remember spending my own money on was a record. I wanted to play stringed instruments from the first time I heard and saw them. I don’t know — it’s almost like a sickness.
What instrument(s) do you play? Do you compose music?

I play clawhammer banjo, guitar, upright and electric bass, Irish flute, bodhran, Appalachian dulcimer, and very little piano (sorry, Mom). I’ve written a few fiddle tunes, but nothing substantial. I’m a good musician, but I’m actually not very creative at all — I’m more analytical, and I’m good at pattern recognition and I’ve got a good sense of time and a good sense of pitch. But making stuff up is a struggle for me. So I’m a better player than composer. What I love to do is accompany — playing behind a singer or playing for dancers is my favorite.

I see mention of a band on your Facebook page. Is that a current band or a fond memory?

A very fond memory. When I was at BYU I spent a couple of years in a ska band called (ahem) Swim Herschel Swim. We were very popular in Utah, believe it or not — I think there were 1,100 people at the final show I played with them. It was the most fun I’d ever had, but the combination of a working band, graduate school, a full-time job, a slowly growing writing career, and a new marriage all added up to one too many things in my life, so I finally had to quit. I do still miss it. When my kids are grown I’d love to get back into playing out — my beat-up Telecaster is still hanging on the wall next to my acoustic guitar and my banjo, and sometimes I think it looks at me reproachfully. When I lived in Reno I got to play banjo and bodhran for contradances down in Carson City with a couple of other guys, and that was loads of fun. Sometimes I get together with a guitarist from the library and a fiddler from the Art Department at lunchtime, and that’s great too.

[Ed. note: I was not familiar with all of the instruments and musical terms Rick mentioned, so I did a little research on Wikipedia. A sackbut is a medieval trombone, a bodhran is a type of Irish drum, and ska is a music genre that originated in Jamaica.]

You also seem to do a fair amount of cooking and sharing of recipes. What are your specialties? How did you learn to cook?

Cooking is what I do to relax. When I come home from work, all I usually want to do is start cooking, especially if I’ve had a bad day — it helps me think things through, and sometimes it’s especially therapeutic to chop stuff up. But also, I just love food. By no means am I a gourmet cook — I don’t know how to do anything really fancy or elaborate. I just like figuring out how to make things taste good. I also like figuring out how to make recipes both healthy and yummy; I enjoy that challenge. The test is whether or not the kids notice. If I can give them something that I secretly know is good for them, but they don’t notice or comment on it, then that’s very satisfying to me. I learned how to cook from my mom. I was the oldest of seven kids, and it was pretty much expected that all of us would learn our way around the kitchen. I think being an oldest child also tends to create something of a nurturing streak in a person - it’s very satisfying to me to prepare a meal for people I love.

Any other hobbies? Favorite authors or genres? Movies? Blogs? Social networks?

I’m a sucker for crime novels in general and noir fiction in particular. I love British farce, both in books and on TV — the first time I read a P.G. Wodehouse novel I was on an airplane and totally embarrassed myself by constantly snorting and giggling and wiping my eyes. I’m a pretty active Facebooker, and I blog (sporadically) about music at http://musicblurt.blogspot.com. Also, I’m a very active Mormon, so church is probably my biggest social network!

Anything you’d like to share about your family? Dogs, cats, other pets?

I met my wife Laura when her brother and I both got hired to work in the library at BYU; he and I became friends and he introduced us, which was probably the best thing that’s ever happened to me. She was teaching high school Spanish and English at the time.
We were married in 1990 and have three kids: Maggie (16), Bryan (14), and Tucker (10). We also have two dogs: a lab/spaniel mix named Sassy and a golden retriever named Kodi. Sassy is medium-sized and neurotic; Kodi is big and incorrigible. He broke my collarbone for me about five months ago, which I thought was very nice of him.

### Other NASIG News

**2009 Marcia Tuttle Award Project**  
Oleg Vinogradov, Marcia Tuttle International Award Winner 2009

The goal of my project is to catalog the periodical literature (journals and newspapers) published by Jewish organizations in Russia and/or about Jews in the period 1990-2009. This catalog will provide a window to the impressive array of Slavic Judaica publications, which are not easily obtainable in USA libraries. Hopefully it will map the scope of these publications and improve access to them.

