PRESIDENT’S CORNER
Jill Emery, NASIG President

WHAT’S HOT
It was hot in Phoenix in June and most of us liked it, thanks to an amazing venue, wonderful conference planners, and fantastic conference program planning. It’s currently hovering around 100 degrees Fahrenheit in Austin, and I can tell you it’s not nearly as much fun as Phoenix was. Each year, NASIG’s Program Planning and Conference Planning Committee members outdo themselves, and while I don’t expect the weather temperatures to be as high in Asheville, North Carolina, next June, I’m already convinced that the conference and program planning will be equally impressive! The current conference theme for 2009 is “Riding the Rapids through a Mountain of Change,” which is certainly how I feel on any given day at work. Keep your eyes out for the upcoming calls for presentation topics as the Program Planning Committee begins to set about putting together more great programming.

This past year, we experimented with organizational sponsorships for the annual conference and as it turns out, it is a good thing we did. Twelve thousand dollars came in from our limited and focused sponsorship drive and this funding resulted in NASIG maintaining a profit balance of $4K on the conference overall. Given these results, the board is convinced that organizational sponsorships should be further
developed this next year. The duty of conducting the organizational sponsorship drive for the 2009 conference has been given to Char Simser. As past president, she has both the working knowledge of NASIG and a broader understanding of the organizations that may be willing to help us out with the conference. A list of close to sixty possible sponsors from North Carolina, the publishing realm, libraryland in general, and the vendor community has been identified and will be targeted for this year’s sponsorship drive. Knowing Char, this is sure to be a successful endeavor!

**WHAT'S NEW**

There are a few new task forces at work this year. One task force, the Administrative Support Task Force, is being chaired by Katy Ginanni and is currently hard at work identifying tasks an administrative support person would do for the management of various NASIG duties in the future. This group is working very diligently and we expect to see exciting times ahead as they continue to develop this position. The other task force is looking at reimbursement costs for speakers and examining the equity of cost structures currently in place for strategy and tactics session speakers. This past year with the change to conference programming to have few sessions repeat, more speakers received reimbursements of one form or another. Dan Tonkery is leading a small focused group through various analyses of the current cost structures in place, and this group should have a recommendation to the board for speaker reimbursement changes before the fall board meeting. Lastly, we’re beginning the planning for putting together a 25th Anniversary Task Force to focus on events and a potential publication on NASIG’s history for the 2010 conference. All in all, there are a number of members doing lots of additional work to help maintain the momentum created by Denise Novak and Char Simser and I look forward to seeing what happens next!

The Financial Development Committee has been reformed and will be chaired by Denise Novak. This group is also getting to work identifying tasks to be accomplished and defining short-term goals that are more manageable within the scope of any year. Again, this is a dedicated group who will provide us with a firmer platform for financial stability, work that was begun by former NASIG President Steve Savage.

The Electronic Communications Committee has done an amazing job with the management of the new discussion lists set-up and the further development of the content management system for the website. All members of ECC are to be commended, especially the chairs, Dalene Hawthorne and Jia Mi, for all their hard work. I’m constantly hearing praise for the new site and for a relatively smooth transition, which isn’t the easiest thing to accomplish in today’s technological age.

For those NASIG members on Facebook and LinkedIn, NASIG has been added as a group and everyone is encouraged to join in adding themselves to both groups.

**WHAT'S COMING UP**

Currently, I’m in transit to meet Joyce Tenney and Rick Anderson to view some possible venues for the 2010 conference. We’re excited by the proposals we’ve received and look forward to bringing our 2010 conference proposal to the NASIG Board at the fall board meeting. Joyce has helped make our jobs easier and more concise by drafting site evaluation forms that are already proving to be useful for gathering all the various evaluation points we look at during a site visit. Once we’ve finalized these evaluation forms, we’ll post a blank one to the forms area on the NASIG website for future venues to use and for the membership to see as well.

Speaking of the fall board meeting, it will be early this year. We’ll be holding it 16-18 September so as not to conflict with peak fall foliage viewing in Asheville. This pushes some scheduled items up earlier, such as committee budgets and reports to the board. Many board members are experimenting with different means of transportation to Asheville. Some of us will fly directly into Asheville, some will drive in, and some of us are flying into Charlotte and renting a minivan. I hope to have a report for the next NASIG Newsletter about how all our various transportation experiments work out. Given the early fall board meeting, the board’s conference call that is normally held in August will be moved to November to help make sure we’ve got everything on track for the Midwinter board meeting at the University of Denver. Many, many thanks to our NASIG colleagues at the University of Denver who have been instrumental in helping us make these arrangements. At this point, I’m really looking
I welcome feedback on any of the topics discussed here or any other NASIG business you’d like to discuss!

Lastly, I really hope NASIG members will be in touch with me throughout this next year. I can be reached most readily at: jill.emerytx@gmail.com

forward to Denver in January given the weather report showing another week of 100+ temperatures in Austin!

NASIG Executive Board Minutes

Joyce Tenney, NASIG Secretary

Date, Time: June 4, 2008, 8:36 a.m.-4:45 p.m.
Place: Tapatio Cliffs, Phoenix, Arizona

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

Members-At-Large:
Rick Anderson
Anna Creech
Kim Maxwell
Alison Roth
Bob Schatz
Jeff Slagell

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

Guests:
Cory Tucker, Co-Chair, 2008 Conference Planning Committee
Sandra Wiles, Co-Chair, 2008 Conference Planning Committee
Erika Ripley, Co-Chair, 2008 Program Planning Committee
Sarah George Wessel, Co-Chair, 2008 Program Planning Committee, Incoming Member-At-Large
Bob Boissy, Incoming Member-At-Large
Virginia Taffurelli, Incoming Member-At-Large

1.0 Welcome (Simser)

Simser called the meeting to order at 8:36 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 action items since January meeting.

2/12/08 Minutes of the January 2008 NASIG Executive Board were approved.
2/19/08 Board approves the CEC request to $500.00 support for the NETSL meeting.

2.2 Action items from January meeting

Tenney requested that everyone review the action items and let her know if there are any updates. Also, please review the contact information on the board roster list and send any updates.

Simser reminded all board members to review the NASIG working calendar and send any updates to the secretary.

3.0 Treasurer’s report (Whiting)

3.1 Report

Whiting reported the following: Memberships continue to be processed with the Database & Directory Committee. As of May 22, 2008 we have 733 memberships. Donations have been down because people could only write checks for renewals during the transition to the new website. They tend to only pay for their NASIG membership if they have to write a check. ArcStone uses Chase Paymentech for processing credit card. The credit card charges and fees have gone up. Chase Paymentech has agreed to lower the percent rate for both Visa and MasterCard.
**ACTION ITEM:** Whiting will work with ArcStone over the summer to get our credit card processing fees reduced.

We are insured and bonded. Duncan Directors & Officers 2/28/08 to 2/28/09 and Cliff Davis 3/4/08 to 3/4/09.


3.2 2008 budget and expenditures to date

Whiting reported that the budget looks good. NASIG is in sound financial standing. Whiting noted that he will be working closely with incoming committee chairs to assist in formulating budgets for the 2009 budget year.

**4.0 Consent agenda (Simser)**

Simser explained the consent agenda process. Schatz requested that the Proceedings editors be moved off the consent agenda.

The following reports were approved as part of the consent agenda. All of the committee chairs and members were thanked for their efforts on behalf of NASIG. Committee chairs for next year are encouraged to focus on a small set of attainable priorities.


**ACTION ITEM:** All were encouraged to remind attendees to complete the online conference evaluation form. Creech suggested reminding audiences as you introduce speakers.

Emery noted that the Library School Outreach will request some money for a more formal reception for library schools. It was suggested that perhaps library schools could be approached to sponsor this reception or receptions, as an organizational sponsor.

Schatz discussed the copyright form that Taylor & Francis has presented for use in the articles for the NASIG Proceedings. After discussion Schatz will discuss the following questions with the Proceedings Editors: How does this impact institutional repositories? What version will be posted on the NASIG website?

**5.0 Program Planning (Wessel, Ripley, Emery)**

5.1 Last minute updates

Ripley and Wessel praised the hard work of the Program Planning Committee and noted the exceptional program that is slated for the 2008 conference. This year’s conference has 37 sessions with more than 85 speakers.

Conference handouts will be posted on NASIGWeb. Over one half of the handouts are already up on the site. Ripley noted that PPC was going to review procedures for preconferences over the next year.

The board thanked PPC for a great program.

5.2 Reimbursement and compensation policy for 2009

Emery discussed the proposed review of the NASIG speaker reimbursement and compensation policy. After general discussion of issues, it was agreed to try the concept of a travel stipend. It was hoped that this could simplify the process.

Anderson suggested a small group be convened over the summer to work up a proposal for this type of system.

Anderson moved to accept the proposed revisions of the policy for the 2009 conference. Maxwell seconded. There was a unanimous vote to approve the proposed revisions for the 2009 conference.

**ACTION ITEM:** Emery will appoint a task force to review the concept of a travel stipend and report at the fall board meeting.

6.0 Conference Planning (Wiles, Tucker, Anderson)

6.1 Last minute updates

Wiles and Tucker reported that the resort has been great to work with. The budget seems to be coming in as projected. They noted that the Fun Run was going to be at 6:00 a.m. Saturday morning in the West Courtyard. They reported that the hotel will do recycling of plastics.

Wiles and Tucker were thanked for all of their work and the board sent thanks to the entire CPC.

7.0 Committee reports and other business requiring discussion
7.1 CEC priorities and guidelines (Slagell/Maxwell)

Slagell requested clarification on what CEC should concentrate on for the upcoming year. It was agreed that they needed to focus on getting regional programming in process that would generate income for NASIG. Simser recommended that they use the UKSG for an outline of possible programs. NASIG members should have a reduced rate for the programs and speakers needed to be attained at a reasonable rate and be fiscally responsible in the arrangements for the meetings. It was suggested that there may be possibilities to offer preconferences at existing conferences such as North Carolina Serials Conference, or other similar meetings.

**ACTION ITEM:** Slagell will ask CEC to put out targeted calls for potential speakers and topics, and possibly use the NASIG Speakers and Consultants Directory to identify potential speakers. Slagell will ask CEC to develop the programs and try to find locations or organizations that will offer meeting rooms free or at a nominal charge.

Simser proposed a potential program she is willing to organize in Kansas that should attract interest from neighboring states and Boissy suggested the development of a program on end user marketing.

**ACTION ITEM:** Simser will submit her proposal to CEC. Slagell will relay to CEC the idea of a program on end user marketing.

7.2 Database & Directory

7.2.1 Database maintenance (Slagell)

Slagell relayed questions from D&D on what information on non-renewed NASIG members needs to be retained and the desired duration of the retention of the information. Novak suggested that once a year a snapshot of the database be preserved. Membership Development can obtain information on inactive members from this snapshot. It was agreed that there should be a three year rolling wall for the retention of this information.

**ACTION ITEM:** Slagell will ask D&D to update their manual to reflect the proposed retention plan and schedule.

**ACTION ITEM:** Schatz suggested that D&D send emails to the membership twice a year to remind members to check their NASIG contact information.

7.2.2 Membership renewals grace period (Slagell/Simser)

Simser reported on the unexpected implications of the possible grace period for renewals in the rolling membership payment cycle. After discussion, it was agreed that there would not be a grace period for renewals and that alerts would be sent out to members to remind them that their membership needs to be renewed.

**ACTION ITEM:** Slagell will ask D&D to update their manual to reflect that there will be no grace period for membership renewal, however email should be sent to notify members when it is time for their renewal. After three years the non-renewed members will be purged from the database. Sixty days before the first purge of the database, D&D should go back to the board and confirm that the purge should occur.

Whiting suggested a couple of emails throughout the year to the entire membership to remind them to check their renewal dates.

Slagell will check with D&D and see if non-renewing member information can be automatically deactivated after 60 days of non-renewal.

7.3 Electronic Communications (Creech)

7.3.1 Recommendation on listserv options (Creech)

After discussion, the board endorsed the ECC recommendation to continue the Bee.net listservs for the following year and review options and make recommendations at the January board meeting for committee communications. Simser asked that all committees be asked to experiment with the communication options on the ArcStone site and report in their board reports at the January board meeting. Maxwell suggested updating the committee report template to reflect these questions.

**ACTION ITEM:** All board liaisons will ask their committees to include the following sections in their fall and or January board report:
• What has been your experiences in using the new NASIG website?
• What suggestions do you have for developments and improvements in the website and back-end uses?
• What other technologies are you using in your committee communications, or what other technologies have you explored?
Creech will ask ECC to update the committee report template to reflect these questions.

**ACTION ITEM:** All board liaisons will ask their committees to report bugs and enhancement requests to ECC.

**ACTION ITEM:** All board liaisons will ask their committees to review what is on the old Bee.net site and look at what should be archived and what can be deleted.

Simser noted that the old NASIG-L will be going away, so blast emails, blogs and forums will be taking the place of NASIG-L communications. She asked that Creech review training needed to get chairs and committees comfortable with the administrative functions of the new website.

Wesley asked that ECC submit an article for the NASIG Newsletter on these changes.

**ACTION ITEM:** Creech will ask ECC to submit an article to the Newsletter.

7.3.2 Technology implementation phase II

Simser discussed the report from the implementation work on the new NASIG website. Suggestions for improvements were discussed. One of the suggestions on the report was accepted, with the stipulation the costs be negotiated with ArcStone.

**ACTION ITEM:** Creech will ask ECC to work with ArcStone on the development request and have the work completed at the negotiated price.

Simser noted that ArcStone provided pricing information on blogs, but this will be reviewed later in the year. It was agreed that no-cost alternatives to ArcStone’s wikis be investigated. It was suggested that two or three committees could experiment with some of the free wiki sites and report back on their experiences. CPC was suggested as a possible test committee.

7.4 Newsletter- liaison/relationship with ALCTS Newsletter Online (Wesley)

Wesley noted that Taffurelli was the NASIG liaison to the ALCTS Newsletter Online, however now that she is on the Executive Board she will not be able to continue this role. Emery suggested moving this to the Publications/PR Committee.

**ACTION ITEM:** Anderson will ask Publications/PR to facilitate the exchange of information from NASIG to the ALCTS Newsletter Online.

Wesley reported that she had contacted the UKSG to see if they would like to exchange editorials. UKSG thought that as NASIG already receives their newsletter there would not be additional information from their group for our Newsletter.

7.6 Nominations & Elections - Nominations & Elections process - open elections (Schatz/Novak)

Schatz noted that the Bylaws Committee reviewed the NASIG Bylaws and moving to an open election process would require a bylaws change. Before the Bylaws Committee can draft specific wording for a bylaws change, they will need an outline of a process for open elections.

Novak reported that she asked Nominations & Elections Committee to review a possible open election process and they were generally favorable with the following concerns:

- How would the vetting process be maintained?
- How would the reference verification work?
- How would the balance of librarians, vendor, publishers, etc., on the board be maintained?

She noted that we would not be able to enact an open election process until the 2010 election cycle, as the bylaws change would need to be in place before the election.

After discussion it was agreed that the concept of an open election process would work for the member-at-large positions. Simser will work with Nominations & Elections Committee to develop a proposal for enacting this process.

**ACTION ITEM:** Simser will ask Nominations & Elections Committee to develop nominations
criteria for member-at-large in an open election system that does not involve extensive committee vetting. Allowing any willing member meeting set criteria to be on the primary ballot or a general election. Need to develop process for run-off elections and thresholds required to make it to a general election.

7.6 Site Selection (Emery/Simser/Tenney)

The committee has received approximately fifty proposals to review. After discussion of the pros and cons of various locations, it was agreed that the committee would concentrate on the western sites for 2010. Site Selection will review the Portland, Oregon, Las Vegas, Nevada, and Palm Springs, California, sites for possible conference locations.

8.0 Other business requiring discussion

8.1 Administrative Support Task Force (Simser)

Simser reported that the task force has been collecting job descriptions from other associations and organizations. The task force will meet at the NASIG conference and start the process of writing a draft job description. The task force has a working calendar set up and will have a follow up report later this summer.

8.2 Reduced conference rates for first-timers (Schatz)

Schatz introduced the idea of a $50.00 reduction on the conference rate for first time attendees, in hopes of attracting more attendees and new NASIG members. After discussion the idea was tabled.

8.3 Need-based scholarship proposal (Creech/Novak)

Creech and Novak discussed the proposal they developed to help supplement funding for the NASIG conference for attendees that have little or no travel funds from their institution or organization. It was noted that this would not impact the number of student grant awards given.

Tenney moved and Maxwell seconded that the concept of a need-based scholarship be accepted and that Awards & Recognitions Committee be asked to develop criteria and process for implementation. The criteria and process document would be discussed at the September board meeting.

The board voted unanimously to accept the motion.

ACTION ITEM: Award & Recognition Committee will be asked to develop criteria and process for the implementation of a needs-based scholarship program. Draft of process should be ready for discussion at the September board meeting.

8.4 Providing articles for Serials E-News (Emery)

Emery noted the need to get submissions for the UKSG Serials E-News. She suggested picking a couple of themes from the conference and asking Publications/PR to develop submissions.

ACTION ITEM: Anderson will ask Publications/PR to work with the NASIG Newsletter to obtain articles for the UKSG Serials E-News by July 15, 2008. As NASIGuides are posted announcements or articles should be sent to the UKSG by Publications/PR. Publications/PR will consult with authors of articles to verify that publishing them in the UKSG Serials E-News is acceptable to the author.

8.5 Planning for editorial responsibilities for The Serials Librarian (Anderson/Emery)

Emery and Anderson reported on meetings with Haworth Press and Taylor & Francis. Discussions are still in the very early stages, but as one half of the current yearly content of The Serials Librarian is the NASIG Proceedings, Taylor & Francis has expressed an interest in NASIG assuming editorial responsibility for the entire journal. The board discussed various possibilities should this become a reality. It was agreed that Emery and Anderson would continue discussion with the concerned groups and keep the board informed. Should this become a reality, NASIG would need to have a business plan in place to assume this role in 2010.

ACTION ITEM: Anderson will discuss ideas for dealing with NASIG assuming editorial responsibility of The Serials Librarian with Publications/PR.
As Publications/PR have assumed several new responsibilities, it was noted that PR may need to be a separate group.

6 Organizational sponsorship (Emery)

Emery discussed documentation and progress. After a discussion of the tiers and administrative procedures of the process, Emery will edit the documentation for the past president to work with for the 2009 conference. It was suggested that the library schools in the area of the 2009 conference be approached as possible sponsors for this coming year’s conference. Simser and Emery will work together to thank this year’s sponsors and develop documentation for next year.

9.0 Strategic planning - review of objectives/action items

Simser noted that the board needs to keep reviewing the spreadsheet of goals and update as they are completed. Simser will update the spreadsheet after the meeting and then Emery will assume responsibility for the spreadsheet. The board reviewed the spreadsheet and noted areas that were completed and areas that needed additional time.

Action items from the discussion are as follows:

**ACTION ITEM:** Wessel will talk with conference Discussion Group leaders to ask them to write up reports for the *NASIG Newsletter* and the discussion forums.

**ACTION ITEM:** ECC will work with committee chairs to get information for a “What’s New” quarterly email blast to the membership.

**ACTION ITEM:** Evaluation & Assessment will review the last two years’ program evaluations and let CEC and PPC know what the most popular themes and programs were.

**ACTION ITEM:** All board liaisons should work with their committees to determine if there will be new projects or if they will need extra money this year and alert board for discussion at the September board meeting. Final budget requests and approval will be done over email after the September board meeting.

**ACTION ITEM:** Boissy will work with Membership Development Committee to determine the progress on the membership brochure and work with them to move the final content to a graphic design stage for production.

**ACTION ITEM:** Wesley will ask vendors and publishers for articles for *NASIG Newsletter*.

**ACTION ITEM:** Financial Advisory Committee will review the financial plan and decide on specific goals for the coming year.

Simser and Emery noted that the updated spreadsheet of the Strategic Plan would be posted on the NASIG Website.

Simser called for any old business. None being reported, she called for new business. Schatz offered his thanks to Novak for her years of excellent service on the NASIG Executive Board. All agreed with his motion. Outgoing board members Roth and Schatz were thanked for their service over the past two years.

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

Accepted 7/11/08
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, 2008. Current assets are $326,238.91.

**Balance Sheet 7/31/2007**
(Includes unrealized gains)
As of 8/14/2008

<table>
<thead>
<tr>
<th>ASSETS</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and Bank Accounts</td>
<td></td>
</tr>
<tr>
<td>Charles Schwab-Cash</td>
<td>$32,449.87</td>
</tr>
<tr>
<td>CHECKING-264</td>
<td>$176,140.90</td>
</tr>
<tr>
<td>SAVINGS-267</td>
<td>$84,928.77</td>
</tr>
<tr>
<td>Cash</td>
<td>$0.00</td>
</tr>
<tr>
<td><strong>TOTAL Cash and Bank Accounts</strong></td>
<td><strong>$293,519.54</strong></td>
</tr>
<tr>
<td>Investments</td>
<td></td>
</tr>
<tr>
<td>Charles Schwab</td>
<td>$32,719.37</td>
</tr>
<tr>
<td><strong>TOTAL Investments</strong></td>
<td><strong>$32,719.37</strong></td>
</tr>
<tr>
<td><strong>TOTAL Cash and Bank Accounts</strong></td>
<td><strong>$293,519.54</strong></td>
</tr>
<tr>
<td><strong>TOTAL Investments</strong></td>
<td><strong>$32,719.37</strong></td>
</tr>
<tr>
<td><strong>TOTAL ASSETS</strong></td>
<td><strong>$326,238.91</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LIABILITIES &amp; EQUITY</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>LIABILITIES</td>
<td>$0.00</td>
</tr>
<tr>
<td>EQUITY</td>
<td>$326,238.91</td>
</tr>
<tr>
<td><strong>TOTAL LIABILITIES &amp; EQUITY</strong></td>
<td><strong>$326,238.91</strong></td>
</tr>
</tbody>
</table>

The 2008 budget is on track.

2008 NASIG committee budget expenditures
1/1/08 to 8/14/08

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration</td>
<td>$8,945.11</td>
</tr>
<tr>
<td>Awards &amp; Recognition</td>
<td>$11,455.76</td>
</tr>
<tr>
<td>Archives</td>
<td>$486.37</td>
</tr>
<tr>
<td>Continuing Education</td>
<td>$341.75</td>
</tr>
<tr>
<td>Conference Planning</td>
<td>$1,109.67</td>
</tr>
<tr>
<td>Electronic Communication</td>
<td>$4,600.00</td>
</tr>
<tr>
<td>Nominations &amp; Elections</td>
<td>$133.07</td>
</tr>
<tr>
<td>Program Planning</td>
<td>$719.97</td>
</tr>
<tr>
<td>Site Selection</td>
<td>$522.49</td>
</tr>
<tr>
<td>Technology</td>
<td>$17,823.75</td>
</tr>
<tr>
<td>Treasurer</td>
<td>$12,464.40</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>$58,602.34</strong></td>
</tr>
</tbody>
</table>

The NASIG Executive Board approved the NASIG budget for 2008 during its fall board meeting in Phoenix, Arizona.

**NASIG BUDGET FOR 2008**

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration</td>
<td>$34,400.00</td>
</tr>
<tr>
<td>Archives</td>
<td>$555.00</td>
</tr>
<tr>
<td>Awards &amp; Recognition</td>
<td>$18,300.00</td>
</tr>
<tr>
<td>Bylaws</td>
<td>$1,200.00</td>
</tr>
<tr>
<td>Continuing Education</td>
<td>$3,625.00</td>
</tr>
<tr>
<td>Conference Planning</td>
<td>$6,450.00</td>
</tr>
<tr>
<td>Database &amp; Directory</td>
<td>$150.00</td>
</tr>
<tr>
<td>Library School Outreach</td>
<td>$50.00</td>
</tr>
<tr>
<td>Membership Development</td>
<td>$1,850.00</td>
</tr>
<tr>
<td>Nominations &amp; Elections</td>
<td>$400.00</td>
</tr>
<tr>
<td>Newsletter</td>
<td>$579.30</td>
</tr>
<tr>
<td>Proceedings</td>
<td>$1,274.00</td>
</tr>
<tr>
<td>Publicist</td>
<td>$100.00</td>
</tr>
<tr>
<td>Publications/PR</td>
<td>$700.00</td>
</tr>
<tr>
<td>Program Planning</td>
<td>$250.00</td>
</tr>
<tr>
<td>Site Selection</td>
<td>$2,000.00</td>
</tr>
<tr>
<td>Technology</td>
<td>$20,000.00</td>
</tr>
<tr>
<td>Treasurer</td>
<td>$7,525.00</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>$99,408.30</strong></td>
</tr>
</tbody>
</table>

**2008 Phoenix conference summary**

Thankfully we received generous donations from organizations for the conference.

<table>
<thead>
<tr>
<th>INCOME</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>100 Organizational sponsorship</td>
<td>$12,000.00</td>
</tr>
<tr>
<td>80 Conference registration</td>
<td>$174,358.80</td>
</tr>
<tr>
<td>80A Preconference income</td>
<td>$13,225.00</td>
</tr>
<tr>
<td><strong>TOTAL INCOME</strong></td>
<td><strong>$199,583.80</strong></td>
</tr>
</tbody>
</table>
**NEW COMMUNICATION TOOLS FOR NASIG**

Dalene Hawthorne, ECC Co-Chair

On June 24, 2008, the Electronic Communications Committee announced the retirement of NASIG-L, our longstanding communication medium. While this is a little bit sad, it's also a sign that we're moving forward with technology and into the Web 2.0 world.

Our new website (hosted by ArcStone) provides one-way messaging capabilities, which can be used to send announcements to the NASIG membership, and discussion forums, but no email discussion lists. The discussion forums are available through the Quick Links on the NASIG home page at http://www.nasig.org/. I hope you'll find your way there and join the discussions.

If you want to send a message to all members, please send it to lists@nasig.org and the Electronic Communications Committee will post it for you. Committee chairs and NASIG Board members have the ability to send messages directly to the membership through the website. If you are a committee chair or board member and do not know how to send a message to the membership, please contact lists@nasig.org.

The Electronic Communications Committee will be developing training documentation to help future NASIG members use the website.

Job postings should continue to be sent to jobs@nasig.org.

Committees still have discussion lists available to them for their work. The discussion lists are still being supported by bee.net, our former Web host. They were converted to new discussion list software in June, and the discussion lists have different addresses. The new listserv software allows committee members to send attachments to everyone on the committee through the discussion list. This wasn’t possible with the previous software. Only committee members can send messages to the committee discussion lists, and if you are on a committee you should have been invited to join the new discussion list address. If not, please contact your committee chair. Discussion lists are set up with the format of name@list.nasig.org. So, for example, the Electronic Communications Committee discussion list is ecc@list.nasig.org. If you are unsure of the address of your discussion list, contact lists@nasig.org. We will also post the new list names on the website.

Committees also have space on the website available for their work. To access your committee space, log into the NASIG website and click on the My Membership tab. Your committees will be listed at the bottom of the My Profile page.

The Electronic Communications Committee has been charged with looking for communication alternatives to the bee.net discussion lists for committees. We are currently setting up a Google Group to use and evaluate. If anyone has any other suggestions, please send them to lists@nasig.org.
CALL FOR NOMINATIONS

Tim Hagan, Co-Chair, Nominations & Elections Committee

The Nominations & Elections Committee invites nominations for vice president/president-elect, secretary, treasurer-elect and three member-at-large positions.

If you have someone in mind who would be great for a NASIG office, including yourself, please complete the nomination form available at: http://www.nasig.org/about_elections_process.cfm. All current NASIG members are eligible except current members of the Nominations & Elections Committee.

An online form for those who wish to submit nominations anonymously should be up on the website shortly.

The deadline for nominations is October 12, 2008.

For the first time, to make the election process as effortless as possible, once nominees agree to be review, they will not be required to fill out forms with their activities. A current resume or curriculum vitae along with a position statement will be all that is needed.

For additional information about the N&E process, please see information in the NASIG Newsletter at http://nasignews.wordpress.com/2007/06/10/223-200709-nasig-nominations-elections-process-detailed/.

For information on the duties and requirements of Executive Board members, see: http://www.nasig.org/about_executive_board.cfm.

Thank you in advance for your nominations.

This year's N&E Committee members are:
Kathy Brannon, chair
Tim Hagan, co-chair
Sarah Gardner
Susan Markley
June Garner
Joe Badics
Alison Roth
Betty Landesman
Norene Allen
Char Simser, board liaison

24TH ANNUAL CONFERENCE (2009)

CPC UPDATE
Eleanor Cook and Steve Kelley, Co-Chairs

Your Conference Planning Committee is already hard at work preparing for NASIG's 2009 conference to be held in Asheville, North Carolina, June 4-7! Asheville is nestled in the beautiful mountains of western North Carolina, a fact reflected in this year's conference theme, "Riding the Rapids through a Mountain of Change." A conference logo embodying the theme has been designed and we expect to get board approval very soon. The newly refurbished Marriott Renaissance Hotel in downtown Asheville will be the main conference hotel, with the Sheraton available nearby for overflow. Conference-goers will have easy access to downtown shops, restaurants, and bars, as well as Asheville's lively art and music scenes.

One of Asheville’s biggest attractions is the Biltmore House. CPC is working with Biltmore representatives to find an affordable package in order to hold a conference event there. Keep your fingers crossed and stay tuned!

We’re working to get the conference website up as soon as possible in order to post early travel information and a link to the hotel.

Asheville, here we come!
The Program Planning Committee is getting to work on 2009, and what we hope will be another great conference. The 2009 theme is “Riding the Rapids through a Mountain of Change.” You can submit your program proposals and ideas at: http://www.surveymonkey.com/s.aspx?sm=gLDuSAnEoUWee0bttCXLgA_3d_3d.

The first round of submissions will be reviewed after September 5, 2008. Ideas submitted after that time will be considered in a second round of reviews. Look for a second call in late September for more details. The committee is particularly interested in hearing from publishers, vendors, librarians, and others about issues relating to scholarly communication, licensing, and publishing. Proposals based on both descriptive and experimental research findings are especially welcome. If you have a suggestion for a great topic or speaker, please don’t hesitate to share that information with PPC and to encourage colleagues to submit proposals.

As always, the evaluation and assessment report for the 2008 annual conference will serve as a valuable planning tool as PPC considers ideas for the program schedule, the number and types of sessions, and ways to include a broad variety of content. If you have thoughts you want to share with the committee, please contact us at prog-plan@nasig.org.

We’re looking forward to seeing your program ideas!

The 2009 Program Planning Committee (PPC) invites proposals and/or program ideas for preconference, vision, strategy, and tactics sessions. The program planners are specifically interested in hearing from publishers, vendors, librarians, and others in the field of serials and electronic resources about issues relating to scholarly communication, licensing, and publishing. Proposals based on both descriptive and experimental research findings are especially welcome.

The Program Planning Committee will review all submitted proposals for their content and timeliness, and reserves the right to combine, blend, or refocus proposals to maximize their relevance and to avoid duplication.

This call for proposals will close on September 5, 2008. Presentations must be original and not previously presented at other conferences. The Programming Planning Committee hopes to notify applicants by the end of the calendar year, but no earlier than December 1, 2008, as to the status of proposals.

Inquiries may be sent to the PPC co-chairs, Erika Ripley and Morag Boyd at: prog-plan@nasig.org. For additional details and to suggest a proposal or idea, please go to http://www.surveymonkey.com/s.aspx?sm=gLDuSAnEoUWee0bttCXLgA_3d_3d.
Welcome to the 23rd NASIG Conference!

Frieda Rosenberg takes ten upon arrival.

Check in rush hour.
Mountain view at Tapatio Cliffs.

Registration desk with CPC members.
Happy arrivals!

CPC co-chair Cory Tucker.

Group scene at the mentoring reception.
Shana McDanold and friend at mentoring reception

2008 award winners. Congrats to all!
Registration desk dine sign.

Committee chair orientation.
Poolside between meetings!

Donnice Cochenour, project manager for the NASIG website migration.
Why they call it Tapatio Cliffs.

Passin’ on that gavel. 2007/08 Prez Char Simser, 2008/09 Prez Jill Emery.

For hundreds of additional photos, search Flickr (http://www.flickr.com/) for the tag “nasig2008.”
This year’s 23rd annual NASIG Conference opened with an introduction by President Char Simser, who welcomed this year’s first-timers, delighted in the air of volunteerism among all NASIG members, and shared a bit about her recent visit to the United Kingdom Serials Group (UKSG) meeting in Devon, United Kingdom. Paul Harwood, chair of the UKSG, chose to attend this year’s NASIG Conference and took a moment to discuss his organization’s ongoing work. The UKSG’s 31st conference was held this past April, and was very successful. Seven hundred fifty delegates, including a number of NASIG members, were in attendance. UKSG’s conference included a number of very interesting and timely programs on a wide array of topics. It was his hope that the NASIG Conference would be both successful and enjoyable.

Every year, NASIG awards several student awards and scholarships. Clint Chamberlain and Patrick Carr, co-chairs of the NASIG Awards & Recognition Committee, announced this year’s award winners.

- Fritz Schwartz Serials Education Scholarship - Alena Jewel Rucker
- Horizon Award - Betsy Appleton
- Marsha Tuttle International Award - Stephanie Schmitt
- NASIG Conference Student Grant - Eugenia Beh, Barbara Birenbaum, Kathryn Machin, Jason Ronallo, Pegeen Sever, Nancy B. Thomas
- NASIG Conference Mexican Student Grant - Armando Avila-Gonzalez
- Serials Specialist Award - Marie Peterson

Sandra Wiles and Cory Tucker, Conference Planning Committee co-chairs, provided attendees with both informative trivia about Phoenix, Arizona, and additional information about the conference schedule. After the awards announcements, Sandra introduced the guest speaker, Don Dedera. Mr. Dedera, a local historian, editor, and award-winning author, treated conference-goers to a richly detailed description and history of the Arizona he knows and loves so well. He also included a great anecdote about libraries, librarians, and the expectations of bird-loving children.

Char was pleased to announce that NASIG now has organizational sponsorships; donated funds provided by EBSCO, Elsevier, Annual Reviews, Sage, Springer and Wiley supported this year’s events and activities. Further information regarding the sponsorships would be discussed during the business meeting. Drawings for conference registrations for Asheville 2009 will be held after everyone has had the opportunity to participate in the online conference evaluation/survey. Anyone wishing to contribute to the conference blog or photoshare may do so online at www.nasig.org, or may upload photos to www.flickr.com. Further details may be found on the NASIG website. Lastly, any profits from NASIG swag, available for purchase via CaféPress, will be folded into the annual awards and scholarships funds.
OPENING RECEPTION AND BANQUET
Reported by Marla Chesler

The conference opening reception and banquet was held at the Grotto Pool and Palm Terrace at the Tapitsios Cliffs Resort in Phoenix, Arizona, the evening of Thursday, June 5, 2008, from 6:00 to 10:00 p.m. The weather was a bit warm in the sun, but very pleasant in the shade. Unfortunately, at the beginning of the reception, the largest available area was in the sun and the chairs were limited. The staff of the resort quickly provided more chairs and the sun set fairly quickly, making the weather near perfect.

The food was Southwestern and included chips, salsa, and appetizers, as well as a variety of meats and vegetables.

Those who had planned ahead wore their new NASIG 2008 conference t-shirts ordered from CafePress.com. There were also many veteran attendees wearing t-shirts from past NASIG Conferences. As is typical at a NASIG Conference, the dress was very casual, with most people wearing shorts or perhaps a sun dress.

Many attendees gathered around the lovely pool and dangled their feet in the water as a way of keeping cool while enjoying the food and chatting with friends. The music, a variety of heavy metal bands, seemed a rather odd mix for the setting and if there was any dancing, it happened fairly late in the evening.

Many groups gathered, parted, and reshaped as old friends caught up and new acquaintances got to know each other better. A very pleasant evening was spent with enjoyable company in a beautiful setting; a very successful event.

PRECONFERENCES

Metadata in a Digital Age: New Models of Creation, Discovery, and Use

*Todd Carpenter,* NISO; *Renee Register,* OCLC; *Kevin Cohn,* Atypon; *Steven C. Shadle,* University of Washington; *Regina Reynolds,* US ISSN Center; *Les Hawkins,* Library of Congress; *Helen Henderson,* Ringgold; *Sri Rajan,* Swets

Reported by Valerie Bross

... And the verdict is: a clear win for NASIG. While six hours are far too short to cover the topic of metadata standards completely, this preconference delivered the kind of punch and substance that keeps us coming back to NASIG annual conferences.

First to the podium was Todd Carpenter. He set the scene for the other presenters with a brief history of NISO, beginning with Z39.1.

Second on the roster was Renee Register, who introduced attendees to the “Next Generation” Cataloging Service that OCLC is developing. The service takes ONIX metadata supplied by publishers, mines OCLC for related records and builds a hybrid MARC record that includes ONIX data and cataloger data. For libraries, the benefit is richer, more complete records; for publishers, increased sales through more accurate metadata.

Kevin Cohn presented the perspective of a publishing platform supplier, Atypon. Atypon receives feeds from publishers and transforms the data to formats needed by consumers—including booksellers, Crossref, libraries, and end users. Kevin described a trend from proprietary formats to the NLM DTD (National Library of Medicine XML document type definition). One of Kevin Cohn’s contributions to the preconference was the term “path dependence,” of which continuing use of the QWERTY keyboard is one example.

Following Kevin’s intriguing peek into the life of a platform, Steve Shadle presented a reprise of a session he had given at the UK Serials Group to publishers: “Library Cataloging Metadata, Basics for Publishers.” He introduced publishers to the environment through which libraries provide access to publishers’ materials (A-Z lists, OpenURL resolvers, library catalogs, syndication through Google); to essential serials metadata (title, ISSN) and to service problems (major changes of the citation title with no change of ISSN).
Regina Reynolds’s presentation on the ISSN was a natural follow-up to the discussion begun by Steve Shadle. Regina discussed the history of the International Standard Serial Number (ISSN); approval of SSN-2006; and implementation of the recently-approved ISSN-L, or linking ISSN. The ISSN organization is in the process of reviewing all records in the ISSN portal to retrospectively assign medium-neutral ISSNs called linking ISSNs or ISSN-Ls. These ISSN-Ls can be used to cluster serial content across variant carriers (e.g., online v. print). A few of the potential benefits of ISSN-Ls include: use in ONIX for Serials; assistance to programmers developing FRBR-ized displays; improved retrieval in OpenURL link resolvers.

Having heard about a specific data element in a serial bibliographic record, attention turned to changes overall in library descriptive metadata for serials. Les Hawkins, the CONSER coordinator, described the development process leading to the one-year-old CONSER Standard Record (CSR). A year after implementation, the CSR Monitor Task Group has reported generally positive reception to the CSR.

Of course, the world of metadata standards is much broader than descriptive metadata for serial bibliographic records. The day ended with two thought-provoking new initiatives. First, Helen Henderson described the brand-new NISO Working Group on Institutional Identifiers. The working group will be appointed by June 10, 2008, and, it is hoped, will complete a working draft by March/October 2009.

Finally, speaking for William Hoffman, Sri Rajan discussed interoperability, with a specific focus on ONIX-PL (ONIX for publications licenses). This draft standard defines core data elements for licensing, such as purchase order number, price, and fund code. Rajan concluded that though implementation of standards can be difficult, and may require organizational change, standards-based tools can be powerful.

Managing with Integrity

*Elisabeth Leonard and Hollie White, University of North Carolina, Chapel Hill*

Reported by Tonia Graves

The “Managing with Integrity” preconference, facilitated by Elisabeth Leonard and Hollie White, both doctoral students at the School of Information and Library Science at the University of North Carolina at Chapel Hill, started even before arriving in Phoenix. On May 30, 2008, preconference registrants received an email from the facilitators containing links to two online management style tests. The facilitators recommended registrants take at least one of the management style tests before the preconference. The first management style test contained 10 “ranking” questions and was based on work done by Dr. Ichak Adizes. The second management style test contained 72 “yes or no” questions and was based on the Carl Jung and Isabel Myers-Briggs typological approach to personality, [http://humanmetrics.com/cgi-win/JTypes1.htm](http://humanmetrics.com/cgi-win/JTypes1.htm). Taking at least one of the management style tests and analyzing the results before the preconference enabled the registrants to identify characteristics of their own management styles and provided them with a starting point for the preconference discussions.

The session began as a group by addressing the question: what is management and what are the characteristics of a good manager? When the registrants shared their responses, management was identified as: getting work done through other people; providing resources and training for the team; recognizing and meeting the goals of the organization; delegating; planning for future needs; listening; keeping records and being accountable. A good manager was characterized as: patient; confident; fair; a good listener; strong; organized; a problem solver; a systems thinker; a negotiator; diplomatic; knowledgeable; a coach; and a motivator.

After the brainstorming on management and the characteristics of a good manager, Elisabeth presented theories about management attitudes from the management literature. Elisabeth explained that Theory X, authoritarian management, and Theory Y, participative management, were developed in the 1960s by Douglas McGregor. A manager who embraces Theory X expects that the average person: dislikes work; must be coerced, controlled, or threatened with punishment; is unable to solve work problems; and wants to be directed and avoid responsibility. A manager who embraces
Theory Y expects that the average person: does not dislike work; sees physical and mental efforts as natural activities; feels work can be voluntary and satisfactory; and accepts responsibility.

The 1980s saw the rise of Theory Z, by W.S. Ouchi. Theory Z has roots in Japanese management and advocates a democratic management style. A manager who embraces Theory Z expects that the average person is: loyal; interested in team work and in the organization; and capable of collective decision making.

We viewed a clip from the movie "Office Space" featuring Jennifer Aniston being counseled by her manager for not having a "minimum of fifteen pieces of flair" on her uniform suspenders. In this clip the group saw a communication style that needed improvement. They also saw how important communication is to directing performance.

Since the clip illustrated that communication needs to be meaningful, the participants moved into a conversation on this topic. They focused the conversation on coaching as a means of communicating performance. Coaching was defined as a way to improve and direct performance by assisting employees to accept responsibility for their actions and to achieve and sustain better performance. A good coach gives time and interest; establishes agreed-upon goals; has standards for measuring performance; is polite; has the ability to focus on the problem not the person, and has the ability to focus on the future not the past.

The preconference was closed by discussing one of eight situations contained in the preconference folder. Each situation, while not uncommon, is one most managers and staff would prefer to avoid. In our discussion of the situation we were advised to: define the situation, gather the facts; list the guiding principles and policies for your organization; identify possible resolutions; and for each resolution, list the consequences for yourself, the organization, and the employee(s).

Heather and Elisabeth were skilled facilitators. As a team, they also alternated smoothly between the podium and the audience. Elisabeth's background in reference and Hollie's in technical services enabled them to present a knowledgeable and balanced representation of management issues. They provided realistic examples and scenarios from both departments. Preconference attendees left with a folder of valuable notes, scenarios, and a bibliography to help them begin and continue to manage with integrity.