During the existence of the Soviet Union there were only two periodicals concerning Jews in the whole country – the magazine *Sovetish Heimland* and the newspaper *Birobidzhaner Shtern* (in Yiddish). When the Soviet Union collapsed in the late 1980’s, tens, if not hundreds, of serials by or about Jews began to be published. They appeared in every major city in Russia, primarily in the Russian language. Often several Jewish publications appeared concurrently or consecutively in the same city. Sometimes they even have the same title, but were published by different organizations. Most of the Jewish serials in Russia disappeared when there was no more funding or when the founders emigrated from the country, but many are still being published. Most of these serials, which document the revival of Jewish life in Russia at a particular point in time, have not been studied properly until now.

I plan to search for Jewish serials published in Russia after 1990 and catalog them in the following format: title, publisher, place of publication, issuing organization, date of first (and last) issue, number of issues a year, ISBN if any, main topics covered, audience to whom it is addressed, circulation, way of distribution (free, subscription, Jewish community centers, etc.), area of distribution. I also plan to scan or photocopy the most interesting editions/issues.

The catalog will be done in two languages, English and Russian, and will have the transliteration according to the standards of the Library of Congress. It will benefit scholars studying both Jewish revival and revival of general political and social thought in Russia.

**PUB/PR Seeking New NASIGuide Authors**

Have you setup a new workflow? Interested in helping your fellow serials folks learn about FRBR? Please consider writing a *NASIGuide*!

The Publications and Public Relations Committee is looking for a few good people who want to write *NASIGuides*. Current guides and some suggested topics can be found here: [http://www.nasig.org/publications_guides.cfm](http://www.nasig.org/publications_guides.cfm). Here are a few ideas to get your creative juices flowing:

- Electronic resource workflow
- FRBR implications for serials
- Claiming workflows
- Pricing models
- COUNTER Statistics/collection usage statistics and workflow

I work at the Library of YIVO Institute for Jewish Research as a catalog/acquisitions librarian. (YIVO is the biggest American repository of the materials on East European Jewry). Before coming to the US, I worked during fourteen years at the National Library of Russia (NLR), St. Petersburg. And it is there where I am going to carry out my project. In accordance with the Russian copyright law, every publication published in Russia has to be deposited in the National Library. Therefore the NLR has the most comprehensive collection of Russian Jewish serials.
• Information to provide for a serials review

We welcome other topic ideas. Send questions and ideas to Kathryn Johns-Masten (kathryn.johnsmasten@oswego.edu) or Joseph Thomas (thomasw@ecu.edu).

Translators Resource Team Retired

The Translators Resource Team has been disbanded. The web page for this group will be removed from the NASIG site soon. The Executive Board would like to thank the Translators Resource Team for all of their work!

Admin Support TF Temporarily Suspended

The Administrative Support Task Force has been temporarily suspended. While the NASIG Executive Board feels it is important to work toward the goal of having paid administrative support for the organization, this is not currently feasible in today’s economic climate.

Committee Annual Reports

Mentoring Group

Gracemary Smulewitz (Rutgers University Libraries) and Dana Walker (University of Georgia Libraries), co-chairs Kim Maxwell, board liaison 2008/09; Jill Emery, board liaison, 2009/10

June 2009

The Mentoring Group conducted the Mentoring Program for the annual NASIG conference in June 2009. The Mentor/First Timers Reception was held at the Renaissance Asheville Hotel and was well attended. We had 38 mentees sign up for the program.

Evaluations of the program have not been gathered. Original mentoring forms were inadvertently lost during migration from the old NASIG website to the new NASIG website. Thanks to the help of members of the Electronics Communication Committee we were able to get new mentoring sign up forms posted to the NASIG website. We are in the process of constructing a new Mentoring Program evaluation form.

The Mentoring Group also received a request from the board to create a year-long mentoring program and implementation recommendations. Below is the outline of our implementation recommendations. The Mentoring Group has not acted on any of these implementation recommendations at this point in time. We plan to work with our new board liaison, Jill Emery, to move forward on these recommendations.

Implementation Recommendations

• We recommend that NASIG create a NASIG Mentoring Group on Facebook to conduct ongoing mentoring discussion and schedule discussion forums on specific topics. NASIG, perhaps the Mentoring Committee in collaboration with the Continuing Education Committee, would determine what core topics should be offered in forums and also establish the sequencing of the topics. There is currently a NASIG group on Facebook with 134 members.