Emerging Trends, 2.0, and Libraries

David Lee King, Topeka & Shawnee County Public Library
Reported by Betty Landesman

David Lee King began by comparing what it was like playing computer games in a text-based environment to the current interactive capabilities of Wii. He cited Wikipedia’s definition of Web 2.0 as the second generation of Internet-based services that allow people to collaborate and share information online in ways that were previously impossible. It is all about communication, conversation, participation – in short, community.

King then described eight tools, which he called the "glue of Web 2.0": RSS, RSS readers, tagging, commenting, user-supplied content, Web as platform, mashups, and friending.

RSS allows the user to subscribe to other websites that have RSS feeds, a.k.a. syndication, as well as to create content in one place but display it in another place. The content can be any type: text, photos, audio, video, etc. Examples of library uses of RSS are subject guides from the Kansas City Public Library and new book alerts from the Seattle Public Library. RSS feed readers, such as Bloglines and Google Reader, are ways to read RSS.

Tagging, or folksonomies, is a way of categorizing the Web by choosing personal keywords which are browseable and searchable. Writing comments allows users to interact with the author instead of reading an email sent to one person. King gave an example of the director of the Ann Arbor District Library posting a notice concerning their RFP for space planning, which received 29 comments.
Examples of user-supplied content are Flickr, YouTube, and Wikipedia. As King put it, “Most Web 2.0 sites feature ‘my stuff.’”

Web as platform uses Web-based software that allows people to interact rather than the previous one-directional “here is the information about my organization.” Instead of starting with the desktop, users go to a Web service and begin using it. Examples of Web services are: Google Docs; Box.net, a storage solution; and Pixenate, a photo editing service.

A mashup combines content from more than one source into a single integrated service. Library examples include: Google Maps and bookmobile stops, as well as incorporating Google Books into the library catalog.

Finally, friending involves linking to friends or contacts to share content. Examples of friending include: Facebook, MySpace, and Flickr.

King then proceeded to discuss some of the specific tools used in Web 2.0 and illustrated how they are being used in libraries.

Blogs can be used to communicate with library patrons, indicate what is new at the library, provide subject guides, current awareness, and be the basis of an internal staff newsletter, etc. The Atchison Public Library’s website is now completely blog-based.

Social networking sites allow users to share content and to share themselves. LibraryThing allows users to read a book, rate it, connect to other people who have read it, and see what else they have read. Libraries can use social networking sites to reach patrons in their space. They can use contact lists to push events and news and provide direct links to library material.

Bookmark managers, or social bookmarking, allow users to subscribe to someone else’s feed to see what the other person is viewing. They can add tags, descriptions, comments, ratings, etc. King presented one example of several libraries’ use of del.icio.us.

Wikis are websites that allow anyone to add and edit content. Library examples included Saint Joseph County Public Library’s use of wikis for its subject guides, and the Ohio University Libraries’ Biz Wiki. Wikis can be used as library staff intranet, for project management or posting committee minutes, and to allow patrons to interact with library staff.

Instant messaging provides real time communication capabilities between library staff and patrons. King described a Meebo widget page for a library OPAC – if the user’s search retrieved no hits, a window pops up saying “Can we help?”

Podcasting is a Web feed of audio to which users can subscribe. To listen, the user needs an MP3 player, RSS feed, and feed reader. Library uses include library news, book talks, oral histories, lectures, local music, author readings, and instruction/guided tours. Again, the purpose is to reach the patrons wherever they are at that particular moment. Videocasting is similar but with video instead of audio.

Finally, King illustrated with examples how libraries are using Web 2.0 tools to extend the catalog, such as allowing user-provided tags and relevance linking, “users who checked out this item also checked out …” He concluded with many excellent reasons for all of us to make time for Web 2.0 in our libraries.

The PowerPoint slides of King’s presentation can be found on his blog at http://davidleeking.com/pdf/nasig08.pdf.
catalogers to electronic resources and acquisitions librarians as well as academic society sales managers/representatives. The two presenters took turns explaining the various sections of the program.

The program began with an overview called the "New Bibliographic Universe." This was a brief, yet complete, description of what the scholarly publishing environment consists of and defined the various types of resources within the scholarly publishing arena. Regina Romano-Reynolds spent the first part of the morning defining the various aspects of "finite resources," such as monographs and successively-issued multipart and loose-leafs, versus "continuing resources," which consist of serials and integrating resources. A significant amount of time was spent answering questions and discussing the differences between a "serial" and an "integrating resource." The overview concluded with a discussion of the CIP, Cataloging in Publication, and the differences that make CIPs unavailable for serials.

The second section of the workshop focused on the current and future cataloging rules which govern serials cataloging. The discussion began by covering AACR2 and the rules for serial title changes and what constitutes major and minor title changes. The presentation then continued with a discussion of OPAC display issues and problems which make it hard for non-catalogers to understand the terminology used in OPAC displays. This section concluded with a discussion about RDA, Resource Description and Access, and included some future possibilities for serials cataloging.

The next portion of the workshop focused on MARC. A brief historical introduction of the development of MARC laid the foundation. This was followed by examples of raw MARC coding and MARC as displayed in an actual catalog record with all the fixed fields. The examples were from the Library of Congress website. The presenters went on to discuss the main MARC fields that pertain to serials cataloging. Particular attention was given to the 130, uniform title; 022, ISSN; 856, url; and the later linking fields in the 7XX range. The final topic in this portion of the presentation focused on non-MARC methods of description such as MODS, RDF, and Dublin Core.

The fourth section of the program contained a discussion about electronic resources. The presenters began by defining the difference between direct access (CD-ROM, DVD, disc) and remote access (basically Internet) for electronic resources. This section defined CONSER and discussed CONSER single records and aggregator/provider-neutral records. The presenters then gave examples of integrating resources' records with the fields visible. The attendees were able to see what one of these records looked like in a working catalog record.

The following section focused on Functional Requirements for Bibliographic Records (FRBR). Definitions of work, expression, manifestation, and item were given along with diagrams showing the inter-relatedness of the entities. Non-FRBR and FRBRized displays were then shown so that attendees would be able to see the differences and understand the concepts easily.

Section six focused on the ISSN and related standards. The scope and definition of the ISSN were given along with the historical facts about the ISSN standard and its implementation. The basic infrastructure of the ISSN centers was also explained. The new ISSN-L, or linking ISSN, was described and details of its implementation were discussed. The importance of the ISSN as the unique linking identifier for serials was stressed followed by discussions about the ONIX for serials, serial item and contribution identifier (SICI) as well as the digital object identifier (DOI) protocols.

Section seven was a humorous case study called "Serial Sam’s Excellent Serials Adventures.” The presenter proposed several scenarios designed to test the attendees’ ability to pick out not only errors in factual content, but also conceptual errors. Discussion focused on what the errors were and what the correct options should have been.

Section eight was a very detailed examination of numerous catalog examples. These examples included various types of materials such as conference proceedings, annuals, e-journals, e-books, microforms, and minor and major title changes.

The final section was a broader, encompassing look at the way librarians see and deal with
serials in the “real world.” Topics included the commitment and cost factors that librarians must consider when dealing with serials packages in “big deal” packages and normal acquisitions through their institutions and consortia. Licensing issues and rights management were briefly discussed and the complexity of managing large numbers of e-serials.

Overall, this was a very informative preconference which gave the attendees a very broad overview of the complexity and depth of the issues facing serialists in the modern serials landscape. Attendees who knew only a little bit about cataloging learned enough to talk intelligently with their catalogers back home and those who were more proficient in cataloging gained information about the complexity facing the serials specialists at their institution.

VISION SESSIONS

Next Generation Library Automation – Its Impact on the Serials Community

Marshall Breeding, Vanderbilt University
Reported by Donna Packer

Marshall Breeding is the director for Innovative Technologies and Research at Vanderbilt. His position, he gratefully acknowledged, gives him time to follow trends and think about the implications of the many changes in the serials environment and where he thinks the library world should be going.

He noted the many upheavals in the automation industry, not the least of which is the continuing consolidation of companies through mergers and acquisitions. There are simply fewer products to choose from in all areas of library automation. Another and perhaps more worrisome trend is the increased industry control by external financial investors, particularly private equity funds and venture capitalists. Yet librarians must understand that only large companies with significant capital resources can fund the kind of product development that libraries are demanding. For the smaller companies to grow, a source of capital is essential. This means that libraries must pay much more attention to company ownership when making their purchasing decisions.

Technical innovation is far below and behind what libraries expect, and the landscape of information providers is complicated. The conventional library information system is becoming steadily less able to respond to current needs. The result is a proliferation of products, for example link resolvers, federated search, and electronic resource management systems (ERMs), around the traditional ILS. As libraries have come to understand the importance of Web 2.0 and the social networking of the younger generation, they have developed blogs, wikis, and Facebook pages. Yet these efforts are not well integrated with library services; there is no interoperability with the library’s larger Web presence. We are building “2.0 silos.”

Open source is becoming a viable alternative to traditionally licensed software. Open source implies that each library ought to be making changes and improvements, and put these changes back into the open source product for others to use. We should understand that the “open source” software and “open access” journal publication movements do not really represent cost savings. They represent cost and expenditure shifting. Libraries considering an open source ILS need to be keenly aware of the “total cost of ownership,” TCO, which will likely prove roughly equal to the cost of using a proprietary commercial model. At this time it is still a risky strategy, requiring plenty of local talent to make it work. Librarians should try to look 10-15 years down the road, as hard as that may be. The big question: Is the system you choose going to be a survivor?
It seems clear that traditional ILS vendors and open source products will continue to co-exist for some time to come, and librarians should all have an interest in the success of both options. There are three major open source ILS systems in limited use today: Koha, written for libraries in New Zealand; Evergreen, created for the PINES consortium; and OPALS, built for the K-12 market and used in school districts in New York. A company has grown up around each one to help libraries successfully implement their “free” software.

Librarians interested in open source must build a business case for their decision. A philosophical case, “open source just feels better,” will not get the job done. Vaporware is just vaporware – whether open source or commercial.

It is important to remember that commercial vendors have built what librarians have asked for in their RFPs, and an RFP is usually a backward-looking document. It is not surprising that open source modules look remarkably like what they are supposed to replace. Librarians need to have built into their next generation software deep searching capabilities and the ability to search across all content. A fundamental assumption is that libraries are all now “hybrid” libraries with holdings in physical and digital formats, but their traditional ILS systems, whether open source or commercial, do not adequately reflect this.

Librarians are seeing the disintegration of library automation functionalities, e.g., separate software for link resolvers, federated search, and ERM. Libraries need a new architecture that gets away from the “module” approach; they need to explore “service-oriented architecture,” SOA. People are thinking about “comprehensive/universal resource management” but it will be two or three years before there is anything tangible to see, and probably seven years before there is a usable product. Librarians must look ahead, and demand more forward-looking answers from their vendors, whether open source or commercial.

Information Shadows: Ubiquitous Computing Serializes Everyday Things
Mike Kuniavsky, ThingM
Reported by Cynthia Porter

Mike Kuniavsky calls himself a “user experience researcher and designer.” He thinks about how technologies and people affect each other from social, economic, historical and technological perspectives; and how the technological side of that relationship can be made better, or more interesting, for the human side of it.

Kuniavsky spent over ten years doing design and research for the Web. He was the interaction designer of one of the first big search engines, HotBot. During the dotcom crash he wrote a book, Observing the User Experience: a Practitioner’s Guide to User Research. Four years ago he decided to “pause and think full time about how to apply what [he] had learned about people and the Internet to the other computers that were increasingly embedded in our lives.” Mike considered things like mobile phones, iPods, TiVos, smart refrigerators, and talking greeting cards.

Two years ago, Kuniavsky founded a company with Tod Kurt called ThingM to pursue ubiquitous computing commercially. They are a ubiquitous computing consumer electronics company. “Ubiquitous computing” was coined by the late Marc Weiser of Xerox PARC about twenty years ago. He imagined a time when computers would be woven “into the fabric of everyday life until they are indistinguishable from it.”

Kuniavsky showed a graph that illustrated Moore’s Law, which states the number of transistors that can be inexpensively placed on an integrated circuit is increasing exponentially, doubling approximately every two years. The graph illustrated the decrease in the cost of
computing power. It also represented the fact that technology is getting cheaper and smaller. He explained that when something is expensive, you are going to have one of it and it is going to have to do a wide variety of different things.

Consider the electric motor. In 1918, electric motors were expensive, so you bought one for the house and then you bought attachments for it. The motor was a general purpose tool that was adapted as needed. KitchenAid mixers are still an example: with one motor, a variety of attachments are available to perform a variety of functions. Now that motors are inexpensive, you can put one in each kitchen tool. You may end up with multiple blenders and mixers in one kitchen. Portable computers are all around us in mobile phones, cars, and robotic toys, which cost only a little more than analog toys.

After discussing ubiquitous computing, Kuniavsky described his perspective of a journal. A journal is an agreement between a publisher and subscriber; namely, that one will provide information of a certain type to the other. He used the New England Journal of Medicine that his housemate receives as an example. Kuniavsky then compared a timeshare condo to a journal. In a journal, the form and update period are fixed, and the content is variable. Similarly, in a timeshare, the form and usage period are fixed, and the occupants are variable. In both cases, what you own is the possibility of an object, rather than a specific object. Also, unlike a rental, which is a time-limited agreement that implies no rights before or after; both a journal and a timeshare represent a kind of true ownership. You have some rights to that property forever, even if—in the case of the journal—it may only mean being able to keep the paper manifestation on your shelf forever.

Kuniavsky paraphrased Bruce Sterling, who asked, "Why does everyone on the block need to own their own wheelbarrow?" The logistics of sharing everyday objects can be complex. Ubiquitous computing gives us tools to track trade and share objects much more efficiently than any previous technology. City Carshare is an example. The keychain includes a radio frequency identification (RFID) tag. You can only open the car and start the engine when you are scheduled to use the car. Another example he used was Bag, Borrow, or Steal, which is a designer purse subscription site. It works like Netflix for expensive handbags.

Mike also used the phrase “information shadow,” which is a key piece of digital, machine-readable identification, like a barcode or RFID. In some cases, the information is as important as the item. Take wine as an example. Information about wine is as important as the wine itself, for many people. Kuniavsky made a connection between what technologists are doing and what librarians can do to help the rest of the world find what the technologists are building, but not describing.

Technologists typically leave out the information management issues when talking about technologies. He was hopeful that librarians would bridge the gap between the two. Librarians are “at the forefront of integration of information shadows and representations of objects” because librarians wrangle information about entities. Serial objects need people who understand how to corral, label, and organize information shadows. The world does not know that yet, but it will, and it will be a really big problem. “The world needs shadow wranglers,” he said in conclusion, “and that’s you.”
resources hard to use. As much as we would like to teach them how to use those resources, they do not necessarily want to be taught those things. The challenge is to bring the popular features of commercial sites into library catalogs and services.

What characterizes discovery of library resources? Our information is stored in silos by format, our tools focus on tangible, purchased resources, and we force users to come to us. In addition, there are different layers for discovery of library resources—local, as in the case of a university library website; statewide or regional, such as OhioLINK; and national, as with WorldCat.

New options for improved discovery in legacy ILS systems characterize where we are now. ILS vendors have developed products to facilitate discovery—examples include Encore from III, Primo from Ex Libris, and VuFind, an open source option. WorldCat Local can work on top of a local catalog, but pulls largely from holdings in WorldCat. These tools can retrieve both book and journal content, addressing the silo problem, and provide that richness of content seen on commercial sites—faceted search, relevance ranking, jacket covers, tables of contents, tag clouds, and “Did you mean…?” functionality.

Where are libraries going? Library users will bypass the library website, and libraries are going to be forced to take their content to them. Efforts toward this end include: the “Find this Book in a Library” feature in Google Book Search; access to local link resolvers in Google Scholar; and linking to library content from Wikipedia. In an example of leveraging user participation in a way that really enhances description, the Library of Congress put a number of images on Flickr, and some of the user comments were later added to the source catalog.

Discovery happens everywhere, and libraries need to focus not only on discovery, but on how to give users what they need wherever they are. Diedrichs stressed the need to be a little more creative than libraries have been about what their responsibilities are and how they can serve users. Libraries need to take risks, experiment with things, try new interfaces until the next thing comes along, and really make a difference for their users.

STRATEGY SESSIONS, GROUP 1

Shifting Costs in the Journal Publishing World
Nawin Gupta, Informed Publishing Solutions;
Chris Beckett, Atypon Systems;
Barry Davis, Sheridan Press
Reported by Virginia A. Rumph

Nawin Gupta regards scholarly journal publishers as facilitators and supporters of research and communication. The scholarly publishing process is an endless loop starting with research formulation, creation, and expression, which circles around again to more research formulation, etc., continuing to grow and improve through time. The steps in the process have not changed, but the tools and methods used have. In an ever-changing world, journal publishing must keep pace. All of the stakeholders, from authors to librarians, have been impacted. The speakers’ agenda encompassed examining how needs, requirements and costs have shifted for publishers and service-providers, which is fostering a better understanding and dialog among stakeholders in the journal publishing business.

The total number of active, refereed, learned journals has nearly doubled to 24,000 from 1983 to 2008. These journals are produced by about 2,000 publishers. The number of articles has also doubled to 1.5 million. These figures closely parallel the growth of R&D workers in the
U.S. As readership has grown between 1983 and 2008, information is being spread more widely and more quickly. Fixed costs are up due to improved technology, staff skills, and systems; variable costs are down; total costs are up.

**Barry Davis** spoke about shifting costs in preparation and production from his experience at Sheridan Press and Dartmouth Journal Services, which produce over 2,200 scholarly, peer-reviewed journals for a wide variety of publishers. Services run from copy editing to printing, the core service. The challenge is to integrate online journal preparation with print journal manufacturing. Some tasks are the same as they were in 1983, but there are now new tasks, and those that remain have become more complex. Staff qualifications have increased, as have equipment needs. The evolution from a manufacturing company to a company adept in all journal preparation services has been dramatic.

**Chris Beckett** tackled factors that determine the costs of electronic publishing. He cautioned against relying too much on predictions of future trends. Desired capabilities of an electronic site largely determine the investment required, both initial and ongoing. Beckett quoted sources that estimate the cost as ranging from $509 for an open access bare bones site to $5,000 for aggregators such as Ingenta, to $1 million for customized builders, per year. The disparity results from differences in capability and scalability. The four main cost areas are: production, putting content into the system; marketing, customization, multimedia; discoverability, searching, alerts; and reports, COUNTER. Publishers also want management tools on their desktops. Scalability is necessary because of the exponential increase in science and technology articles, and accompanying data which is often more important that the related article. Beckett asked where journals and articles fit in this new world of data. Should we insist on a fixed “version of record,” or an evolving agglomeration of data, discussion and other relevant media? Some changes have made it easier to do what we already do, as well as making it possible to do entirely new things.

**Real ERM Implementation: Notes from the Field**

*Karl Maria Fattig, Bowdoin College; Jeanne Langendorfer, Bowling Green State University; Jeff Daniels, Grand Valley State University; Paul Moeller, University of Colorado; Toni Katz, Colby College; Ted Fons, Innovative Interfaces, Moderator*

Reported by Lynn Shay

This program was a panel of five librarians from universities and colleges that have “gone live” with an ERM system. **Ted Fons**, the moderator, had six questions for the panel: (1) describe what the staff is doing differently in terms of workflow and organizational structure; (2) describe the goal of your ERM product launch; (3) describe the role that change management played in the project; (4) describe the major challenges to your implementation and the most rewarding solutions; (5) what would you do differently if you did it again?; (6) describe what you are doing differently for your patrons with your ERM implementation.

The ERM systems used by the represented libraries were Innovative Interfaces, Serials Solutions, or a combination of these two products. However, the panel focused on the process not the system. How long an institution had been “live” and when each librarian got involved in the process ranged from Colby College, which went live in 2004 with its librarian **Toni Katz** being involved from the beginning, to the University of Colorado, which went live in 2007. Its librarian, **Paul Moeller**, now serves as chair of the ERM Committee, but he was not involved when the process started.

In response to the first question the panelists explained their different approaches to staff training and the resulting workflows. **Jeanne Langendorfer** of Bowling Green State University explained how technical services staff now work closely with ITS and public services in setting up trials and trouble shooting when there is a problem acquiring and or accessing a database. **Karl Maria Fattig** of Bowdoin College was able to implement a major staff restructuring because the ERM is a tool that enables staff to do data manipulation.

**Jeff Daniels** of Grand Valley State University summed up the goal of his library’s ERM product launch saying they consolidated resource information about access, ILL, course reserves,
and licensing on one record with that information being available to anyone in the library. The consolidation of information on one record in one place or system was a goal for all the panelists.

Toni Katz identified that the lack of data element standards as a major challenge to implementing the ERM. A very short time line for implementation was a challenge for Jeanne Langendorfer. She also echoed Toni, saying her library did not know exactly how to get records that give the information needed. One solution for these libraries was recognizing that coding was on a local level and therefore changeable. The use of test records helped at Bowling Green State University. Karl Maria Fattig spoke of the challenges/pulls on his time. Implementing a new system is often just one part of your job. Karl’s solution was to work closely with libraries in his consortium, learning from their expertise.

On the question of what they would do differently, all the panelists focused on training – who should be involved and when they should be involved. All agreed that more stakeholders - people and departments - should be included in the training.

The final discussion centered on improved or new services their libraries were able to offer, or anecdotal evidence of an impact on users because of the ERM. At Colby College the ERM generates a “Report a Problem” for databases and journals which quickly communicates problems to the person who can correct them. Paul Moeller feels that the public services librarians are using less time explaining e-journals at the University of Colorado because the ERM has made e-journal use more intuitive. Based on document delivery statistics and the increase in emailing of library materials, Jeff Daniels feels the ERM has given his users more tools for finding information. At Bowling Green State University users are now aware of license allowances and restrictions and can get to research databases within the OPAC view.