• We also think ongoing, one-on-one mentoring relationships should be investigated for those members who prefer that method.

• Facebook NASIG Mentoring Group – Concept should be introduced and promoted at the Asheville Conference; Mentoring Group could be created prior to the conference to allow instruction for interested members not familiar with Facebook. (This was not done prior to the Asheville Conference, we hope to implement for the NASIG 2010 Conference.)

• One-on-one mentoring program could be implemented during mentor/mentee sign-up for Asheville conference. A separately scheduled meeting of individuals interested in ongoing mentoring might be necessary at the Asheville Conference.
conference. (This was not done prior to the Asheville Conference, we hope to implement for the NASIG 2010 Conference.)

Submitted by Dana Walker

Translators Resource Team

Team members: Shana L. McDanold, University of Pennsylvania (team coordinator); Rafal Kasprowski, Rice University; Derek Hiatt, Brigham Young University; Birdie MacLennan, University of Vermont
Board liaison: Virginia Taffurelli

May 2009

Activities

The request to translate the membership brochure was received in early December. The work is still in process as we have had difficulty getting people to work on the documents. We still seem to have more consistent volunteers to translate materials into French, and difficulty in finding volunteers to translate into Spanish.

A big thank you is owed to Birdie for stepping up and completing the draft of the French translation of the membership brochure quickly, which was recently reviewed/vetted by a native speaker and needs some follow up editing.

Draft for the Spanish translation has been received and is being formatted/finalized.

The NASIG Executive Board made the decision that due to the irregular level of activity, a formal team of translators is no longer needed. In the future, an ad hoc team will be established if anything needs to be translated.

Action Required by the Board

None at this time.

Questions for the Board

None at this time.

Recommendations to the Board

None at this time.

Respectfully submitted,
Shana L. McDanold

Other Serials/E-Resources News

CONSER Operations Meeting,
Library of Congress, April 30-May 1, 2009
Reported by Prima Casetta, Getty Research Institute

The annual two day CONSER Operations meeting was held at the Library of Congress on Thursday, April 30 and Friday, May 1, 2009. This report touches briefly on a few of the many topics covered. Fuller reports and documentation will be provided via the usual channels in the coming months.

Barbara Tillett (Library of Congress) showed several RDA examples and highlighted how they differed from AACR2. She asked for people to send interesting examples to her. A member of the audience suggested that it would be useful to include examples that show how RDA facilitates FRBR relationships.

Robert Bremer (OCLC) outlined the MARC field updates projected for August 2009 and reported on the revised duplicate detection and resolution program, which will now cover all formats (not just books, as previously). Cynthia Whitacre (OCLC) spoke about their record use policy, which describes allowable use and transfer of OCLC records. She also spoke about their successful Expert Community experiment, which has resulted in a large increase in the number of records edited by OCLC
members and in fewer requests to OCLC Quality Control.

Becky Culbertson (UC San Diego) reported on the recommendations of the Provider-Neutral E-Monograph Record Task Force and a discussion of the use of “(Online)” as a qualifier for the online versions of series followed. Most participants felt that this is not a useful qualifier and it will no longer be used in new series authority records. Documentation will be updated to reflect this decision.

Proposed coding guidelines and examples for the repeatable 260 field were discussed. The repeatable 260 field will replace 500 notes for recording the history of publication changes over the life of a serial, multipart monograph, or integrating resource. The guidelines will be updated and discussed further at the CONSER At-Large meeting at ALA in Chicago.

Valerie Bross (UCLA) spoke about UCLA’s pilot testing of the web conferencing software Elluminate. The group discussed its possible use for CONSER discussions between meetings and as a training tool. Using Elluminate, Jake Nadal (UCLA) and John Riemer (UCLA) presented a proposal to store preservation data in the 583 action note in a communal local holdings record, rather than in the bibliographic record. This would make it easier to see at a glance all the institutions that have taken preservation actions or made preservation commitments to a particular title. Participants felt there was sufficient merit to pursue the proposal with OCLC.

NISO best practices for title changes were discussed. Some of the problems of the presentation of e-journals, such as their lack of cohesive presentation online, were highlighted. Title changes and their respective ISSNs are lost when publishers lump all issues under the latest title and ISSN. Publishers and platform providers need to be educated about the importance of preserving access to the titles and ISSNs as they were originally issued. Les Hawkins will address this problem in an upcoming issue of *Serials Review*. Regina Reynolds (NSDP) and Cindy Hepfer (University at Buffalo) also have a related article forthcoming.