These five practitioners shared their experiences with a receptive audience. The panel provided a snapshot of the implementation process – planning, production, changes, failures, solutions – to going live. While there were problems along the way the panel agreed that it was worth the effort to become more efficient and to provide more information to the end users.

Institutional Repositories--Strategies for the Present and Future
Jean-Gabriel Bankier, Berkeley Electronic Press; Connie Foster, Western Kentucky University; Glen Wiley, Cornell University
Reported by Gene Gardner

An institutional repository brings to one place a body of scholarship of the university. Some institutional repositories respond to the high cost of publishing and some arise to accumulate the universities’ bodies of work.

The roles of an IR are to help reform scholarly communication by stimulating innovation and to serve as a tangible indicator of an institution’s quality, thus increasing its visibility, prestige and public value. Institutional repositories struggle because they fail to incent faculty who do not see them as a valuable offering and who think that IRs have a narrow content scope.

Some suggestions for beginning are to start with a task force to develop a statement of purpose and to consider the financial implication of a hosted IR or using a remote service like Top Scholar. The task force should also look into the legal regulations of the university to determine if there is any sort of conflict. The task force also needs to explore the university’s stimulus for creating an IR and methods of selecting content, and to evaluate sustainability.

Once an institution has gathered documents, the next decision is the content for the first release. Theses are a good place to start. There will be new roles for librarians both in collection management and content upload. It is important to name and publicize an institutional repository.

Institutional repositories succeed when there is focus on incenting scholars to deposit their work, faculty are given one-on-one attention, and the scope is widened to include original content.
Narda Tarfuri began the session describing the balancing act of managing a “big deal.” The big packages require libraries to manage titles they do not want while purchasing the ones they do. Tarfuri outlined the University of Scranton’s experience with SpringerLink through their consortium, PALINET. Their deal provided them with 1700 titles, caps on yearly increases to help budgeting, access to specified backfiles, archival rights that freed them to eliminate print, and a mechanism for obtaining new titles. Their usage statistics gave them specific data to help with collection development, which showed a significant increase in use, especially in unsuspected areas. They discovered changes in usage patterns, as compared to the print. Tarfuri discussed areas of concern with these packages: all or nothing packages; library budget and “deal” inflation not matching; lack of back out mechanisms; difficulty in allocating costs; lost access to titles removed; and difficulty in tracking titles. She suggested some ideas for libraries and for publishers to make these packages more flexible: non-forfeiture clauses to stop the clock; new pricing strategies; and guaranteed archival rights.

Nowella Owen provided suggestions from a publisher’s perspective. The “big deal” offers packages of titles at 10% less than the list price for most consortia, access to all Springer journal content, archival rights, and reduced pricing for any new journals. Pricing for libraries is based on subscriptions held and maintained, although they do provide a cancellation clause. Springer offers multi-year licenses. They participate in the Transfer Project and provide pricing policies to offset titles transferred out of a library’s base subscriptions. Owen suggested licensing terms, which help to govern use of these products. Predictable revenue, simplified renewal processes and better communication between the publisher, subscription agent, and library are all what the publishers would like to see from the system of “big deals.”

Rebecca Day working at EBSCO described the agent’s role in the process. They organize information transmitted between publishers, consortia and libraries, and help to populate that information. The agent can act as the single source for information about the library’s existing subscriptions and about the library itself. They can also track the pertinent information of the package for the library. Regardless of pricing models, the agent tracks information about the library. This tracking can help smooth the process of purchasing and renewing a large package. The agent can provide help in assigning value to content within the deal. When titles transfer in or out, the agent works to alert the library and to ensure access can be maintained. Agents already have the technology and systems in place for automatic population of data and many offer other products and tools which can assist libraries in tracking their own information.

The PALINET representative, Donna Wolfe, discussed the ways a consortium assists the library with the “big deal” packages. PALINET, a full service regional service provider, offers their members a number of different services. These include offering savings as a large buying group for electronic packages. Their size and negotiation expertise offer their members economy of effort and better terms due to their volume. A consortium’s service saves a library time. Central invoicing and their mediation in the management of titles moves the work from the individual libraries to the consortium. For publishers, a consortium offers new customers, or a wider range of customers, increased use of content, and predictable income. Communication travels both ways through PALINET, providing a feedback channel for both the publishers and the libraries. Consortia need immediate notification from publishers about any changes, efficiency in communication, and streamlined processes. Wolfe cited adding new or transferring titles and archival rights as challenges for the future.

The question and answer session offered a lively discussion on some of the key challenges of each presentation, including archival rights, transferring of titles in or out of packages, title level reconciliation, and budgeting.
Karen Decker began the session with a description of claiming as it has evolved over time with different formats. Claiming began with print only, followed by print with free/paid e-access, and finally e-access only. Traditional claiming procedures are often followed for the print, with different procedures used for e-content. The lack of e-access is often not noticed until it is urgently needed. This is when your agent can help by providing online subscription tools offering instant claim entry and on-demand retrieval of information. Agents could also help by sending claims to publishers and answering claim inquiries on a daily basis, with personal attention provided if the claim is urgent or complex.

Gracemary Smulewitz described claiming procedures at Rutgers University, which has twenty-six libraries and reading centers. Print serials are claimed in the traditional way, using the SirsiDynix serial controls system. Electronic resources are not claimed; instead, a reactive approach is used. When e-access fails, the publisher is called and if payment is verified access is turned on immediately. The serial controls system, however, is being considered for e-journal claiming, using three predictions. The first prediction to check on access at startup, second, to check for duplicate records one month later, and third to prompt renewal status at the end of the fiscal year.

Micheline Westfall described claiming at the University of Tennessee, Knoxville, where an evolution has occurred, starting with claiming print serials, then claiming only selectively, and now claiming again. The reasons for the switch back and forth were: binding needs, fiscal responsibility for items purchased, difficulty in distinguishing between lapsed titles and title changes, and the needs of some disciplines, for example, art and nursing. They discovered that many paid titles were not being received. On July 1, a meeting is scheduled to develop a strategy for claiming e-issues.

Following the presentation, there was a discussion of strategies and issues involved in claiming both print and e-journals.

E-journals. Some libraries have an organized check-in system for e-journals, while others check e-journals hit and miss or just in the beginning. At one library about 6% of e-journals have access problems. Issues with e-journal claiming include: 1) staff time required for claiming; 2) link resolvers showing no access, but an A-Z list showing access established; 3) access and holdings patterns not matching the license agreement; and 4) time required to get electronic access established.

Print journals. Some participants felt it is important to continue claiming print titles, since publishers can change and one may lose access to electronic content. In addition, the print titles that are kept are important and should be as complete as possible. Claiming of print serials, however, has decreased due to: 1) replacement of print by the electronic format; 2) pressure not to claim print or to limit the number of claims filed; 3) regular reviews aimed at keeping only titles that are needed; and 4) challenges to use interlibrary loan more.

STRATEGY SESSIONS, GROUP 2

When Did E-Books Become Serials?
Kim Armstrong, Center for Library Initiatives; Rick Lugg, R2 Consulting; Peter McCracken, Serials Solutions; Bob Nardini, Coutts Information Services
Reported by Glenda Griffin

A session on electronic resources explored the static nature of traditional print monographs as opposed to the serial-like aspects of electronic books. Pertinent issues including access, storage, licensing, user interactions, monetary concerns and library budgets were overviewed.
briefly by each of the four speakers followed by a discussion between the session audience and the panelists. Panelists included a librarian, an academic library market consultant, an electronic resource management vendor, and an e-book aggregator.

E-books, like e-journals, are often available by subscription and often aggregated into online collections, evoking many of the same concerns as electronic serials. Libraries typically buy a print monograph once and give it a shelf address to which it is returned after each use. E-books live online and come with platform and maintenance fees similar to e-journal collections as well as issues regarding stability and permanence in the collection. “We need assurances for archiving,” said Kim Armstrong of the Center for Library Initiatives (CLI).

Conversely, e-books retain some aspects dissimilar to serials. While discovery of electronic serial titles most often occurs through a library’s A-Z periodical list, a list of databases, or the Web, e-books are typically discovered through a library’s online public catalog. The e-book titles in the catalog are often hand-picked. One of the panelists commented that there is a strong tradition of expert selection.

Bibliographers often make selections title by title whereas e-journals commonly arrive in bundles or packages. Collections of e-books are available, but aggregation and linking are less developed than for e-serials.

New options on the horizon include the possibility of “renting” electronic titles. Additionally, libraries may be able to acquire e-titles on demand by importing MARC records from a vendor but not purchasing the title until a user clicks on the link.

Input from the audience suggested that most libraries have MARC records in their catalogs for their e-books rather than a separate listing or an A-Z finding tool. For those without MARC records, most users find the e-books through Google, abstracts, indexes, or special platforms. An audience member also observed that where e-journals do not typically drive the users to the print versions, e-books often do just that.

In the concluding minutes of the session, panelists addressed the issue of whether or not e-books act in totality more like e-journals or like print monographs. In a final analysis, Kim Armstrong stated that not all e-books are the same; both situations occur.

What They Never Told You about Vendors in Library School
Christine Stamison, Swets;
Bob Persing, University of Pennsylvania;
Chris Beckett, Atypon
Reported by Christine Freeman

This session was presented by librarian and vendor panelists who offered insights and experience to help insure that librarians get the most value from the librarian/vendor relationship. They also discussed the essential aspects and best practices for working with vendor representatives to reach the same goal.

Christine Stamison began by suggesting attendees investigate the NASIGuide, “A Beginner’s Guide to Working with Vendors.” She then went on to expose the realities of the subscription vendor world. These realities include that the representatives’ main focus is the bottom line. It is harder to make quota in today’s world. She also stated that in the past it was easier to recruit librarians to the vendor field, but that is now getting harder. Vendors are recruiting sales people from other fields.

Christine also gave pointers on how to recognize a good or bad vendor. Sometimes a new vendor may come across as a bad vendor because they are just not familiar with sales techniques. Good representatives will start to take classes to help them become better sales people. Additionally good representatives will research your institution and come to you having ideas about what your library needs.

She also reminded the audience that it is a partnership between the vendor representative and the librarian. Vendors appreciate honest feedback about products and their job performance. Stamison mentioned that vendors always need beta testers or volunteers for new products and that can be a way to strengthen your vendor relationship. In addition, Christine stated that when you do take the opportunity to ask your vendor representative for any item,
make sure you know what it is. You should also know if the product will be useful to you and not just something that is glitzy. The bottom line for having a good relationship with your vendor representative is communication. She reminded the audience that vendor representatives must have access to the people who actually make the decisions for your library. If vendor representatives have to jump through hoops to talk to the right people, it makes it harder for them to provide you with the services and products you need.

Bob Persing, a librarian from the University of Pennsylvania, spoke next. Bob said attendees should “never forget that vendors are people who want something from you.” He reminded the audience that librarianship is a very collegial profession because there is a shared purpose, and the same can be said for the relationship between librarians and vendor representatives. Persing made a point to supplement what Christine had mentioned earlier that no one really makes a lot of money selling to libraries, so all the major Type A personality sellers are in other markets. It is important to remember that working with vendors is a business deal, and not a shared goal or a friendship. You can be friendly with the representative, but always remember that it is a business relationship.

Some important things to remember when dealing with vendors are to judge them on results not personality, and on what they do, not what they give you, such as gifts or lunch, etc. You need to tell the vendors what you want. Do not be afraid; they are not mind readers.

Bob mentioned that it is important to listen when the vendors talk. They may try to get you with a “teaser rate” on deals. See what ideas they have on trying to lock in a rate for a few years. Vendors have to be able to make a little money on each deal so that they will be able to provide the support you need to maintain your product. Working with consortia will help you get your voices heard sometimes. Do not try to deal with publishers directly and cut out the subscription agent. Your subscription agency has established a relationship with the publisher which is why you pay them. Persing also mentioned that you should be honest and blunt when dealing or negotiating with vendors. If you get insulted by the vendor representative, you probably do not want to deal with them anyway. Furthermore, there are not too many trade secrets between companies, so feel free to use that as a negotiating point.

The last speaker was Chris Beckett, VP of sales and marketing for Atypon. He added that publishers’ main audiences are authors, because they want to find the best way to help them increase their revenue. This adds a challenge for vendors working with libraries. Chris stressed that you, the librarian, have to let the publishers know what you want, and what they can do to make their products better for you and your users. He mentioned that he feels more publishers should be attending conferences like NASIG and UKSG because they are a great ways for librarians and publishers to get into dialogs.

Overall the librarian and vendor panelists successfully offered insights and experiences, along with discussing the essential aspects and best practices for working with vendor representatives to help insure that librarians get the most value from these relationships.

Innovations: Where Are They Now?
Selden Durgom Lamoureux, University of North Carolina at Chapel Hill;
and Beth Bernhardt, University of North Carolina, Greensboro
Reported by Jane M. Bethel

This session provided updates on innovations designed to improve serials management. The presenters included how the innovations began, the problems each tried to solve, approaches to solving the problems, and the innovations’ level of success over time. Innovations discussed included: SPARC, the John Cox model license, LOCKSS, COUNTER, SERU, SUSHI, and the TRANSFER Project. Dividing the session into fifteen to twenty minute segments kept this presentation fresh and especially engaging, ending with a lively interactive group discussion.

Lamoureux looked back at three innovations from a decade ago: SPARC, the John Cox model license, and LOCKSS. SPARC, the Scholarly Publishing & Academic Resources Coalition, which receives support from ARL, continues to address the serials pricing crisis as a low cost competitor to expensive STM
Bernhardt then looked at more recently developing innovations. TRANSFER, new in 2006, aims to develop and implement a set of high-level guidelines and a code of conduct for publishers. When a title moves to a different publisher, TRANSFER requires that the content be “TRANSFER compliant” and data be kept in a central repository. SERU, the Shared E-Resources Understanding, initially supported by publisher and library organizations, and now sponsored by NISO, was launched in February 2008. Twenty publishers and platform providers have registered, and more libraries and publishers are encouraged to become involved. It is an alternative to licensing that points publishers and libraries back to copyright law, and acts as a companion to copyright law by articulating the consensus understanding. For example, the terms “subscription,” “subscribers,” and “patron use” need consensus understanding. In addition, the companion to copyright law describes standard confidentiality behaviors, privacy, online performance, service, and archival and perpetual access for serials management.

SUSHI, Standardized Usage Statistics Harvesting Initiative, is the automated method to manage the success of COUNTER, Counting Online Usage of Networked Electronic Resources. COUNTER created a time-consuming problem of collecting, storing, and aggregating statistics which may be relieved as vendors are building SUSHI into their ERMs. This ERM requirement in COUNTER Draft 3 of the Journals and Databases Code of Practice at niso.org is creating an international set of standards and protocols.

The final third of the session was devoted to the future. Participants divided into clusters of five to ten people and were charged to discuss “what makes you crazy.” Group discussion focused on the need for more automation, reduction of double keying, improvement of authentication methods, ability to upload licenses in an ERM, and growth of SERU to include consortial licensing. Standardization should come with e-books, e-ISBNs, and e-book knowledgebase providers. Standard icons could indicate subscription rights for patrons, standard packages of financial information, and statistical benchmark interpretation for different sized libraries. This session was well attended and well worth the time.

Is There a Future for the Traditional Subscription-Based Journal?
Robert Boissy, Springer;
Sean O’Doherty, The Berkeley Electronic Press
Reported by Dawn Stephen

Robert Boissy from Springer presented the first portion of the presentation titled “Serials Business Models.” In the legacy of subscription-based journals, institutional print subscriptions have been the gold standard. The model has changed to institutional access, such as consortial deals. As journals gain prestige and high manuscript counts, the impact has been raised rates, increased content, and a reputation for selectivity and quality. This legacy fallout has made it difficult to think flexibly with print journals and move away from traditional pricing models.

There are other factors impacting the stalling of print to electronic subscriptions. There has been 17 ½ percent higher tax in European and Asian markets, considered a high value added tax on print. Also, in 1996/1997, librarians did not have
the expertise to manage e-journals. Publishers have worked diligently to find value in the transformation to electronic formats. They recognize the need to repurpose people to support new pricing models. They have added sales staff responsible for direct sales who understand what the market wants and needs. It is still difficult to get away from the traditional subscription model. Small institutions pay less but get the same amount of content as higher paying customers. This is the value-added approach based on historical spending.

With the migration to electronic subscriptions, more institutions are looking to consortial deals. There has been a gradual shift to base deals in online formats, with optional deep discount pricing. Deep discounts are offered so that institutions can have perpetual access to all paid content. Both publishers and clients want a sustainable solution. However, consortial models are not always possible due to publisher restrictions.

Sean O’Doherty from Berkeley Electronic Press continued the presentation with “Subscription-Based Journals: The BEPress Model: A Third Way”. Sean discussed the emergence of open access models. He described “gold open access” as the model that makes articles available as soon as they are published. There are drawbacks to this model. It is not yet financially sustainable, and it may not work for research areas with less funding where authors do not have grants.

“Green open access” is a self-archiving model. Mandates for this model are growing. At PubMed Central and Harvard, all published articles must be submitted for open access archiving. PubMed may embargo access for up to one year. Harvard may apply for a waiver.

In the area of scholarly publications, publishers can provide strategic journal development, including advice to editors and offering improvements to the peer review process. They can also provide Web optimization solutions, marketing to new readers and authors, and creative business models for access and financial sustainability.

BEPress has sustained its success by offering better traditional journals, quality and credibility, and improved technology. Their Author and Reviewers’ Bank enables contributors to earn credit for submitting articles rather than paying submission fees. Their Guest Access Policy allows anyone to download any articles for free after creating an account. No BEPress subscriptions cost more than $500, and the average price increase 2003-2007 was 2% as opposed to 20% in social and applied sciences. BEPress believes that their offerings will help sustain the future of the traditional subscription-based journal.

Questions and comments from the audience included:

- Pricing makes current publishing model unsustainable because it is too expensive.
- Would publishers consider a per article pricing model rather than a per journal pricing model?
- Workforce and thereby prices could be cut if there is a commitment to radical simplicity.
- What can we do to convince our consortia to purchase the packages, including ERMs like Serials Solutions, to save all stakeholders money?
- What are the benefits, drawbacks, and challenges of consortial purchasing and new technology packages like Serials Solutions? Surveying customers was suggested.
- Single line invoicing for packages may be radical simplicity, but procurement laws prohibit this type of invoicing.
- When the idea of faculty members’ professional societies absorbing cost of subscriptions is raised, faculty responds defensively by saying, “You’re just trying to pass your money problems onto us.”
- The provost will question why the library has such a large budget if the departments are footing the bill for subscriptions.
- Can publishers consider usage statistics or lack of use in decisions to increase or not increase prices?
- Journals in which institutional faculty have published should not be cancelled, regardless of usage or lack of use.

Steve Fallon began the presentation with an overview of events in the publishing industry that have influenced the development of the big deal. He explained that smaller publishers have been losing ground as print subscriptions declined and the market changed with evolving technology. Hence, small publishers began outsourcing their sales and marketing services to companies such as Accucom, which has the means to acquire feedback from libraries and provide that information to the publishers. With this purpose in mind, Accucom launched a market survey, the results of which Fallon shared in this strategy session.

Surveying a combination of public, state, and private college and university libraries, the survey revealed that among those libraries that responded, 70% have a 5-8% fixed price increase as part of a big deal agreement. At the same time, however, 69% of responding libraries receive only a 5% or less annual budget increase. Furthermore, 66% reported an annual budget increase that is less than the fixed price increase. In general, private academic libraries fared better, presumably because of endowments. It comes as no surprise that when the price increases are higher than the incoming revenues, something has to go. According to the survey results, the majority of cancellations are print subscriptions. Fallon listed several suggestions for reducing the attrition rate, none of which was particularly new. For example, cooperative collection development has been around for decades; and if there are sources for external additional funding, libraries have probably tapped those sources already, since these spiraling price increases have been going on for years. The suggestion that was most noticeably missing was the probably heretical idea that larger publishers might actually tighten their proverbial belts.

Gary Ives spoke of the big deal experience at Texas A&M, a multi-campus system, offering distance education programs. After listing the overall advantages and disadvantages of participating in a big deal package, he revealed the results of a cost-per-use analysis. The analysis was based on a 2006 usage report and 2007 contract pricing. Interestingly, the analysis revealed an average cost-per-use of $4.43, while individual titles ranged from $.21 to $285.53. Two titles had a cost-per-use of over $100.00, and eight titles averaged over $50.00 per use. As a footnote, Ives emphasized the necessity to account for title-level costs by subject area. He also expressed a shared sense of exasperation at having to reconcile title lists on an annual basis.

This panel presentation provided examples of holdings conversion projects from different local systems and the migration of existing MARC-formatted data from one ILS to another. Steve Shadle asked each of the speakers to answer three questions: Why use MARC Format for Holdings Data (MFHD)? What were your expected benefits? What lessons did you learn?

Sion Romaine described the University of Washington’s project to convert their unformatted holdings records into MFHD. They chose MARC to automate WorldCat resource sharing, to more easily load holdings into union catalogs, to standardize their holdings statements, and to ease future system conversions.

The initial project involved converting 169,000 print and microform records. Their first step was communicating with other library departments who would be affected by the conversion -
Interlibrary Loan, other processing units, and public services. Next, they prepared documentation and identified who would do the training and the conversion work. Before conversion began, they analyzed their data, normalizing and correcting inconsistencies. About half of their records were changed using Innovative Interfaces’ create lists and global update functions. MARC Leaders, 007, 008 and 853 fields were added to the MARC format check-in records. The other half of the records was converted by hand, using students and staff. Current check-in records were priorities, as were frequently requested titles and frequently dropped requests, meaning issues were not owned.