Regina Reynolds reported on the ISSN Network. She described their pilot program of “going green” by communicating via email with publishers. They are systematically notifying publishers of both the print and online ISSN for their titles, and asking them to include both ISSNs on both formats. They are not yet asking all publishers, especially the smaller publishers, to include the ISSN-L as they don’t want to overwhelm them at this point. The ISSN-L table is freely available online from the ISSN International Centre. Libraries are waiting for OCLC to implement ISSN-L before adding them to their records.

Renette Davis (University of Chicago) as a member of the Joint LC/PCC LCRI/RDA Task Group, having reviewed LCRIIs from AACR2 chapters 9, 12, and 13 for their inclusion (or not) in RDA, asked participants for input on a few specific LCRIIs. This led to a discussion of the appropriateness of testing RDA with or without LCRIIs. The consensus was that it is appropriate to include them and that RDA needs a set of LCRIIs to insure a uniform test.

Steven Shadle (University of Washington) and Cindy Hepfer spoke about OCLC and the Google Book Search digitization project. The book model of cloning print records to create records for digitized versions of monographs, and loading them without matching, does not work well for serials, which are cataloged according to a provider-neutral policy and must be matched against existing OCLC records. Participants discussed how CONSER catalogers should treat Google Book serials records in the short run. There are still long-term issues to be resolved regarding using OCLC and CONSER records for mass digitization projects.
Checking In
Kurt Blythe, Columns Editor

[Note: New members, please consider reporting the story of how you came to be a member of NASIG. You may submit items about yourself to Kurt Blythe at kcblythe@email.unc.edu. Please include your e-mail address.]

NASIG continues to replenish itself with new members. In fact, if any correlation may be drawn between the reporting in “Title Changes” and “Checking In,” then we can balance one retirement against thirteen new members and state emphatically that NASIG is quite healthy. In any event, our new members may state more clearly than your humble editor what brought them to our organization.

John Banionis writes that:

With the departure of Carrie Esch from Taylor & Francis in March 2009, I undertook the opportunity to represent T&F as journals sales executive for the Central United States.

As such, I’ve been attending numerous conferences in the journals world, and naturally NASIG had been high on my list. What impressed me most about the NASIG annual conference was the opportunity for a real exchange of ideas between librarians and publishers that is often not available at the larger, exhibits-oriented conferences. I am glad to be a member and look forward to contributing to the organization in the years to come.

John may be reached at:

John Banionis
Journals Sales Executive, Central Region
Taylor & Francis
325 Chestnut St, Ste 800
Philadelphia, PA 19106

Phone: (215) 625-8900, ext 315
Mobile: (215) 939-4236

Kristen Blake reports that:

In 2007, as a recent library school grad and new member of North Carolina State University’s Fellows Program, I was thrown into the world of serials and e-resources.

Luckily, the trial by fire approach didn’t scare me off and, a year later, I moved permanently to the Acquisitions Department as electronic resources librarian. As I learned more about the serials field, it became clear to me that NASIG was one of the most respected organizations focused on that type of work. Coworkers extolled the depth and breadth of the conference, as well as the friendliness and fun-loving nature of the members. I got to experience the NASIG conference for the first time this year in Asheville, and it was a great time. As the winner of the Horizon Award, I got to meet many serials luminaries and frontline serialists. I plan to continue my involvement with NASIG as a member of the [Library School Outreach Committee] and future conference attendee.

Kristen’s contact info is:

Phone: (919) 513-3354
E-mail: kristen_blake@ncsu.edu

“Although I had worked in an art museum library for over twenty years,” writes Susan Clay, “my work was mostly with monographs.” She continues:

For the past two years, however, I have been a serials associate in the University of Georgia School of Law Library. Earlier this year, my supervisor (and NASIG member), Wendy Moore, began telling me about the upcoming NASIG conference in Asheville, NC, and suggested I apply for the NASIG Conference Student Grant so I could attend; I applied for and was given the grant, in addition to a year’s membership in NASIG. The conference was a great opportunity for me to meet other people in the field
and to also get a really good idea of the current topics and issues in the serials community. I also found that the NASIG community is very enthusiastic, resourceful, and helpful. Everyone made an extra effort to make sure I felt comfortable at my first conference.