Sion learned many lessons over the course of the project. It was essential to find people who knew MARC and to ask lots of questions. The NASIGuide on Serial Holdings was an essential resource, and fellow panelist Frieda Rosenberg was thanked profusely by all for creating the guide. He stressed the importance of preparing documentation early, converting easy records first, sending a test file to OCLC early and asking them lots of questions. Finally, learning the limits of your ILS system, your resources and your staff are important considerations.

Frieda Rosenberg detailed the University of North Carolina’s two holdings conversion projects, one from a homegrown non-MARC database to DRA Classic, and the other from DRA to III Millennium. They chose MFHD to support library standards, so their holdings displays would be consistent with their consortium partners for union listing, and to aid with future migrations.

Their first conversion went fairly smoothly. Much of the data was already coded and delimited in the BIS format, which was mapable to MFHD paired fields. Free-text note data, however, did not map well. Only one line of text displayed in the public catalog, and each record had to be edited by hand. In addition, they ran two unconnected systems, Innovative for check-in and DRA with MFHD for the OPAC. The second migration included the merging of data from both of these systems into III Millennium.

The second conversion had parts that worked well and parts that did not. The 863 holdings summaries mapped well. Their biggest problem was that the holdings data from both earlier systems was not merged and duplicate holdings information displayed in the OPAC for each title. They decided to suppress all holdings data in the OPAC while they solved the data and display issues. Using the III report utility, they were able to identify the data that needed to be merged. After normalizing data through global update, the vendor ran a program to merge the records. Frieda also detailed other display problems and how they worked to solve the issues.

The long-range problems the University of North Carolina is now facing include tailoring data to three separate interfaces: Millennium, the Endeca "skin" and OCLC WorldCat. The 866 summary that the University of North Carolina displays in Endeca is stripped off in the batchload to OCLC, so the 863-865 data needs to be maintained. They are also working to display holdings of consortium partners through notes and links so their patrons can easily find volumes that are available to them from other libraries.

The University of North Carolina has rethought and changed their coding several times. Frieda learned that it is best to concentrate on coding that will aid functionality. Be sure you know where your data is really located and keep harmony with your vendor. It is also best to use automation; macros, templates, system reports, etc., as much as possible. This saves time and also promotes consistency and ease of management.

Ted Schwitzner also described two conversion projects. The first, at North Central College, was a migration from ILLINET Online to DRA Classic. The second was from DRA Classic to Endeavor Voyager at Illinois State University. They chose to use MFHD because it is an international standard. It is portable and by using it your system can do the work of sorting and displaying holdings data to your users in a consistent manner.

Before conversion, North Central College did not display any serials holdings in their local catalog. They wanted to move to a standards-based display that would enable them to enter and maintain detailed holdings. Illinois State University also wanted more control over the display of their holdings data. Ted focused on problem holdings, “hairy data,” first. The first conversion resulted in many display problems.
853/863 pairs did not expand or compress, and 863s displayed instead of 866 summaries. OPAC displays took a long time to load; they were difficult to read, which frustrated patrons. Serials check-in was also a problem.

Illinois State University had fewer display issues in the second conversion, but they still had problems. In response to patron concerns, both libraries deleted 853/863 pairs after moving to Voyager, because they displayed along with the 866 summaries. A year later, they discovered the indicator combination that allows 866s to display and the pair to be suppressed. They then began recreating the data they had deleted.

The most important lesson that Ted learned was to know the MARC format. He focused on the importance of testing the data and testing the system. Learn what your ILS can and can not do, and document workarounds and limitations. Determine and focus on what is most important to users and staff.

Naomi Young focused on the psychological issues of a serials conversion project, rather than the technical details. She chose MARC for all the reasons the others gave, plus her library’s director of technical services co-wrote the MFHD standard. The University of Florida had MARC formatted data, then they moved to a non-MARC NOTIS catalog, and their 853/863 data was suppressed at that time. When they moved from NOTIS to ALEPH, the data was unsuppressed, but it displayed poorly. They then began converting it by hand.

To undertake a big serials conversion project, it is essential to have administrative buy-in. Your organization needs to know and support the fact that the work will take longer and be slower during the conversion. The trainer, too, has to be patient with those doing the work. Naomi plied workers with chocolate and hand-puppets to keep the workplace fun and relaxed. Be aware of different learning styles and make as many different tools as possible in a variety of ways. To find suggestions for preparing training materials geared to different types of learners do a web search on “learning styles” limited to .edu sites.

Naomi learned that bindery staff did the most conversion, therefore they should have had training first. It is important to set priorities; they worked on print, current titles and ILL problems first. Get the most resistant people working on annuals, get a macro-creation tool, and do not aim for perfection.

The common themes from all the speakers were: the more conversant you are in MFHD, the fewer problems you are likely to have. Communicate with your ILS vendor and OCLC early and often. Use automation, macros, global updates, etc., as much as possible. The project will take longer than you expect; be patient, and have a good attitude about problems.

Managing Divergence of Print and Electronic Journals
Beth West and Deena Acton, National Library of Medicine
Reported by Sharon Hybki Kerr

Beth Weston and Deena Acton presented an informative session on the trend of content divergence between print and electronic editions of serials; the role of the National Library of Medicine (NLM) as a National Library; and how that divergence is impacting the library’s collection, operations, and services.

Beth Weston began the discussion by giving a brief history of the National Library of Medicine and the interdivisional working group that NLM established to examine an increasing trend of some publishers issuing electronic-only content. The working group issued a recommendation that later led to a study, undertaken in early 2008, to compare the exact coverage of a set of print and electronic journals. Brenda Linares, an NLM associate fellow, worked with Beth and Deena to develop and implement the study.

The presenters posed five questions in analyzing the study results. The questions explored the difference between the print and electronic editions of journals and how the library needs to address these differences:

1. How are differences discovered?
2. How is information about differences recorded?
3. What are the differences and how prevalent are they?
4. How do content differences impact the ability to provide ILL services?
5. How do content differences impact NLM’s ability to maintain a complete archive?

Through these questions, they detailed the results of the study and explored the differences between print and electronic editions and the impact on library collections and services.

The study included 149 titles from the collection that met the following criteria: the titles were indexed in MEDLINE; at least one issue of the title had electronic-only content; and both print and electronic editions of the titles were currently published. The journals were primarily in English, but the sample included titles in several foreign languages. The study looked at all of the titles in the sample, specifically examining the last issue published in 2007. The same issue of each title in both print and electronic editions was checked. For each issue, data were collected on the number of articles in each issue, editorials, commentary and letters, book and media reviews, commercial ads, classified ads, announcements and calendar items, and continuing medical education materials. They shared the results of the study through a series of slides. A few of the interesting discoveries of the study included: no cases occurred where articles were included in the print edition but not included in the electronic edition; the number of electronic-only articles per issue varied from 1 to 52; and commercial advertising was the only area where substantially more content was contained in the print version than the electronic.

Although the sample size was relatively small, the results suggest the potential scope of the problem, including the impact on library collections and services. The study showed that dual publishing with divergent content is not limited to a particular segment of the publishing market or to a particular subscription model. Publishers are following a variety of models in publishing print and electronic content.

The speakers concluded by highlighting the impact of content divergence on the medical library community and NLM staff and budget. In addition, since the dual format of serials with divergent content may be with us for the foreseeable future, the overall library community needs to respond. Standards need to be developed to identify which edition is the version of record, along with continuing efforts to negotiate license terms for electronic journals that include the same interlibrary loan rights as print, and publishers and library communities working together to address these challenges.

Following the presentation, there were a number of questions from the audience, including how to work with publishers to obtain expanded interlibrary loan rights, how NLM was working with publishers, and the role of subscription agents or vendors.

**TACTICS SESSIONS, GROUP 1**

Images of Academic Librarians: How Tenure-Track Librarians Portray Themselves in the Promotion and/or Tenure Process

*June Garner and Karen Davidson, Mississippi State University*

Reported by Christine Freeman

Going through the promotion/tenure process can be a harrowing experience for librarians. Requirements for promotion/tenure can, and do, vary from institution to institution across the country. June Garner and Karen Davidson, both librarians at Mississippi State University, have attempted to take the “sting” out of preparing for the promotion/tenure process.

Two important areas that they felt were of the utmost concern for librarians preparing the promotion/tenure process include: what types of contributions are expected for successful promotion/tenure at Carnegie institutions, and what advice would already promoted/tenured librarians give to new tenure-track librarians.

In preparing this presentation, June and Karen proceeded to contact a random sample of 655 librarians from across the country by invitation letter to participate in a survey. They received 252 responses from tenure-track librarians. The largest number of respondents came from 44 libraries with a collection size of one to three million volumes. The largest geographic region represented was the Midwest, while the largest age group was the baby boomers, ages 43 to 61.
Additional information about the respondents included: the average salary fell somewhere between $50,000 to $75,000; the majority of respondents were not particularly looking for a tenure-track position; and the top five job titles were administrator, 55; reference librarian, 40; original cataloger, 21; subject bibliographer, 16; and archivist, 13; followed closely by serial/electronic type titles.

Through their survey June and Karen were able to determine that promotion/tenure requirements vary greatly from institution to institution. One thing that most institutions did have in common was the presence of a promotion/tenure committee. All respondents stated that national presence, scholarship, and service were important parts of the tenure process. Many respondents said they worked under no specific guidelines, while some respondents stated there were no benchmarks available to know how much scholarship/service was enough.

National presence can be defined as required publications or it may mean national-level service to an organization. If new librarians did not already find the requirements for national presence confusing, trying to delve into the requirements for scholarship and service is just as bad. It is important to remember that what may count as scholarship at one institution may be considered service at another.

Some examples of scholarship contributions collected from the survey included refereed articles, poster sessions, presentations, conference proceedings, Web pages, and book reviews. Exactly how many of each type of contribution required for promotion/tenure is dependent on the specific institution.

Service contributions collected from the survey included serving as a national committee chair, an officer in a professional organization, a member of university-wide or non-university committees, a member of library committees, or memberships on professional committees and in professional organizations. As with scholarship contributions, the amount of service and which areas need to be represented depend on the institution.

One of the best parts of this presentation was the advice from tenured librarians to librarians just beginning their careers. Highlights included: start writing early; make writing a regular part of your work; recognize that the position is not 9 to 5 and that scholarship takes place in the evenings and on weekends; find a mentor; and get involved in associations right away.

One thing to remember as a librarian going through the promotion/tenure process is to play up your daily duties. Librarians may not be able to publish as much as the teaching faculty, but their daily job duties help keep the library up and running, which in the opinion of the presenters can be more important than publishing a journal article.

June and Karen did a good job of lifting the veil off the promotion/tenure process for new librarians. Promotion and tenure are scary. However, with the help of this presentation, available on the NASIG website, and the articles they cited at the end of the presentation, new tenure-track librarians should be able to hit the ground running and not even feel the “sting” of the promotion and tenure process.

Simplifying Licensed Resource Access through Shibboleth

Holly Eggleston, University of California, San Diego
Reported by Virginia A. Rumph

Holly Eggleston began by reviewing our current dilemma with electronic resources. Libraries have been providing access to licensed electronic resources for at least ten years, but as more resources are provided the expenditure of time, effort, and money to troubleshoot and maintain access has grown out of control. Maintaining lists of IP ranges with vendors and managing remote access are two of the biggest headaches. Problems with remote IP access include the need for patrons to configure their machines, and remember multiple passwords, as well as the maintenance of an IP list by the library and its vendors. In an ideal world there would be integrated access regardless of location, a consistent user experience, reduced maintenance overhead, and reliable authentication for vendors. How do we get there?

The InCommon Library/Shibboleth Project was created in 2007 as a multi-institutional effort...
exploring the use of single sign-on access to library resources using Shibboleth and rewrite proxies. Eggleston defined Shibboleth as an open source standards-based Web single sign-on package. Shibboleth leverages local identity management systems, enables access to campus and external applications, protects users’ privacy, helps service partners, and plays well with others. Internal campus resources, internal library resources, and external resources can all be accessed through Shibboleth. However, library concerns with Shibboleth are communication with campus IT, privacy, walk-in users who do not have single sign-on accounts and library patron database integration. In addition, not all resources will use it and an IP is still needed for some resources.

Rewrite proxies such as EZproxy are a library-implemented solution to provide off-campus access to electronic resources inexpensively. No user configuration is needed and it can be enabled for single sign-on authentication. There are many benefits of using Shibboleth and rewrite proxies. The user only needs a single password for on-campus and remote access, and gets personalization while maintaining privacy. Librarians benefit from being able to manage IPs locally and reduce support costs. The library administration gets central usage statistics, namely, foot traffic.

UCSD implemented Shibboleth in 2005, enabling campus services such as financial, employee, and blogs; piloting electronic resources access; and investigating ILS managed services, such as ILL, and account management. What can others do? For those who have not implemented Shibboleth, consider a small-scale pilot project to Shibboleth-enable selected campus resources; for those with Shibboleth, shib-enable your proxy. Create a pilot with existing Shibboleth information providers and communicate interest in single sign-on with vendors. What are the next steps? Recommend best practices and solutions to common use cases, conduct pilots to validate approaches, encourage adoption of Shibboleth by U.S. institutions, partner with others abroad, and enable community information sharing.

E-Books Vs. Print: Which Is the Better Value?
Jonathan Bunkell, Elsevier
Reported by Amy Carlson

ScienceDirect provides three different types of electronic book collections at present: major reference works, book series and their e-book collection of monographs. Jonathan Bunkell presented research conducted by Elsevier to determine advantages and cost effectiveness of a distinct subset of electronic books that they offer. They looked at expenditures, usage statistics and access information from members of the Association of Research Libraries (ARL), the Society of College, National and University Libraries (SCONUL), and the Council of Australian University Libraries (CAUL) to assist in their value comparisons.

Their results show that electronic books are substantially more cost effective than print. Electronic books offer greater access and discoverability, and increase usage and cross linking between titles and resources. In a comparison of cost per use between a print and an e-book, where print factors include the processing and housing of the book, e-books’ cost per use appears lower and decreases over time and with uses. E-books offer greater accessibility than the print version, particularly if more than one online viewer accesses the book at a time. Off campus usage increases the overall usage for a title. Cross linking connects different online resources, offering greater contextualized information and a richer picture of where information sits within a broader discipline.

Bunkell noted the importance of putting books online on a highly accessible, familiar research platform to generate more usage. Models for pricing include usage, subscription, and perpetual access. He concluded the presentation by asking the audience, if, after experiencing the iPod, they would return to the Walkman.

Questions at the end of the session clarified some of the cost analysis factors and pricing models discussed in the presentation.
Marsha Seamans and Nancy Lewis presented their journey to provide access to e-journals through their catalog in "Taking the Sting Out of Multiple Format Serial Displays," a well-attended, standing-room-only tactics session in Phoenix. The purpose of the presentation was to highlight Voyager’s Bib Linking feature, their latest addition.

First, some history was needed: why provide access to e-resources through the catalog at all? There is a need to attach acquisition records to an item and to let users know that when a title has been cancelled in print, electronic access is still available. There is also a need to facilitate discovery of materials instead of merely cataloging what is physically held.

In the early days of e-journals, access evolved from depending on reference librarians and subject specialists to compile A-Z lists to a FileMakerPro database called EJAG. In 2001, using EJAG, they started a JSTOR experiment using a single record cataloging approach. They added an 856 tag that pointed to EJAG; a 909 tag with JSTOR, in case these all needed to be pulled out again which is always good planning in cataloging experiments, and a holdings record for the e-version.

In 2003 and 2004, vendor and batch loads were added into a separate owning library for easy deletion and/or reload if necessary. At this point, multiple records were becoming more prevalent, and JSTOR was revisited, with three distinct urls: pointing to the resource itself, to EJAG, and to off-campus proxy instructions. The multiple records' policies were dealt with on a case-by-case basis and were becoming very complicated. At this point in time CONSER’s “aggregator neutral” record policy emerged and the university firmly moved toward separate records for print and electronic serials. The next step for the University of Kentucky in e-journal access was to implement SFX. At first, it worked with EJAG. Later, it was to replace EJAG.

Following a presentation at EndUsers 2006 on the Princeton model of bib linking which provided a how-to manual, the University of Kentucky library determined that additional programming would be needed to implement bib linking with their catalog. Bib linking simplifies and streamlines the user interface for related titles, as relationships are created on the fly. The hyperlinks between records are not persistent but work as an “if, then” relationship. Every link is created as it is retrieved in a search. Quotes were obtained for the indexing necessary for the MARC fields to create these hyperlinks in both the training database as well as the live one. Indexing was also needed so users would have the ability to move between related records such as earlier and later serial titles, or parent and child records. In October 2006, a request for funds was submitted, and the additional programming was obtained.

Linking in this manner provides “seamless transport” from print to electronic records or vice versa. The experience has reportedly been a much friendlier and clearer one for the user. The on-the-fly one-way linking system is clean and uncluttered and although it required a large start-up project to get started, there is minimal regular maintenance involved. Ongoing procedures involve canceling print titles, adding subscriptions to electronic counterparts, adding standardized cancellation notes, continuing clean-up through Access reports, and storing print backfiles.

As Marsha and Nancy look to the future, they discussed the possibility of an ERM, or a next generation catalog. There will always be more clean-up and storage of backfiles, and they do intend to provide access to all e-journals through their catalog. Further details on the intricacies of bib linking can be seen in their presentation on the NASIG website.
Are libraries the same or different in the for-profit world? In their session “E-Resource Management in the For-Profit World,” presenters Sarah Morris and Steve Oberg offered a wide-ranging discussion of this question, as well as the challenges of managing serials and electronic resources in corporate libraries. Based on their own experiences at Reed Smith LLP (Sarah) and Abbott Laboratories (Steve), the presenters considered the ways in which corporate libraries also feel the sting of managing serials, user expectations, and negotiating with publishers and vendors.

Both Steve and Sarah challenged the typical assumption that corporate libraries have larger budgets. Rather, there are financial incentives for cost savings at for-profit companies. Corporate libraries have to prove a strong return on investment for their resources and services, and thus experience budget issues not unlike academic libraries. Budget issues include unfilled staff positions, the balance between print and electronic, and concerns about the rising costs of resources. Steve and Sarah also commented on how corporate libraries also deal with demands for online access and search for new ways to meet user needs.

While there are many similarities between corporate and academic libraries, the presenters noted several differences; including organization, terminology, budgeting, and staffing. For example, staff in corporate libraries often come from a variety of academic backgrounds, and frequently have librarians working with technical and subject experts. Corporate libraries have their own unique organizational structures, and may not report to a librarian. It is also not atypical to see terminology like “knowledge management” used over the more typical library jargon. Negotiating with vendors also presents different challenges to corporate libraries, as many resources have a small number of actual users as compared to the total number of company employees.

What are libraries in the for-profit world doing to soothe the sting? Here, Sarah and Steve returned to the similarities of corporate and academic libraries. Corporate libraries are focused on online resources, reorganizing workflows, and building portals to tailor resources to their companies’ needs.

Mary Marshall, an independent consultant and former librarian, speculates that while methods may have changed with the ongoing move to electronic format and delivery, the lifecycle of serials remains the same. Using examples from academic libraries as well as commercial organizations, Ms. Marshall elucidated ongoing changes in technical service, public service, and publishing. Most specifically, changes such as federated searching, blogs, wikis, RSS feeds, simpler interfaces, and the ongoing consolidation of resources have resulted in increased utilization of all library resources. The “digital revolution” was generally intimidating to everyone; implementation of digital initiatives required a great deal of investment on the part of all persons affected. Traditionally, serials librarians performed their work in technical services, where it had been relatively transparent to the end-user. The digitization of content has created issues with identification and delivery, and requires input from multiple people and departments, not just one serials librarian. This new dynamic, while ultimately accomplishing the task of making content available to patrons, may require major organizational change. Information sharing, consortial arrangements, and collaborative relationships with publishers, Web 2.0, have made these changes easier to manage. One cooperative project of note is the Shared Electronic Resource Understanding (SERU).
The SERU project seeks to save both publishers and libraries time and money, and provide a simpler method of acquiring and maintaining access to licensed content. Once a library has acquired that content, how does the library ensure users can find it? Ms. Marshall relates that the library search interface at one academic library was evaluated in terms of how best it served the user. It was discovered that the secret to an effective user interface was the utilization of just one federated search box. When it was implemented, users were no longer frustrated by the tasks of identifying and utilizing the search function. Properly identifying how users seek out and access information is an important component of content provision. The sole purpose of technology in libraries is to get information into the hands of the user. Recognizing this purpose, and implementing programs which will ensure support of the technology, is the latest task for librarians. Fortunately for us, continuing development in library organization, communication between librarians and publishers, and ongoing digital initiatives should help.

Harnessing the Spider Web: Collaborative Serial Maintenance, Challenges and Solutions at UC
Sarah Gardner, University of California, Davis;
Melissa Beck and Valerie Bross, University of California, Los Angeles
Reported by Marit S. Taylor

Sarah Gardner presented background on this project and explained how it was implemented at UC Davis. In the wake of national and UC-wide studies of how to meet local needs while providing more efficiency, collaboration and quality in cataloging, the UC CONSER Funnel project was established in April of 2006, in coordination with the Program for Cooperative Cataloging. As background information, UC has ten campuses, 100+ individual libraries, with a shared library catalog, Melvyl, and shared offsite storage. They also have a large shared digital collection, the California Digital Library, which includes both commercial content and digitized UC content. Cataloging and maintenance for these electronic resources were performed by UC San Diego for the whole university system. The original idea of working with CONSER for print serials came from Pat French at UC Davis. UC Davis had a particular motivation. For many years they had been an RLIN library, and in late 2005, as part of a large OCLC reclamation project, they needed to overlay a massive number of serial records, which created many problems. For example, UC Davis wanted to preserve information in their local records that should have been in the national OCLC records.