**Leigh Ann DePope** joined NASIG in 2009 when, “I started my position as serials/electronic services librarian with Salisbury University. I was previously the director of a small public library. This is the first time I am focusing in one area of library work. I am really enjoying it so far and do not miss juggling different, multiple tasks at once.”

Leigh Ann may now be found at:

Leigh Ann DePope  
Serials/Electronic Services Librarian  
Salisbury University  
1101 Camden Avenue, BL108  
Salisbury, MD  21801

Phone: (410) 677-0116  
E-mail: ladepope@salisbury.edu

**Lori Duggan** has been working with serials in some capacity since 2001:

I had heard great things about NASIG from colleagues, and finally had the opportunity to attend the annual conference for the first time in 2007 in Louisville, Kentucky. I was struck not only by the quality of this conference, but by the energy and expertise of the attendees and presenters, as well. I left the conference feeling energized and eager to contribute to the field in a meaningful way. In July 2008, I became the head of Electronic Resources Acquisitions at Indiana University and subsequently joined NASIG as a member. I once again had the opportunity to attend the annual conference this year in Asheville, and once again left re-charged and ready to apply what I had learned to my work at Indiana. Working in serials can be intricate and complex but is ultimately rewarding, and it is incredibly helpful to have an organization devoted to this multifaceted area of library work. I very much look forward to my future activities with NASIG.

Contact Lori at:

Phone: (812) 856-3184  
E-mail: lbadger@indiana.edu

**Ernie Evangelista** works as content acquisition and delivery manager at the Federal Reserve Bank of Atlanta:

While I’ve worked at the bank over thirteen years, only the last two and one-half years have been in my current position, which entails the acquisition and management of print and electronic resources. Like the experiences of many other NASIG members, our staff is shifting focus from the print to electronic medium. In implementing our strategy to promote end user self service, our library is interested in electronic serials management, electronic resource management (ERM) systems, federated and discovery layer searching and content delivery to mobile devices.

Though I was familiar with NASIG and its annual conference, this year’s meeting focused on several topics related to my 2009 projects. I took away lessons, best practices and ‘thinking points’ related to serials, collection development, end user web experience, ERM and integrated library systems and the value of the library. As a University of North Carolina at Chapel Hill library school graduate, it was a bit of a homecoming to go to Asheville for the conference. I’ve since followed up with some speakers; it was enlightening and productive and I look forward to attending many more!

Ernie’s contact info is:

Phone: (404) 498-8927  
E-mail: ernie.m.evangelista@atl.frb.org

**Kiersten Frase** joined NASIG as a winner of a student travel grant:

I’m about to start my second year of San Jose State’s MLIS program, but I’ve been working in libraries for most of the past eleven years. Much of my library experience has been in the realm of serials in academic, public, and special libraries. After working
as a serials assistant at the Wisconsin Historical Society, I attained the title of interim serials librarian after my supervisor retired. Although I was only supposed to have the position for a few months until a replacement was found, I’m still working in that capacity two years later! I work with quite an eclectic collection (with everything from genealogical journals to a newsletter for ice cream scoop collectors), which can be both enjoyable and challenging. I’m hoping to continue working in serials and am looking forward to learning more about the field through my membership with NASIG.

Stephanie Krueger has been associate director for library relations for ARTstor since January 2008, and has been urged for many years by long-term NASIG member Carol MacAdam to join, and this year it was finally possible. Stephanie has worked in the online world now for over a decade, following receipt of her M.S. in Information from the University of Michigan. She additionally holds an M.A. in Educational Technology Leadership from George Washington University. Prior to joining ARTstor, Stephanie was at DRAM, a non-profit music resource, and spent five years at JSTOR in several capacities, including as associate director for international library relations. Stephanie has traveled extensively and worked closely with grant-funding bodies to support scholarship in many countries, including the Russian Federation and India. Before selecting non-profit initiatives as her area of focus, Stephanie worked in the online media industry, where she designed several high-profile websites for automotive and media partners in the United States and Germany.

Chris LeBeau recently joined NASIG, and is not sure why it took so long to do so:

I was coordinator of Electronic Services for many years at Creighton University, but in 2002 I followed my spouse to a new city and my librarianship took a new focus. I accepted a uniquely crafted joint appointment between the University of Missouri’s School of Information Science & Learning Technologies, where I am on the faculty as an assistant teaching professor, and the University of Missouri-Kansas City, where I am a practitioner and business librarian serving the Henry Bloch School of Business and Public Administration. It’s challenging work with long hours, but I enjoy it. My teaching position affords me the opportunity to explore many facets of the library world, and I have continued my interest in electronic resources. I developed the course in our library program devoted to the management of electronic resources, and to support this I follow the work of NASIG closely, but this year instead of just following NASIG, I decided to join!

Michael Matthews “became head of Serials/Media/ILL because of a retirement in our library. I don’t know anything about serials management at all, period. I look forward to announcing my ignorance in an open forum so that fellow serials librarians will rush to my aid.”

Rush to Michael’s aid at:

Michael Matthews
Information Literacy/Online Learning Services Librarian
Northwestern State University of Louisiana
Watson Memorial Library, Room 108-F
Natchitoches, LA  71497

Phone: (318) 357-4346
E-mail: matthewsm@nsula.edu

Mary Fran Prottsman, MLn, AHIP, the newly appointed associate director for collection resources at the University of Southern California Norris Medical Library learned of NASIG from her predecessor, Maggie Wineburgh-Freed, an active NASIG member for many years. Mary Fran worked on the east coast for most of her career, beginning as the serials librarian at the University of Arkansas Medical Sciences Campus (UAMSC) in Little Rock, and moving on to positions as director of the U.S. Army Aeromedical Center Library in Fort Rucker, Alabama, and information specialist with the Department of Veterans Affairs Central Office in Washington, D.C. Mary Fran and her husband, Ron, moved to California last year, attracted by the climate and proximity to their children. They enjoy eating, traveling, tennis, and reading mysteries.

Mary Fran has been an active member of the Medical Library Association (MLA), chairing national...
committees, making lifelong friends, and learning much from her colleagues. She is looking forward to similar experiences with NASIG as we all grapple with issues which impact on our ability to provide our clients with optimal service.

“I get a lot of mileage of out my junior high career test story where the sole resulting career, to my horror, was librarian,” writes Angela Rathmel. She goes on:

But as it turns out, I love working in libraries, especially in technical services where I have been for the past nine years. Having heard about NASIG from colleagues and as my work has increasingly involved serials and electronic resources, I joined NASIG as a student member this year. I then applied and was awarded a student grant to attend the 2009 NASIG conference in Asheville. I enjoyed meeting many like-minded professionals and gained a lot from the sessions I attended. I will complete my MLS in December and hope to become more involved in NASIG as I pursue opportunities in the serials profession.

“I was born and grew up in Leningrad, U.S.S.R.,” writes Oleg Vinogradov:

I graduated from the Leningrad State University, majoring in Romance Philology and worked for some time as an interpreter and foreign languages instructor. In 1984, I joined the Saltykov-Schedrin Public Library (at present, the National Library of Russia), where I cataloged foreign scholarly magazines in the Foreign Periodicals Acquisitions and Exchange Department. While working in the NLR (which has much more in common with the Library of Congress than with American public libraries), I earned my MLS.

I worked at the NLR until 1998, at which time I came to the U.S. to study for my PhD in Jewish History at the Graduate Center of CUNY. While studying at CUNY, I began working at the library of the YIVO Institute for Jewish Research. At first, my work took the form of curriculum-related practical training, and then YIVO sponsored me for a working visa and later for a green card. I continue to work at YIVO as a catalog/acquisitions librarian, both for serials and books.

Though I have been working with serials many years, I only learned of NASIG this February when my wife, Alla Markova, entered the MLIS program at St. John’s and learned of various professional organizations. It was then that I applied for the Marcia Tuttle International Award and I am thrilled that I was chosen as [this year’s recipient]. I will work on my project this summer, cataloging Jewish periodicals using the collection of the National Library of Russia.* I will be more than happy to inform my former colleagues at NLR about NASIG and the wonderful possibilities it provides for librarians cataloging American magazines.

* [Ed. note: Read more about Oleg’s Marcia Tuttle Award project elsewhere in this issue.]