Valerie Bross explained how the funnel project was set up, and provided general information about the process. Three volunteer positions were created: a Funnel Coordinator, Valerie Bross; and Coordinators for Training, Melissa Beck; and Communications, Renee Chin. The UC libraries would have a group identity in CONSER, and all UC libraries would be members, although not all had the administrative support to be active participants. The process was intended to be incremental. Existing CONSER libraries would provide training, onsite visits, and support. Only UCLA and UCSD were previously CONSER members. Catalogers at UC Davis and UC Irvine were the first to be trained by Melissa Beck. UC Davis serials catalogers, not previously trained in NACO, also attended NACO training at UC Berkeley, which although not required by CONSER would be very useful. UCLA and later UCSD librarians reviewed the new catalogers' work for an initial period.

Melissa Beck, the training coordinator, explained how she approached training the serial catalogers, which she found very educational. So far, campuses at Berkeley, Davis, Irvine, Santa Barbara, and Riverside have been trained. Maintenance work is expected, including modifying pre-AACR2 records, and special collections have been cataloged at Davis. There is a listserv in place to discuss issues between campuses. The goal is to involve more campuses.

The program has many advantages. Catalogers get more training and the quality of work improves. Work done at one institution is shared with others, saving money and improving quality. The cataloging processes at all libraries become more standardized and consistent. Lastly, participating libraries benefit from
substantial OCLC credits for CONSER work, lowering their OCLC costs, which is very helpful at this time of tight budgets at UC.

The presenters made suggestions for those interested in setting up their own CONSER

funnel project. Documentation on the UC project is available at http://libraries.universityofcalifornia.edu/hots/conser/.

CORE: Cost of Resource Exchange

Jeff Aipperspach, Serials Solutions; Ed Riding, SirsiDynix; Ted Koppel, Auto-Graphics (co-author, not in attendance)

The authors came to propose a CORE standard out of a philosophical background that values “Cooptition”. Cooptition is defined as “cooperative competition,” a practice wherein competitors work with each other on a project basis to bring a product into the marketplace.

CORE origins began as a partnership between SirsiDynix and Serials Solutions to sell Serials Solutions ERM. The authors looked at the intersection between the two systems and found that the cost and acquisitions information elements were the ones that struck them as essential to an interchange. They proposed a standard that vendors and librarians could see as the “Holy Grail” for resource management systems. Since the standard would facilitate the extraction and exchange of financial and related data from business service systems for use in the ERM, and share and not duplicate the information that is held elsewhere in existing systems, it was seen as the “Holy Grail”. This standard will enable libraries to continue to use their existing ILS systems and other business systems. It will also enable the library to select its ERM based on the strengths and functionality of the particular system that suits them, since standardized data transfer will make systems interoperable. CORE can work with SUSHI to enable the ERM to calculate more easily a “cost per click” analysis for titles. It will reduce the labor-intensive process of maintaining data in multiple systems, and allow libraries and vendors alike to have time to focus on quality of service to patrons and clients.

They wrote a description of CORE and submitted it to NISO, which has approved CORE as a proposal. There are proposed data elements which were suggested through library input and were also driven by the use cases that have been suggested so far. Proposed data elements for CORE are: unique order ID, which serves as a match point; acquisitions status and date; fiscal year; budgeted cost; fund code; currency; purchase order line or note; invoice information, amount, currency, date, number and note; subscription start and end dates; reference number; vendor information, number, ID; contact name, address, email, phone; and selector. Other requested elements are: discount; subscription type; renewal / cancellation date; print cancellation date; method of acquisition; payment date and instructions; vendor notes, and ILS notes.

The next step is for NISO to develop and write a draft standard and make it available for testing. The authors suggested that the work on this proposal could be split into two main fronts: deciding on the payload, data elements; and selecting the means of transport.

Marketing Library Database Services to End Users

Brie Betz, Elsevier;
Stephanie Willen Brown, University of Connecticut;
Deb Barberi

In light of the substantial funding that libraries are compelled to direct to research databases, basic accountability dictates that library administrators must be able to justify the ongoing commitment of these monies. Usage statistics for library materials have traditionally been an essential component of collection assessment and certainly remain so in the digital
environment. The presenters of this session covered the overview and implementation of the student ambassador, SAm, program developed by Elsevier in conjunction with the SCOPUS research database. Brie Betz provided the following url for more detailed information: http://www.info.scopus.com/setup/promo/.

Essentially, a SAm is a graduate student who is trained to demonstrate SCOPUS to subject librarians, faculty, students and other researchers, to show these constituents ways to expand and improve search results and to provide feedback for further product development. Based on a review of the total number of searches conducted at six participating institutions, Elsevier observed that usage nearly doubled over a five-month period. Betz went on to demonstrate that the University of Connecticut's experience with the SAm program did indeed increase searches at her campus by 275%. Most notably, one of her PowerPoint slides indicated phenomenal increases for October and November 2007 over the same months in 2006. In general, the total number of searches for 2007 was 45,651, compared to 16,548 searches in 2006.

Stephanie Brown discussed the implementation and administration of the SAm program at the University of Connecticut. She explained that Elsevier paid for the SAm's time, while her time was paid by the university. The training took 4-5 weeks, after which the SAm taught one session per week for 6-7 weeks. A variety of incentives, including food, of course, but also gift certificates, were employed to entice attendees to participate. Evaluations were “overwhelmingly positive.” Administering the program took approximately 2-3 hours per week, and was comparable to supervising a student worker. Brown verified that usage of SCOPUS did increase, as indicated in Betz's slides. Brown indicated that she would definitely repeat the program with a few adjustments, such as using e-mail more.

Deb Barberi described her experience as a SAm, from the training, to the meetings with librarians, to scheduling and planning, to the preparation of the PowerPoint presentation used in the outreach sessions. The sessions included an online demonstration of the SCOPUS database, as well as a hands-on session. Wrap-up was a vital part of the session and included evaluations, gift certificates, and a raffle. Citation searching is highlighted as a crucial discovery tool. Barberi explained that most of the SAms were international students, and that expertise varied widely prior to training for the program. She also shared that the unquestionable success was due to a number of factors: the support of library staff; the flexible agenda, the hands-on experience, the prizes, and gift certificates. As an added bonus, the SAms, and probably most of their participants, had fun!

**TACTICS SESSIONS, GROUP 3**

**Using Institutional and Library Identifiers to Ensure Access to Electronic Resources**

*Helen Henderson, Ringgold; Don Hamparian, OCLC*

Reported by Janet Arcand

Helen Henderson of Ringgold started the discussion of two similar initiatives to create standardized institutional profiles. She described the 15 steps in the order/fulfillment process. Each step is a place where the order can go astray and be rejected. This is especially true if elements do not match up due to changes in name, agent, publisher, hosting platform, price, bundle, license, or authentication. Ringgold provides customer information for publishers through the “Identify” database and services. Identify’s institutional profiles contain: institutional ID number; name in the customer’s local language; anglicized name; customer location; classification, e.g., corporate, academic, etc; size, various metrics are used; URL; related institutions; consortia membership; and library name. It can take months to work through a publisher’s customer list and create all the records. Customers in Asia, Latin America and Europe may require more time since they may not already be in the Identify system. The cost is on the publisher side, not the publisher’s customers.

Don Hamparian of OCLC stated that centralized data was essential for delivering content and service more efficiently on the Web.
OCLC’s “WorldCat Registry” is one and a half years old and stores the following community information: unique identifier, WorldCat ID and secure HashID; name; other standard ID numbers, ISIL, OCLC symbol, SAN, NCES; electronic and physical location; IP address; library services, catalog URL, virtual reference; deep link; relationships; contacts; and search and retrieval Web services. There are now 93,000 records, prepopulated with pre-existing OCLC data, augmented by libraries and other partners. It is free for libraries to maintain their profiles and share with partners. Libraries can use it to register OpenURL resolvers and IP addresses, and to share their profiles with selected organizations. OCLC uses it to configure WorldCat Local and for OPAC deep links for worldcat.org’s fulfillment options. Vendors can use it as a source for an OpenURL gateway and library profile information, if granted permission by the library.

The two presenters saw potential intersections for Identify and WorldCat Registry as possible areas of cooperation, and the possibility of mapping WorldCat IDs to Identify Institutional Identifiers. OCLC has many public and school library profiles that Ringgold lacks, while Ringgold has many corporate libraries that OCLC lacks.

John Shaw indicated that a publisher such as Sage Publications could use these resources to uniquely identify the institution and their components; to group subscribers together; to facilitate the production of holdings lists; to define consortia tiers; to facilitate de-duping and data cleansing; and increase the efficiency and accuracy of transmissions between partners.

The Sting of Releasing Print Journals: Surviving the Transition to an Online Environment

Michael Arthur, University of Central Florida;
Ellen Safley and Debbie Montgomery, University of Texas at Dallas;
Carol Ann Borchert, University of South Florida
Reported by Karen Buntin

In this session, four presenters from three institutions discussed their strategies for converting print titles to online. Budget cuts were a driving factor in most cases. Common themes included: extremely low usage of print titles; restrictions on cutting electronic titles acquired through big deals and consortial agreements; and reliance upon aggregated content even when it is not viewed as stable. Additionally, these institutions met budget shortfalls in other similar ways, such as hiring freezes, cutting titles in other formats, and halting binding services.

Similarly, at the University of South Florida, budget deficits lead to cuts in a variety of areas. While e-journals were protected, most microfilm subscriptions were cancelled, binding of periodicals was halted indefinitely, and the serials staff shrank. In converting titles from print to online, several criteria were considered, including perpetual access, system-wide access including remote users, IP authentication, and equivalence of content to print. Faculty input was also solicited through a survey of their use of the print journals collection.

At the University of Texas at Dallas, the strategic plan was to go as electronic as possible, employing criteria such as the quality of online graphics, well-transposed print, and the availability of an archive. Electronic usage is monitored through the collection of usage statistics; to monitor print usage, shelvers scan items when they clear a floor, and this information is uploaded into the ILS. Facing budget cuts, they used this data to consider underused databases, underperforming print standing orders, and print periodicals. With further cuts, they cancelled the print approval plan for monographs, leisure reading and audio
book collections, more print standing orders, and
underperforming print journals. While the budget
was restored for 2009, they are reluctant to add
new titles, using ILL and course reserves
information to help determine new purchases.

Follow-up questions and answers addressed the
difficulty of adding large numbers of individual
electronic titles because of the complexity of
contract negotiations; the good value for the
money of big deals; the lack of a state school to
act as a final archive; the difficulty of cooperative
collection development since state-wide
consortia generally buy the same things; and
differing philosophies when considering print
and microform subscriptions for cuts.

**Workflow Challenges: Does Technology Dictate Workflow?**

*Vicki L. Parsons and Jessie Copeland, Georgia Gwinnett College; Jennifer J. Leffler, University of Northern Colorado*

*Reported by Mary Bailey*

“New Challenges, New Position: Creation of the Resource Management Librarian” was
presented by Jessie Copeland, the newly hired RML at Georgia Gwinnett College Library.
Georgia Gwinnett College, GGC, a new state
college, was previously a University System of
Georgia campus. While part of the University System of Georgia, all new material processing
was done before items were received.

In the new workflow materials are all processed
in-house. The entire staff of GGC includes eight
librarians and four support staff. Four of these
positions make up the Collections Department:
the head of collections, who orders materials
and has administrative duties; the RML, who
catalogs all materials, provides access,
troubleshoots, keeps statistics, etc.; one library
assistant III, who performs check-in and copy
cataloging; and the acquisitions librarian, who
pays invoices. Focus on the new RML position
illustrates the intent to treat the collection as a
whole.

The workflow is designed to have one person
handle the process from receiving until physical
processing; moving each item through quickly,
rather than handing items off to multiple people.
While it is understood that this may not work in a
larger library, it is working for GGC. It is
expected that as the library expands other staff
would be hired, but with 5,000 new items added
within the past year this approach is working
right now.

Jennifer Leffler, University of Northern
Colorado, has a different situation. She is also in
a new position but in an older school. With a
student FTE of 10,794, the library has 17 faculty
and 32 support staff. The electronic resource
librarian was hired as part of the Technical
Services Department, but no one really knew
what the job would entail and no documentation
existed. After just four months of trial and error,
but still no documentation, Jen found herself
with a new boss who had no previous library
experience. Steps were being missed, miscommunication was a problem and the
previous staff was very uncomfortable as their
jobs changed to meet new needs.

To better understand her own job and the
workflow, Jen created a flowchart as a way of
documenting her procedures. That flowchart
became her procedure. It became a starting
point for conversations; it provided oversight of
the processes; and it was easy to update when
steps changed. It was tangible for staff learning
new steps and a great PR tool for the public
service librarians.

The flowchart idea has caught on so well, it is
being expanded at UNC both within the
Technical Services Department and in other
areas. The most ambitious request has come
from the business librarian who would like a wall
size chart with a magnetic back, allowing them
to track all purchases.

Questions following the presentation focused on
training existing staff to work with electronic
materials, whom to train, and what can be
dropped to provide time for the new tasks.
Three speakers conducted a session aimed at gathering information, ascertaining interest levels, and developing ideas to resolve challenges related to title display practices for electronic journal publishers and provider websites. These issues indicate a need for participation from the stakeholders to establish and implement best practices. Additionally, interested parties are encouraging NISO to put together a working group to address these matters.

Regina Reynolds of the US ISSN Center described current circumstances that often lead a user “off a cliff” when a link is followed and the resulting title display differs from the citation information. This can result when a journal that has gone through one or more title changes is displayed on a publisher/provider website under one heading, generally the latest version of the title, with no reference to the previous titles. If a user possesses a citation for an issue under a previous title, and the link leads to the correct content but is labeled under a later title, the user will likely be confused. The user metaphorically falls off the cliff and often abandons the search. To add to the muddle, volume, number and issue discrepancies can also exist in addition to title hindrances.

Not all hindrances end a search, however. Searches can be successful if the citation information resembles the accessed title closely enough that the user presses on with the quest. Successful searches in these circumstances result because the user managed to follow the breadcrumbs. However, “Breadcrumbs are good, but not good enough,” said Reynolds. She added that, “We cannot rely on some title changes being recognizable and some not.”

Steve Shadle of the University of Washington expressed regret that in many situations, “Content is being paid for and hidden by erroneous data.” Suggestions from Shadle and others as possible boons include the newly-launched linking ISSN as well as OCLC’s xISSN service.

A discussion period followed the panelists’ remarks. Audience member Bob Boissy remarked that publishers sometimes want to display all content under the latest title for marketing purposes, but that a more complete title list would be a promotional mechanism. Another issue mentioned in the discussion was the accuracy of citation building software results when incorrect title information is provided. A solution suggested was for publishers to hire cataloger employees or library advisory boards. However, while large publishers might be able to afford to do this, small publishers might not be able to do so. Also on the horizon is the possibility that NASIG members may find themselves in the roles of advisors for publishers.

**Improving OpenURL Metadata**

*Glen Wiley, Cornell University*

Reported by Wm. Joseph Thomas

The creation and adoption of the OpenURL standard solved several important problems for libraries. The standard permitted end users to navigate from one resource, such as a citation in an online index, to another, such as the article indexed, without requiring them to execute a second search in the destination resource. By reducing linking dead ends, providing multiple access points to content in a single location, and connecting users to the most appropriate copy of the content, OpenURLs improve the visibility of resources. This improved visibility increases the usage of the library’s selected content, and may also reduce document delivery costs. Yet, problems with OpenURLs remain, and can be difficult to track and correct. To address some of these problems, librarians at Cornell University have begun working on a study of OpenURL metadata quality. Their goal is to create a systematic approach to measuring and validating metadata quality so that libraries and content providers may collaborate on solutions.
for metadata problems. One member of this project team, Glen Wiley, shared details about the types of problems this approach seeks to remedy, and the status of the project.

Project team members began by reviewing a log file provided by Cornell professor Éric Rebillard, director of graduate studies in the field of classics at Cornell University, and editor of L’Année Philologique on the Internet. Next, inspired by the Metadata Quality Evaluation for the Open Language Archives Community, team members started mapping OpenURL data elements to a matrix. This process would generate a score for each OpenURL passed to the server. Failures have occurred as a result of errors in both semantic and syntactic features. Some of these were identified five years ago by Miriam Blake and Frances Knudson in their 2002 “Metadata and Reference Linking” article. Errors in passing ISSN; date and chronology identifiers; and lack of UTF-8 encoding; as well as inconsistencies in recording volume, issue, and start page were common reasons for failure to resolve. By mapping OpenURL elements to a scoring matrix and sharing the results, project team members hope to generate quantitative measures with specific feedback to which content providers can respond.

Problems in OpenURL metadata are widely perceived among librarians, as captured by responses to a survey that was part of a 2007 United Kingdom Serials Group report, “Link Resolvers and the Serials Supply Chain.” The potential magnitude of OpenURL problems grows in relation to the expanded volume of OpenURL traffic. Consider the number of OpenURL requests for just one university in a relatively short time period: between December 3, 2007 and February 8, 2008, the Cornell University Library link resolver received more than 53,000 OpenURL requests. Therefore, project team members hope that a jointly-developed approach like this can benefit libraries, service providers, and content providers. Currently, librarians at Cornell are completing the matrix for mapping and scoring OpenURL metadata quality, writing software to automate as many of the processes as possible, seeking long-term funding, and trying to determine how much the project can scale.

POSTER SESSIONS
Reported by Gene Gardner

Six posters were presented for discussion.

The Prize of Vigilance: Reclaiming Acquisitions Funds Through Format and Use Data Review

deg farrelly, Arizona State University

Farrelly illustrated how the library in 2006 and 2007 applied internal use data and availability in other formats to inform serial cancellation decisions. The outcome was a savings in acquisitions dollars, shelf space and fiche storage.

Creating and Maintaining a Web List of E-Journals With RSS Feed

Paoshan Yue, University of Nevada

In early 2005 the library began collecting e-journals with RSS feeds and then presented them on the library’s website. The poster explained how they created the list as a data-drive webpage. The list is available to view at http://www.library.unr.edu/ejournals/alphaRSS.aspx?p_subj=6.

Scientific Data As End Product: Does the Concept of “Serial” Have a Role?

Jonathan David Makepeace, Canada Institute for Scientific and Technical Information, CISTI

CISTI has maintained a depository of unpublished data since 1964. Much of this data has been made available via their website for Canadian IP addresses. Jonathan looked at the
traditional concept of “serial” to see if this is important in terms of validation authority or economic models.

Solved at First Sting: a Flowchart to Take the Deadly Sting Out of Troubleshooting E-Resources
Deberah England, Wright State University

The flowchart demonstrated the steps involved to make troubleshooting e-resources more logical and easier to understand.

Using ERM to Provide Subject Access to Journal Databases
Paul Moeller, University of Colorado at Boulder

This poster described how CUB now utilizes a dynamically updated “Find Articles and More” page which is generated from their electronic resource management system. This allows alphabetical access to their databases.

Displaying EJS and Ingenta Titles: an A-Z List Challenge
Beverly Geckle, Middle Tennessee State University

Beverly developed a way of providing access to their journal list by utilizing the EJS platform and the Ingentaconnect platform. She provides title access through the A-Z list but not coverage since she relies on the EJS and Ingenta platforms to provide the dates.

USER GROUP MEETING

Sirsidynix User Group Session
Sharon Dyas-Correia, University of Toronto
Reported by Sharon Dyas-Correia

Almost twenty SirsiDynix customers attended the Sunday morning informal user group meeting in Phoenix. Sharon Dyas-Correia, SIRSI Serial Enhancements Forum moderator, began the session by welcoming everyone, introducing herself, presenting a basic agenda, and polling attendees as to which product version they use.

Ed Riding, the SirsiDynix representative attending NASIG, was unable 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. The deadline for voting on current enhancement suggestions was extended to July 15, and more active participation in the process is essential to obtaining product improvements.

Sharon presented a summary of the expected enhancements for Symphony 3.2, and enhancements under consideration for 3.3 or later versions, that were announced at the SirsiDynix SuperConference held in April 2008 in Detroit, Michigan. Enhancements for version 3.2 included: improvements to sorting options for received issues; delete received issues tool button and report; additional dialog to alert receivers that there are no more expected issues; CONSER 891 pattern loading support; title sorting for prediction as late report; printing ISSN on printed serial claim notice; print serial issue label report; serial controls without prediction report; and MARC holdings export report and holdings output options.

Enhancements under consideration for future versions of Symphony included: report options to list serial controls by distribution; an updated serial control print tool to output extended information entries; an option to update serial control fiscal cycle field on rollover; the ability to re-link or transfer a serial control record from one bibliographic record to another; and a tool to
allow viewing and editing vendor information in prediction, receipt and claim records.

Considerable discussion of future directions and product development followed and several attendees expressed disappointment that some enhancement requests made over the past few years are still only under consideration for future versions. Many tips and tricks were shared as well. Sharon asked if there were any final questions or comments and adjourned the meeting when the allotted time was over.

NASIG BUSINESS MEETING MINUTES
JUNE 6, 2008, PHOENIX, ARIZONA
Joyce Tenney, NASIG Secretary

CALL TO ORDER AND WELCOME (SIMSER)
At 12:33 p.m., June 6, 2008, Char Simser, NASIG president, welcomed everyone and called the meeting to order.