Citations: Required Reading by NASIG Members
Kurt Blythe, Columns Editor

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

This quarter’s introduction will be short and sweet (with “sweet” being subjective, of course). Thanks to the authors of the below-noted works for engaging with ideas and then making the result of their labor available to us, their friends and colleagues in NASIG.


Barbara Pope, review of Marketing Today’s Academic Library: A Bold New Approach to Communication with Students, by Brian Mathews, ARBAonline.

Christopher H. Walker and Ann Copeland, “The Eye Prophetic: Julia Pettee,” Libraries & the Cultural Record

Title Changes
Kurt Blythe, Columns Editor

[Note: Please report promotions, awards, new degrees, new positions, and other significant professional milestones. You may submit items about yourself or other members to Kurt Blythe at kcblythe@email.unc.edu. 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 retirement and three title changes this quarter, in addition to what might be considered an extracurricular title change, which I hope will serve as a lesson to the readers that “Title Changes” is a broadly-conceived column: Please, send me all pertinent work-related changes, not just those that occur “on the clock.”

Effective February 2009, Steve Black was promoted to the rank of full professor at the College of Saint Rose. To that, Steve adds, “I’ve been Library Journal’s magazine reviewer since March 2008, which includes writing each May 1 issue’s ‘Best New Magazines of the Year’ column, and my ‘Periodical Radio’ series of interviews with editors has thirty-three installments as of June 2009, all available as MP3 files and transcripts at http://communications.strose.edu/Radio-PeriodicalRadio.htm.”

In other periodicals news, Michael and Lisa Blackwell have taken over—with volume 9, issue 1 (2009)—editing responsibilities for the Journal of Hospital Librarianship’s “Reviews” column. Having known Lisa as a regular contributor to the column, Carol Gilbert, the journal’s editor, asked her to take over the column when the previous editor left. Lisa is responsible for soliciting review copies and reviewers and Michael, Regional Branch Manager for the Columbus Metropolitan Libraries, is the copy editor. According to Lisa, “We’ve been having a lot of fun with this project and currently have about seventy-five volunteer reviewers (some of whom are members of NASIG).”

Abigail Bordeaux returned to academia in December as a Harvard University systems librarian working mainly on ERM implementation. Formerly, Abigail was the Verde/SFX implementation team leader at Ex Libris Group.

Chris Brady recently relocated back to his hometown of Washington, D.C., and is now working at the Justice Department as a cataloging librarian. Chris writes that, “While I leave Baylor behind, I take with me great memories and experiences. But now I am much closer to family and was fortunate to land in another good workplace.”

Chris may be reached at:

U.S. Department of Justice Libraries
601 D Street, NW, Room 10200
Washington, D.C. 20540

And, last but certainly not least, Steve Murden has officially retired. In Steve’s own words:

After working part-time on a theatre archives for the last four years the money ran out, so I’m now doing the remainder of the work as a volunteer. The library—at the Virginia Museum of Fine Arts Library—is also planning for a move into a new multi-million dollar museum addition. We’ll be classifying the serials collection (heretofore organized alphabetically) and I will be helping with that process, too. And yes, I do plan to attend NASIG in Palm Springs next year.
[Please submit announcements for upcoming meetings, conferences, workshops and other events of interest to your NASIG colleagues to Lillian DeBlois, lillian.deblois@gmail.com.]

**May 4-29, 2009**  
*Association for Library Collections & Technical Services (ALCTS)*  
Web Course  
“Collection Development & Management”  
http://www.ala.org/ala/mgrps/divs/alcts/confevents/upcoming/webcourse/focollection.cfm

**May 6, 2009**  
*National Information Standards Organization (NISO)*  
NISO/COUNTER Webinar  
“COUNTER: A How-to Guide”  

**May 13, 2009**  
*National Information Standards Organization (NISO)*  
NISO/COUNTER Webinar  
“Usage Issues”  
http://www.niso.org/news/events/2009/usage09

**May 13-14, 2009**  
*Association for Library Collections & Technical Services (ALCTS)*  
“Metadata and Digital Library Development”  
Harrisonburg, VA  
http://www.ala.org/ala/mgrps/divs/alcts/confevents/upcoming/workshop/meta_digital.cfm

**May 15-20, 2009**  
*Medical Library Association (MLA)*  
Annual Conference  
“Infusions”  
Honolulu, HI  
http://www.mlanet.org/am/