HIGHLIGHTS OF THE PAST YEAR (SIMSER)
Simser reported that it has been a very busy and productive year. She noted that many NASIG members contributed to the successful year, and she had many to thank for an outstanding year. Simser noted the following accomplishments for this year:

• The election process was online for the first time.
• New conference registration site was created.
• Administrative Support Task Force was created to develop a job description for paid staff for NASIG.
• Several new NASIGuides were developed and posted this year.
• A new column in the NASIG Newsletter was created to highlight the great working being done by our members.
• The NASIG Executive Board updated the strategic plan and has developed an eighteen month action plan. More information on this topic will be in the Executive Board meeting minutes.
• Late breaking news: We are in the beginning stages of discussing the possibility of NASIG assuming the editorial responsibility for The Serials Librarian.
• Our new NASIG website went live. Special thanks to Donnice Cochenour for assuming leadership on this massive project. She spent countless hours with others developing, testing and tweaking the site.

Simser introduced the current NASIG Executive Board members: Jill Emery, vice president/president-elect, Peter Whiting, treasurer, Joyce Tenney, secretary, and the members-at-large, Rick Anderson, Anna Creech, Kim Maxwell, Alison Roth, Bob Schatz and Jeff Slagell. She then introduced the incoming board members for the 2008/2009 term. For 2008/2009 Jill Emery, president, Rick Anderson, vice president/president-elect, Peter Whiting, treasurer, Joyce Tenney, secretary and the members-at-large, Bob Boissy, Anna Creech, Kim Maxwell, Jeff Slagell, Virginia Taffurelli and Sarah Wessel.

REPORT OF THE TREASURER
Whiting reported that NASIG currently has $542,000 on account. The conference expenses are still outstanding. We have $65,000 in our Charles Schwab account. Whiting noted that we received $11,000 in organizational sponsorships, and $200 from member donations this 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 Continuing Education Committee will be asked to work on developing regional programming. All NASIG members are encouraged to offer suggestions for programs and speakers.
• The technology implementation of the ArcStone software was discussed. Special thanks were given to Donnice Cochenour,
Lisa Blackwell, the Electronic Communications Committee, Database & Directory Committee, and Nominations & Elections Committee for all of their work during this process.

- The Financial Development Committee has been formed. They will be reviewing and updating the financial plan.
- The strategic plan update was discussed and plans for the coming year were outlined.

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

**RECOGNITION OF COMMITTEE CHAIRS**

Simser announced the names of committee chairs and task forces. She distributed gifts to outgoing chairs and board members.

**CALL FOR OLD BUSINESS**

No old business was raised.

**CALL FOR NEW BUSINESS**

A question was raised prior to the meeting on organizational sponsorship. Simser discussed the background of organizational sponsorship and future plans. She noted that organizational sponsorship has been discussed in a variety of venues since the 2005 conference. It has been the topic of a town hall meeting, brainstorming session, discussed in the NASIG Newsletter, and in general announcements. The need to keep membership dues down, and keep the conference fees affordable were the driving forces in pursuing this fundraising option. This year was an experimental test run and we raised $11,000. The organizations donating were recognized with signage and at the opening session. Simser opened the floor to questions.

Tina Feick asked how the process will go forward and how will solicitations be made in future years. Simser reported that this year was a test year, and during this time forms have been developed and procedures drafted to outline timelines and procedures for the solicitation process. She noted that the forms and information on organizational sponsorship would be posted on the NASIG website. Many organizations such as universities in the area of the annual conference, Google, Microsoft, library associations, etc., would be included in the annual solicitation, not just corporations. The past president will be charged with the responsibility of organizational sponsorship.

Regina Reynolds noted that she attended an event that had small tables for sponsors at the registration area. They could distribute informational materials or show samples of products and sponsors were given demo time at the lunch break. This allowed for low key representation for sponsors. Creech noted that NASIG tries to keep all of the members in NASIG on an equal footing, so we would need to work closely with members from all demographics to see if something of this nature would be acceptable.

Simser thanked all for their ideas and comments. She reminded all to complete the online conference evaluation form by July 1, 2008.

Simser called for any additional business. None being received, she adjourned the meeting at 1:19 p.m.

Respectfully submitted,
Joyce Tenney, NASIG Secretary

Approved 7/19/08

**BRAINSTORMING SESSION**

**WORKING COLLABORATIVELY WITH OTHER ORGANIZATIONS**

Moderated by Jill Emery, University of Texas
Reported by Lori J. Terrill

The brainstorming topic this year was working collaboratively with other organizations. Specifically, what do NASIG members think of the idea? What groups might we choose to work with on a project? What types of projects should we do? One example of collaboration this year was the NISO preconference on metadata.
Betty Landesman brainstorms.

The floor was open for comments and ideas which included:

- Partner with CONSER, including presenting Serials Cataloging Cooperative Training Program (SCCTP) workshops as preconferences. This has been done in the past.
- Partner with the United Kingdom Serials Group (UKSG) specifically presenting a UKSG program at NASIG.
- Partner with library schools.
- Partner with the North Carolina Serials Conference.
- Partner with the Ohio Academic Libraries Group.
- Target under-represented groups, such as public librarians. The Public Library Association (PLA) could be a potential partner.
- Partner with state or regional library associations, particularly those affiliated with the state the annual takes place in that year.
- NASIG should have a presence at state and regional library conferences. NASIG members could take brochures and set up a table in the vendor exhibits. NASIG could provide a guide for doing this, including talking points.
- Members could consult NASIG’s Speakers and Consultants Directory when planning local conferences.
- Target more conference programming towards non-librarians so that their organizations/companies will want to partner with us.
- Partner with publishers, including international ones.
- Partner with Society for Scholarly Publishing (SSP). This would be a particularly good time to do this as their current president is a NASIG member, October Ivins.
- Implementation of a year-long mentoring program could be a way to develop relationships with publishers.
- NASIG members could serve as an advisory group to small publishers.
- Collaborations would not have to be at the annual conference, they could also be at a regional continuing education event.
- Consider joint or overlapping conferences with other organizations.
- From the annual conference create “the best of NASIG” to take on the road as programming for other conferences or continuing education events. Note: The Executive Board is already talking about this possibility. Programs would not necessarily have to be delivered by the original presenters.

There was a suggestion to change the time of year that the NASIG annual conference is held because it is too close to the American Library Association’s annual conference and some state conferences. This idea led to a lively discussion generating some additional points:

- Moving the conference requires changing the NASIG calendar and we would have to go more than a year without a conference.
- June is a busy time for publishers.
- If we move the conference, weather could be a problem with winter weather conditions to deal with in the north and extreme heat and/or humidity possible in the south, depending on the month selected.
- What months have the fewest conflicting events, possibly February and March?
- We could pick the month by whom we want to partner with in a given year and plan our conference timing and location around their conference. Would this impact our ability to negotiate good deals with conference facilities?

Jill thanked everyone for participating and invited members to send any additional comments to any of the Executive Board members.
NOTES OF DISCUSSION

Comments on conference from attendees

• Resort was somewhat isolated. Not good distribution of information on city bus availability.
• No dessert opening night.
• Service was excellent at the resort.
• Lots of positive comments. We should consider returning to Tapatio Cliffs.

Thoughts for next year’s CPC

• Have a laptop devoted to the CaféPress site, so attendees can purchase conference souvenirs.
• Have one type of each shirt to raffle off during the conference.
• Have a link on the registration form to CaféPress.
• Need more computers for Internet Café.
• Need a ADA station for Internet Café.
• Have Internet Cafe in a room not a hallway and have chairs.
• If doing a line for food and not various stations, have at least two lines to avoid the problems of the museum event. If we return to Phoenix, do not use Arcadia Farms catering again.
• Make sure non-members can access handouts from conference.
• Check links to handouts.
• Make sure that A&R and CPC get accurate lists for awards and announcements for next year.
• The “Meet the Board” session needs to have more information on the schedule and maybe need to rethink format. Perhaps note that this is a forum to ask about being on the board and what it entails.
• Do travel advisory as air travel is getting problematic for smaller airports.
• Will need lots of PR starting early in summer.
• Target local organizations and east coast organizations to get the maximum number of people that can drive in to keep our numbers up.

Continuing Education Committee

• Initial concern over the charge to have money-making programs for the year, but they are excited about the opportunities.
• The co-chairs of the committee will be distributing the work throughout the committee to keep burn out from happening at the co-chair level.
• They will be using the same platform as the conference registration form for registration for Continuing Education programs.

All NASIG committees

• Char asked all to review committee charges with their committees and see if we need any revisions or updates. Bring suggestions to the fall board meeting. Publications/PR Committee will need to reword their charge with the introduction of organizational sponsorship.
• Remind all committees that official NASIG PR should go through the Publications/PR Committee.
• The Proceedings editors were concerned over the announcement that NASIG might assume editorial responsibility for *The Serials Librarian*. Emery noted that it would not fall to Proceedings even if it did occur. Would be spread out among other members.

Thoughts from brainstorming session

• There was positive feedback on working with ER&L. Emery will pursue.
• There was positive feedback on working with state associations and CONSER. Need to have Pub/PR pursue getting announcements of NASIG meetings out on the CONSER listserv and other state associations close to the area of NASIG programs.
An idea of an advisory board for small publishers came up in working with SSP. It would be similar to a mentoring relationship.

The idea of having a joint conference with organizations like SSP and SLA seemed to have support.

The idea of taking the best programs from the NASIG conference on the road to local areas had a lot of support. CEC will be looking at this for the coming year.

The idea of moving the conference from the typical May/June time to earlier in the year was discussed. There were pros and cons for any month of the year. The idea was tabled until the bids for 2011 are issued to hotels.

NASIG assuming editorial responsibility for *The Serials Librarian*

Emery spoke with Bev Ackerman and will be speaking with Bill Cohen. A possible target date is late 2010. This would give over a year to get a plan in place.

Emery noted that there would not be a collected volume for the conference. Taylor & Francis are talking about 8 issues per year, so conference articles may need to spread out through these issues. Lots of issues and ideas to be discussed in this process.

Proposal from UKSG for creation of award to have a NASIG member attend UKSG and then stay over for a week and work with a UK librarian, and have a UKSG member attend the NASIG conference then stay over for a week and work with a US librarian.

Emery noted that Sage and Taylor & Francis would sponsor this.

Need to have A&R develop a proposal for 2010. Proposal should include how we will vet the applications and coordinate with UKSG.

Possibility of naming it after Rose Robischon.

Possibility of having a publisher that could work with a librarian and then the librarian could work with a publisher.

**NASIG’s 25th anniversary**

Need to start a task force to write a history of NASIG.

Look at doing an oral history, perhaps look for some grant funding.

**REPORT FROM THE 2008 AWARD WINNERS**

Sarah E. Morris, Awards & Recognition Committee

NASIG’s 2008 awards cycle drew many commendable applications. The following is a snapshot of the applications process, the award winners, and a survey of winners’ conference experiences.

The Awards & Recognition Committee received twelve applications for the Student Grant Award, seven applications for the Fritz Schwartz Scholarship, seven applications for the Horizon Award, sixteen applications for the Serials Specialist Award, and one application for the Marcia Tuttle International Award.

The identities of the applicants were blinded from each committee member, and committee members removed themselves from judging any award for which they knew an applicant. For 2008, the committee awarded six Student Grants, one Mexico Student Grant, one Fritz Schwartz Serials Education Scholarship, one Horizon Award, one Serials Specialist Award, and one Marcia Tuttle International Grant.

These awards covered the cost of travel, room and board, and registration fees for the 23rd NASIG Conference held in Phoenix, Arizona, and a one year NASIG membership. In addition, the Fritz Schwartz Scholarship winner received $3,000 to help defray the costs of library school tuition. In lieu of a conference stipend, the Marcia Tuttle International Grant provided a $3,000 grant for the recipient.

The 2008 award winners are as follows:

**NASIG CONFERENCE STUDENT GRANT AWARD**

- Eugenia Beh, University of Texas at Austin, School of Information
- Barbara Birenbaum, University of California—Los Angeles, Department of Library and Information Studies
Schmitt may present a summary of her findings at the 2009 NASIG conference in Asheville, North Carolina.

All award winners except Stephanie Schmitt attended the conference in Phoenix. When they returned home the committee sent out a survey to the recipients to provide feedback about their conference experience. A summary of their responses is included below, following the survey questions.

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

- “The workshops alone offer such an insight into current serials issues for newcomers and provide an incomparable learning experience...all set in an environment that is very supportive and encouraging.”
- “…the immersion into ‘all things serials’ can lay the foundation of a serials career from a standpoint of getting it, as opposed to reaching for, and not getting, the big picture.”
- “The conference also provided great access to vendors to learn that side of the business.”
- “This is one...rare opportunity for entry-level professionals and students to meet and learn from other serials professionals in an intimate and low-key environment.”
- “The serials field has a very high initial learning curve, and meeting to discuss issues with other serialists helps newcomers better understand the various opportunities and complex challenges in the field.”
- “The experience allow[s]...the newcomer to know [the latest] topics related to...serials.”
- “Networking with others working in the same department and sharing the same experiences and issues only common to serials librarianship.”
- “The conference gives the newcomer many opportunities to discuss problems that they may be having in regards to serials, budgets and implementations of various software and system upgrades.”

How did attending the conference benefit you personally?

- “I made several key friends and acquaintances on both coasts and in varying ranges of institutions.”
- “The chance to see a different perspective of librarianship in North America.”
Many of the programs were directly relevant to the kind of work I am already doing. Talking with many librarians...gave me perspective on the job search."

"Finding that there are other libraries and librarians with the same experiences and problems."

"I gained so much from this conference, not the least of which is the enthusiasm and inspiration I came away with from the vision sessions...The panel presentation on vendors (What they didn’t tell you in library school...) has been of immediate benefit to me in my job."

"I was immersed in various sessions that contained large amounts of information regarding system upgrades, various formats and the increasing challenges that electronic resource management departments are facing...Every session was relevant to my work, which was a nice surprise."

"The conference gave me more of a sense of being a professional in the field and brought me into contact with others with whom I would hope to have a chance to collaborate with in the future."

"It was extremely helpful to meet and network with other serials professionals...I'm able to directly apply much of the information I picked up at NASIG to...my professional development and daily work."

"Seeing the dedication and enthusiasm in other professionals gave me more of a concrete picture of my future career goals and how to achieve them."

"...the conference provided a venue in which I could learn more about positions and career paths influenced by serials that are not necessarily similar to my current position. I am more informed about these alternative opportunities than before attending the conference."

What could NASIG and/or the Awards & Recognition Committee do to improve their award programs?

Transportation difficulties were cited twice.

"Would "be best if the award can be for more people," as demand is high."

"Hand out the awards on the floor, "rather than on a stage."

""...it was far more than I had expected. Anything in addition that can be done, perhaps through the...Outreach committee, would be more than worthwhile."

"After accepting an award, an [immediate] emailed summary of these "nuts and bolts" issues [travel, etc.] would be good."

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

All answers here were positive; one person couldn't think of any improvements and the rest listed more positive comments about their experience.

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

"More activities in the evening after the sessions and dinner."

"For those who have never been at a professional conference before, it might be helpful to point newcomers to a general conference etiquette and expectations guide."

"...having a limited number [of conference t-shirts] for sale at the conference."

"NASIG folks were a very friendly and approachable bunch and that’s what really made the conference great for me."

"...the award is a great incentive for all the winners to keep moving forward, doing the best everyday."

"All [your] efforts and support are very good."
• “I just wanted to...thank all the members of NASIG for supporting programs such as this. It was a great honor to receive the award and a memorable experience.”
• “Everyone was very organized, efficient and very courteous.”
• “I was especially surprised at the level of service in making agreeable travel plans. The mentor program was a great way to kick off the conference.”
• “It was truly a wonderful experience, and I learned a great deal.”
• “There was such a sense of community and respect for every person in the field...there was not any kind of hierarchal pecking order, just professionals coming together to learn about their profession and each other. It was great!”

How/where did you learn about NASIG’s awards?
• Word-of mouth from professional librarians (including supervisors)

Where should NASIG be promoting awards?
• Library school posters
• Library-related and library school listservs

NASIG’s 23rd annual conference was held in Phoenix, Arizona, at the Tapatio Cliffs Resort. The conference featured four preconferences, three vision sessions, thirteen strategy sessions, fifteen tactics sessions, and six poster sessions. Other events included an opening reception at the resort’s Falls Water Village, dine-arounds in Scottsdale, and a reception at the Phoenix Art Museum.

This year, 328 of the 520 conference attendees filled out the online evaluation form. The 63% response rate is one of the best in NASIG history. This boost of 9% over last year’s response rate may be attributed in part to reminders made to non-member attendees via new functionality with ArcStone’s administrative module and a reminder posted to SERIALST. This was the first year that evaluation forms were only available online. As a special incentive to fill out the forms, the Executive Board approved a drawing for a free conference registration for 2009 or 2010. The drawing was entered by 258 of the individuals who filled out the evaluation forms. The winner was announced in the NASIG Newsletter.
Respondents were asked to give ratings on a scale of 1 to 5, with 5 being the highest rating. The overall rating for the 2008 conference was 4.36, slightly higher than last year’s conference which rated 4.23. Respondents were asked to rate several aspects related to conference facilities and local arrangements. These ratings averaged 4.30. Comments were divided between those who loved the resort location and others who found it to be too isolated. The Phoenix location rated 4.15, just below Louisville’s rating of 4.18. The meeting rooms (4.44) and hotel rooms (4.66) received slightly higher ratings than last year. The meals (4.21) and breaks (4.16) were also rated somewhat higher than last year. Attendees were overwhelmingly pleased with the opportunities for breaks and small group interactions. Comments noted a desire for light snacks at the breaks. Social events rated 4.19, slightly down from last year’s 4.21 rating. Many attendees noted that they would prefer to have sign-up sheets for dine-arounds as in previous years.

Online conference information, including the conference website, forum, and conference blog, rated 4.24, 3.58, and 3.51 respectively. Comments suggested that there may be some confusion over the purpose of the forum and blog: Are they intended to convey information before the conference or for use during the conference? Some felt they could have been better publicized and utilized. Another new feature over the past year was the creation of an online NASIG store for conference souvenirs. The majority of respondents (72%) have not visited the store or have no opinion about it. Those who are happy with the selection came in at 23% and those who are not at 5%. Suggestions included several requests for shirt colors other than white, and the addition of useful items like notepads, pens, hats, magnets, and book bags.

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. Attendees were split on the topic, with 34.7% in favor of continuing the practice, 37% neutral or uncertain, and 28.3% preferring the old format of repeating strategy and tactics sessions. Respondents were asked if the layout and explanation of program choices was easy to understand. This area received a 3.98 rating, up from a 3.47 rating last year. Respondents were also asked if there was a balance in the types of programs offered. This aspect rated 4.02, up from 3.95 last year. A few people recommended the Electronic Resources & Libraries Conference as a model for how to do the program.
This year the conference featured three vision sessions. Marshall Breeding’s “Next Generation Library Automation: Its Impact on the Serials Community” received a 3.89 rating. “Information Shadows: Ubiquitous Computing Serializes Everyday Things” with Mike Kuniavsky received a 4.30 rating. The final vision session, “Discovery and Delivery: Making It Work for Users” with Carol Pitts Diedrichs rated a 4.02. The average rating for vision sessions this year was 4.07, up from last year’s average of 3.98.

The thirteen strategy sessions this year generated ratings from 3.78 to 4.50, with an average rating of 4.11. Ten of the programs rated 4.0 or higher, with the highest rating going to Paul Harwood’s “USKG Project Transfer.”

There were fifteen tactics sessions offered in Phoenix. Ratings ranged from 3.11 to 4.49 with an average of 3.89. Eight sessions scored 4.0 or higher. The highest-rated tactics session was “Journal Title Display and Citation Practices” presented by Les Hawkins, Regina Reynolds, and Steve Shadle.

Six poster sessions were presented this year. Ratings ranged from 3.48 to 4.08, averaging 3.80. Deberah England’s “Solved at First Sting: A Flowchart to take the Deadly Sting Out of Troubleshooting E-Resources” received the highest rating of the group.

There were four preconferences offered this year with ratings from 4.00 to 5.00, with an average rating of 4.35. David Lee King’s “Emerging Trends, 2.0, and Libraries” received the highest overall rating of the group.

OTHER CONFERENCE EVENTS

The Phoenix conference featured some returning and some new special programming events. The user group sessions averaged a 3.72 rating and the informal discussion groups...
averaged a 3.78 rating. The majority of respondents would like to continue both types of sessions. The speed dating session to meet publishers rated 3.70. The majority of respondents (57.6%) were uncertain if this session should be continued in the future, 34.7% indicated that it should be continued, and 7.6% that it should not. The First-Timers/Mentoring Reception rated a 3.93 with strong support for continuing this event in the future. The brainstorming session received a rating of 3.77. Sixty percent of respondents support continuing this event in the future. Comments indicate a need for better advertising of the session, including announcing the topic beforehand. The business meeting rated a 3.65. Finally, a new session called “Meet the Board Members” received a 3.47 rating and majority (65%) support for its continuation at future conferences. Comments indicated that it could have been better publicized and its purpose explained.

**RESPONDENT DEMOGRAPHICS**

As in past years, academic library employees represented the largest group (73.2%) of respondents. This includes university (196), college (37), and community college (6) librarians. Responses from the vendor and publisher community, including subscription vendors (12), publishers (12), book vendors (3), database providers (2), automated systems vendors (1), and binders (1), comprised 9.5% of the total respondents. Attendees from specialized libraries, including medical (9), law (10) and special or corporate libraries (7) made up 8% of respondents. Other types of institutions included government, national, or state libraries (4.3%); public libraries (1.5%); library networks, consortia, or utilities (0.6%); students (0.6%); and those selecting “other” (2.1%).