**May 27-29, 2009**  
*Society for Scholarly Publishing (SSP)*  
31st Annual Meeting  
Baltimore, MD  
https://www.sspnet.org/Events/spage.aspx

**June 1, 2009**  
*National Information Standards Organization (NISO)*  
NISO Forum  
“Performance Measures and Assessment”  

**June 1-26, 2009**  
*Association for Library Collections & Technical Services (ALCTS)*  
Web Course  
“Fundamentals of Acquisitions”  
http://www.ala.org/ala/mgrps/divs/alcts/confevents/upcoming/webcourse/foacquisitions.cfm

**June 3, 2009**  
*NASIG*  
Executive Board Meeting  
Asheville, NC

**June 4-7, 2009**  
*NASIG*  
Annual Conference  
“Riding the Rapids through a Mountain of Change”  
Asheville, NC  
http://www.nasig.org/activities_calendar.cfm?action=d etail&rec=43&viewas=39967

**June 8-July 3, 2009**  
*Association for Library Collections & Technical Services (ALCTS)*  
Web Course  
“Electronic Resources & Acquisitions”  
http://www.ala.org/ala/mgrps/divs/alcts/confevents/upcoming/webcourse/foelecronic.cfm
June 10, 2009  
*National Information Standards Organization (NISO)*  
Webinar  
“Library Systems & Interoperability: Breaking Down Silos”  

June 14-17, 2009  
*Special Libraries Association (SLA)*  
Annual Conference & Info Expo  
Washington, DC  
http://www.sla.org/content/Events/conference/ac2009/index.cfm

July 9-15, 2009  
*American Library Association (ALA)*  
Annual Conference  
Chicago, IL  
http://ala.org/ala/conferencesevents/upcoming/annual/index.cfm

August 23-27, 2009  
*International Federation of Library Associations and Institutions (IFLA)*  
“Libraries Create Futures: Building on Cultural Heritage”  
Milan, Italy  
http://www.ifla.org/annual-conference/ifla75/

August 27, 2009  
*Society for Scholarly Publishing (SSP)*  
“New Markets for E-Content”  
Web Seminar  
https://www.sspnet.org/Events/spage.aspx

September 14 – October 9, 2009  
October 19 – November 13, 2009  
*Association for Library Collections & Technical Services (ALCTS)*  
Fundamentals of Electronic Resources and Acquisitions  
Web Course  
http://www.ala.org/ala/mgrps/divs/alcts/conevents/upcoming/webcourse/index.cfm

September 21 – October 16, 2009  
October 26, November 20, 2009  
*Association for Library Collections & Technical Services (ALCTS)*  
“Fundamentals of Collection Development and Management”  
Web Course  
http://www.ala.org/ala/mgrps/divs/alcts/conevents/upcoming/webcourse/index.cfm

September 23-25, 2009  
*Society for Scholarly Publishing (SSP)*  
“IN” Meeting – “Interact, Inspire, Innovate”  
Providence, Rhode Island  
https://www.sspnet.org/Events/spage.aspx

October 2, 2009  
*NASIG Executive Board*  
Fall Board Meeting  
Palm Springs, California

October 5 – 30, 2009  
*Association for Library Collections & Technical Services (ALCTS)*  
Web Course  
“Fundamentals of Acquisitions”  
http://www.ala.org/ala/mgrps/divs/alcts/conevents/upcoming/webcourse/index.cfm

October 8-9, 2009  
*National Information Standards Organization (NISO)*  
Forum and Annual Meeting  
“Library Resource Management Systems”  
Boston, Massachusetts  

October 14, 2009  
*National Information Standards Organization (NISO)*  
Webinar  
“Bibliographic Control Alphabet Soup: AACR to RDA and Evolution or MARC”  
November 4 – 7, 2009
Charleston Conference in Book and Serial Acquisitions
29th Annual Preconferences and Conference
Charleston, South Carolina
http://www.katina.info/conference/

November 10-11, 2009
Society for Scholarly Publishing (SSP)
Fall Seminars
Washington, DC
https://www.sspnet.org/Events/spage.aspx

November 11, 2009
National Information Standards Organization (NISO)
Webinar
“Data, Data Everywhere: Migration and System Population Practices”

December 9, 2009
National Information Standards Organization (NISO)
Webinar
“ONIX for Publication Licenses: Adding Structure to Legalese”
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