Respondents were asked to describe their work, selecting more than one category as applicable. The largest respondent groups identified themselves as serials librarians (47.7%), electronic resources librarians (36.3%), acquisitions librarians (30.5%), and catalog/metadata librarians (27.7%). Collection development librarians comprise 17.2% of respondents, technical services managers make up 15.1%, and licensing/rights management positions constitute 14.8%. All other categories were selected by fewer than 10% of respondents.
When asked for their amount of serials-related experience, nearly half (48%) are in the first decade of their serials careers, including those with less than a year (11), 1-3 years (34), 4-6 years (46), and 7-10 years (66). Those with 11-20 years experience comprise 25% of respondents and those with more than 20 years comprise 27%.

Most were repeat NASIG attendees: 39% of respondents had attended 1-5 previous conferences, 21% had attended 6-10, 11% had attended 11-15, 6% had attended 16-20, and 3% more than 20. First-time attendees represented 20% 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.
Our new president, Jill Emery, is head of acquisitions at the University of Texas Libraries in Austin. She has lived in Texas almost all of her life, having graduated from UT’s information school and having previously held positions at the University of Houston, the University of Texas, Arlington, and Texas Southern University.

Jill told me she was actually a bit down about her career prospects after graduation because the academic library job market was not very promising at that time. Participating in the NASIG conference bolstered her spirits, erased doubts about her career choice, and generated interest in becoming involved in the organization.

The 1995 conference at Duke was NASIG’s 10th anniversary and we had a cake to celebrate, among other special events. Jill remembers spending some one-on-one time with October Ivins, NASIG president at the time, who became a valuable mentor. October was about to embark on a PhD program at UT Austin, and Jill was finishing her MLS there. They had lots to talk about, especially comparing notes on the library school!

Jill believes her involvement in NASIG has given her a broader perspective of librarianship and the opportunity to make some really good contacts. She has a wide network of colleagues she can tap into when she needs others to work on projects with her.

In some organizations, the president or chair has a theme for their presidency, and while some of the earlier generation of presidents simply wanted to survive the year without a major disaster, Jill has some definite ideas about what she’d like to accomplish this year. She’d like to see NASIG build relationships with other organizations, particularly ER&L (Electronic Resources & Libraries) and SSP (Society for Scholarly Publishing). All three have important roles to play in the field, each with a somewhat different focus. NASIG should not feel threatened by any of these--there is room for all!

ABOUT LIBRARIANSHIP
Jill told the story in other interviews about being one of the “geeky” kids helping out in the library during elementary and junior high school. She found it was a good way to get to read *Cricket*, *National Geographic*, and *Ranger Rick* before everyone else did.
Jill’s story about how she became a librarian is not unusual. She had been working in the library during her undergraduate years and thought she’d be a technical writer. The job market for writers was pretty tough, and her colleagues in the library where she got a job after college encouraged her to go to library school because she “cared too much” about the library. So she went to library school, won a NASIG Conference Student Grant award, and the rest, as they say, is history!

In previous interviews, Jill stated that she viewed librarianship as an interim step before doing something else. Yet, thirteen years later she’s still a librarian. She still believes librarianship is an interim career for her, but she even now isn’t sure what else she’d like to do. Jill is very comfortable with what she’s doing now, nonetheless she doesn’t envision staying with it for the rest of her life.

PERSONAL STUFF
I noted from reading other interviews with Jill that she likes to read mysteries and had been reading Japanese mystery novels. She has moved geographically onto the Asian continent and is reading Russian mysteries by Boris Akunin. One series is Erast Fandorin set in late czarist times; another is with Sister Pelagia.

A couple of friends who are food sociologists have sparked her interest in the economies and sociology of food culture so she has begun reading books such as The Sushi Economy: Globalization and the Making of Modern Delicacy. It’s about how tuna grew from a cat food ingredient to a major delicacy.

Jill used to have a blog but it’s on hiatus. She does read a number of other folks’ blogs. I don’t know how she fits all of this into an already full workday, but here’s a list of the sites she tries to follow:

Peter Brantley (executive director, Digital Library Federation)
http://blogs.lib.berkeley.edu/shimenawa.php/

Karen Coyle (mostly on RDA)
http://kcoyle.blogspot.com/index.html

The Blog Lific (Peter McCracken)
http://blog.serialssolutions.com/

Sivacracy.net (Siva Vaidhyanathan)
http://www.sivacracy.net/

Scholarly Kitchen (Society for Scholarly Publishing)
http://scholarlykitchen.sspnet.org/

Library Web Chic (former colleague Karen Coombs)
http://www.librarywebchic.net/wordpress/

T. Scott (T. Scott Plutchak)
http://tscott.typepad.com/tsp/

Jill does find time for fun on occasion and enjoys an eclectic taste in music. Due to time constraints she has to be more selective in the live music events she attends, and she particularly enjoys smaller venues. In March each year, Austin hosts South by Southwest (SXSW, Inc.), a Music and Media Conference. Jill says this is a great place to see bands you like in smaller venues or at odd times. She also goes to see friends play live shows. She also tries to support her friends who are artists by attending their shows and purchasing some of their works.

Jill bought a house in Austin with a big yard about a year ago and has been somewhat successful trying to get a garden going. The hot, dry conditions have minimized her tomatoes and okra plantings, and I suspect the remnants of Hurricane Edouard were too little, too late to perk up her plants.

Jill was about to embark on a top-secret site visit for the 2010 conference with Joyce Tenney and Rick Anderson. I’m sure we’ll hear more about that visit in future board minutes or via the NASIG website. That will be NASIG’s 25th anniversary so it has to be a very special venue!
OTHER NASIG NEWS

CONFERENCE REGISTRATION WINNER ANNOUNCED
Lori J. Terrill, Evaluation & Assessment Committee Chair

The Evaluation & Assessment Committee is pleased to announce the winner of the drawing for a free conference registration. Marc Conrad of the Chicago Public Library was selected at random from among those who submitted an online evaluation form for the 2008 NASIG conference. Congratulations Marc!

The committee would like to thank everyone who took the time to fill out the online conference evaluation form. Your input is vital to the success of future NASIG conferences!

LSOC SEEKS NEW AMBASSADORS
Marcella Lesher, Co-Chair

The NASIG Library School Outreach Committee is seeking volunteers to serve as ambassadors to all ALA-accredited library schools. Part of our charge is to “foster strong relationships with library science schools and recruit the next generation of serials specialists.”

Currently, we have ambassadors working with the University of Texas at Austin, Louisiana State University, Indiana University, Dominican University, the University of Illinois, the University of Arizona, and the University of Washington.

Ambassadors can play numerous roles including promoting the NASIG awards, identifying NASIG colleagues who might serve as mentors or guest lecturers, and/or recruiting for NASIG.

If you are interested in being an ambassador, please contact either Marcella Lesher (mlesher@stmarytx.edu) or Sarah Sutton (sarah.sutton@tamucc.edu). We can provide you with further guidelines and connect you with a current ambassador to find out more about the program. Even if you would like to work with one of the schools already served by an ambassador, we would like to hear from you. As ambassadors cycle out of the program, we’d love to know who else might be available to serve.

We have set up a networking site for our ambassadors so that they can exchange ideas and information as well.

2007 NASIG CONFERENCE PROCEEDINGS NOW AVAILABLE IN JOURNAL FORMAT!
Carol Ann Borchert and Buddy Pennington, Co-Editors

“Place Your Bets in Kentucky: The Serials Gamble” has been published by Taylor & Francis as volume 54, no. 1-4 of The Serials Librarian. Edited by Carol Ann Borchert and Buddy Pennington, the Proceedings provide a written record of the sessions presented at the conference, which took place May 31 through June 3, 2007, in Louisville, Kentucky. The Proceedings include summaries of all sessions and includes a listing of conference registrants by name and affiliation. If you were unable to attend, check out what you missed!

Electronic versions of the articles are also available to NASIG members on the NASIG website. From the homepage, you can navigate to the 2007 Proceedings through the Annual Conference or Publications tab. The direct URL is http://www.nasig.org/conference_proceedings/2007.cfm.

The practice of publishing a monograph version has been discontinued and the Proceedings will now only be printed as journal issues of The Serials Librarian.
The co-editors wish to thank all speakers and recorders who made this published version of the 2007 NASIG Conference Proceedings possible. Your important contribution to these Proceedings is greatly appreciated!

PUBLICIST DUTIES SHIFT TO PUB/PR COMMITTEE
Rick Anderson, Publications/Public Relations Board Liaison

Now that the NASIG past president is charged primarily with securing organizational sponsorships, the role of NASIG publicist will be filled by a member of the Publications/Public Relations Committee. The publicist manages and distributes publicity items about NASIG to publications, listervs and other outlets, helping to ensure that timely and accurate information goes where it will most effectively help NASIG achieve its goals.

We are pleased to announce that Marilyn Carney, serials services librarian at Wake Technical Community College, has agreed to serve a one-year term as the NASIG publicist, effective immediately. Her email address is mmcarney@waketech.edu. Our thanks to Marilyn for her willingness to fill this important role!

EVALUATION & ASSESSMENT COMMITTEE ANNUAL REPORT
June 2008
Lori Terrill, Chair

Committee members (2008): Lori Terrill, chair (University of Wyoming), Ann Doyle Fath, co-chair (Getty Research Institute), Carole Bell (Temple University), Jana Brubaker (Northern Illinois University), Sarah Corvone (Harvard Business School), Susan Davis (State University of New York, Buffalo), Janice Lindquist (Rice University), Martha Spring (Loyola University of Chicago), Christina Torbert (University of Mississippi), board liaison: Alison Roth

In January the committee membership changed over as the committee is appointed for the calendar year. The committee reviewed the standard questions asked on the evaluation forms each year and consulted with PPC, CPC, SSC, and the Executive Board in order to identify any needed updates to those questions. Low response rates last year for preconference and poster session evaluations were discussed. The committee decided to incorporate the separate forms for those sessions into the main conference evaluation form in an effort to increase the response rates.

In April the committee chair was trained on the ArcStone survey software. Due to some limitations with the software, the Executive Board approved the committee’s recommendation to continue to use SurveyMonkey for the evaluation forms in 2008. E&A will work with Donnice Cochenour and ArcStone on enhancements to the survey software so that it can be used in 2009.

In May the committee prepared the evaluation form. This year, the evaluation form will be online only and individuals filling out the evaluation will be eligible for a drawing to receive a free conference registration in 2009. A link to the form will be available on the conference website and announcements will be made via e-mail to remind conference attendees to fill it out. The due date for evaluations is July 1, 2008.

In late summer, the committee plans to develop a survey aimed at all NASIG members (not just those who attended the Phoenix conference) regarding conference attendance/non-attendance.
Introductions of the committee were made.

CONSER REPORT & LC REPORT
Les Hawkins (CONSER) and Steve Shadle (University of Washington)

This year marks the 35th anniversary of the CONSER program and the 10th anniversary of SCCTP.

UCLA is revising the Basic Serials Cataloging Workshop, which includes information about the CONSER Standard Record. The hope is to also have this program available online, possibly as a PowerPoint presentation. The Serials Holdings course is also being revised with the help of the AMIGOS network. The University of California has created a CONSER funnel – the first bibliographic funnel in PCC, comprising of 10 campuses.

The CONSER Operations Committee meeting was held in May, marking one year since the implementation of the CONSER Standard Record. A monitoring group is being formed to evaluate how the standard is being used. The committee is seeking a reemphasis on the principles of the standard, such as simplifying decision making and keeping a focus on user needs.

Les continued with the Library of Congress report, on behalf of Regina Reynolds, who was unable to attend this forum. LC is undergoing reorganization of its Acquisitions and Bibliographic Access Divisions. Serials work is distributed along based on subject matter. The work done by the National Serials Data Program (NSDP) will in the near future be done by the ISSN Publisher Liaison team. In preparation for these changes, and for the implementation of the linking ISSN, NSDP has implemented some new automation for ISSN work and doing record cleanup.

Steve Shadle expanded on ISSN-L using slides provided by Regina before the conference. The purpose of the ISSN-L, or linking ISSN, is to serve as a collocating, medium-neutral identifier for all versions of a serial which can be used in link resolvers and other finding aids. MARBI has approved new subfield coding for it, but this hasn’t been implemented by OCLC or any ILS vendors. Equivalence tables will be provided in August at no charge from the International ISSN Centre that will allow libraries and other agencies to update their records with this new identifier.

CC:DA, MARBI LIAISON REPORT
Kevin Randall (Northwestern University)

Kevin Randall gave a number of updates related to Resource Description and Access (RDA), the new developing cataloging code. CC:DA has been working on a response to the RDA draft from December and other JSC documents. RDA will have an option to only show core elements. Most proposals for the reorganization of RDA were not accepted since it's too close to the publication date. The corporate body main entry rule has been reinstated. JSC liked the proposed workflow feature for RDA, allowing for customization. The biggest issue is timing – the Committee of Principals wants to publish RDA in early 2009, with the content done by the end of July 2008. However, the schedule has been adjusted for review in the fall 2008 and the submittal of the final text in April 2009. There will be a very limited call for comments.

ALA Publications has stated that the availability of print versions as well as pricing information is unknown at this point. A demo of RDA will be available at IFLA in August and a preconference on RDA will happen next year at ALA.

The Rare Serials Task Force will issue its report in July 2008.
“ON THE RECORD: REPORT OF THE LIBRARY OF CONGRESS WORKING GROUP ON THE FUTURE OF BIBLIOGRAPHIC CONTROL.”
Diane Boehr (NLM)

Diane was the Medical Library Association representative to the Library of Congress Working Group on the Future of Bibliographic Control (LCWG). The LCWG was formed in response to LC’s series tracing decision. She gave her highlights of being on the working group and the reactions to the final report.

In three meetings around the country, 350 people attended these presentations. Seventy-five written comments were submitted. On the draft of the report, 135 pages of comments were submitted. The recommendations of the working group were all unanimous. The overall conclusion of the working group's report is that improvement is needed by all sectors of the library community.

The serials community is ahead of other communities by our use and creation of metadata standards. OCLC is experimenting using ONIX information to create MARC records. In the sciences, computational indexing works really well for their needs.

The working group would like more people involved in RDA testing – volunteers should be able to enlist in September 2008. The RDA time frame has been adjusted to May–November 2009. The LCWG had recommended that work on RDA be suspended to allow for more testing, however it was felt that too much work has already gone into RDA to allow for this.

Diane emphasized that the standards future is here and we need to catch up. The community needs to start taking action – ALCTS has started with its "10 Actions for ALCTS." ALCTS should also be able to influence OCLC in these areas.

Additionally, better communication needs to occur within and without LC. We all need to be taking action.

“FRBR FOR SERIALS: ROUNING THE SQUARE TO FIT THE PEG”
Adolfo Tarango (Univerisity of California, San Diego)

Adolfo has been thinking and talking about FRBR for serials for several years. Everett Allgood's paper, “Serials and Multiple Versions, or the Inexorable Trend Toward Work-Level Displays,” Library Resources & Technical Services (July 2007, 51:3) was an inspiration for his proposal, as was Frieda Rosenberg's concept of a "superwork." Adapting their ideas, he has developed the concept of a "work segment": all expressions and manifestations of a serial work issued under a specific title. Notes, variations in title and subject headings from records created for different manifestations would all be recorded on the unified record. Recording all ISSN's in bibliographic records will help A & I services tremendously. National Library of Medicine already catalogs like this, according to Diane Boehr.

In order for this concept to work, it would also require the creation of a Serial Work Authority Record. 670/675 notes might be needed in the authority records.

Adolfo argued that this is a good way to build upon the records others have created and maximize access to content.

Questions and discussion covered the problems of confusing publication history with holdings data; navigating gaps in the chain of records when a library doesn’t hold every intervening title; whether the aggregated record couldn’t best be created by the system on the fly rather than being hand created by catalogers.

SERIALS STANDARDS UPDATE FORUM
ALA ANNUAL CONFERENCE
SUNDAY, JUNE 29, 2008
Angela L. Dresselhaus, Indiana University, Recorder

The Serials Standards Update Forum at the 2008 ALA annual conference held in Anaheim California featured three speakers. The ISSN-L was discussed by Françoise Pellé of the International ISSN Centre and Steve Shadle of University of Washington, on behalf of Regina Reynolds. Don Chvatal wrapped up the forum with a discussion on institutional identifiers.
Françoise Pellé and Steve Shadle began the forum by providing an update on the progress of the ISSN-L. The revision of the International Standard ISO 3297 included a provision for a new ISSN that will serve as a linking number for various formats of a single resource. Separate ISNNs are assigned to various formats for ease of inventory management by content creators. The new ISSN-L will allow for the collocation of each of the various formats.

The ISSN-L will be a separate data element and will be recorded as a subfield “f” in the 022. A table providing relationships between all ISSN-L and ISSN will be provided free of charge on the ISSN Centre web site http://www.issn.org/. Implementation is planned for August 2008. The development of the ISSN-L has also resulted in the statement that an ISSN is a unique identifier, clarifying that each medium should receive a separate ISSN and the ISSN-L will be the mechanism for collocating a title.

Following the presentation on ISSN-L, Don Chvatal, president of Ringgold, Inc., spoke about institutional identifiers. The institutional identifier, “Ringgold Identifier” is created for institutions that subscribe to academic journals and is used explicitly by publishers and vendors to identify their customers. The identifier is intended to simplify identification and foster clear communication between publishers, vendors, and subscribing institutions. Ringgold, Inc. has developed a Web service, OpenIdentify, which facilitates searching their database of over 100,000 Ringgold Identifiers. A free version provides a searching mechanism for the database that will display institutions and the hierarchy of the organization. A subscription-based product will provide additional data.

A participant in the forum noted that the library community still needs identifiers for publishers. There was a consensus in the forum that publisher identifiers were needed, but it is unclear if this will be incorporated into Ringgold’s products. The website for this service is www.openidentify.com, but you will need to register to view and search their website.

Don Chvatal’s power point presentation is hosted on the ALA Conference Materials Archive wiki at the following location: http://presentations.ala.org/index.php?title=Image: ALA_Anaheim_Chvatal_I2_20080629.pdf.

ASSOCIATION OF LEARNED AND PROFESSIONAL SOCIETY PUBLISHERS ANNOUNCES SHORTLISTS FOR BEST NEW JOURNAL AND PUBLISHING INNOVATION AWARDS

The judges for the 2008 ALPSP Awards have announced the finalists for this year’s ALPSP Awards. The winners will be announced on 11 September at the ALPSP International Conference Dinner at Beaumont House (www.alpspconference.org).

ALPSP AWARD FOR BEST NEW JOURNAL 2008 SHORTLIST

- ACS Nano, (http://pubs.acs.org/journal/ancac3?cookieSet=1) published by American Chemical Society
- Journal of Informetrics, (http://www.elsevier.com/wps/find/journaldescription.cws_home/709551/description#description) published by Elsevier

ALPSP AWARD FOR PUBLISHING INNOVATION 2008 SHORTLIST

- CrossCheck (http://www.crossref.org/crosscheck.html) from the CrossRef/iParadigms Partnership
- OECD.Stat (http://titania.sourceoecd.org/vl=3824216/cl=17/nw=1/rpsv/dotstat.htm) from the Organisation for Economic and Co-operation Development
- Ringgold Institutional Identifier (http://www.ringgold.com/identify/cfm/si_pd.cfm?pid=24) from Ringgold Ltd.
- Routine authoring and publication of enhanced figures (http://journals.iucr.org/services/enhancedfigures.html) from the International Union of Crystallography

ABOUT THE ALPSP AWARDS

PANEL OF JUDGES
Richard Gedye, research director, Oxford Journals (chair)
Geoffrey Bilder, director of Strategic Initiatives, CrossRef
Sue Corbett, general manager for Medicine, Wiley-Blackwell
Mark Ware, director, Mark Ware Consulting
Hugh Look, senior consultant, Rightscom
Hazel Woodward, university librarian & director of Cranfield Press

ALPSP Award for PUBLISHING INNOVATION - in recognition of a truly innovative approach to any aspect of publication.

Applications are judged on their originality and innovative qualities, together with their utility, benefit to their community and long term prospects. Any area of innovation is eligible - it could, for example, be a novel type of print or online publication or service, or even a radically different approach to a marketing campaign.

ALPSP Award for BEST NEW JOURNAL - open to any journal launched within the past 3 years. The judges consider four main aspects of the journal and its launch: market research, editorial strategy, marketing and commercial success. The journal should include a substantial number of peer-reviewed articles.

ABOUT THE ALPSP INTERNATIONAL CONFERENCE
2008 sees a new conference for ALPSP members and everyone involved in scholarly publishing. It’s the perfect opportunity to discuss issues of common interest and to share information and best practice in an informal setting. There are sessions for books and journals publishers, with keynotes from Timo Hannay (Nature Publishing Group) and Paul Evans (Elsevier). The conference begins on the Wednesday evening with a cocktail reception and buffet and the guest speaker at the Awards Dinner is Ben Goldacre, author of The Guardian’s ‘Bad Science’ column.

FURTHER INFORMATION
For further information, please contact Lesley Ogg (events@alpsp.org; +44 (0)1245 260571) or Nick Evans (nick.evans@alpsp.org; +44 (0)8789 2384).

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.]

At five entries this quarter’s bibliography is limited in quantity but certainly not in quality. Thank you, Wayne, Sarah, and Christopher for your contributions.


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.]

LISA HARRINGTON KURT has recently accepted a position as head of Serials and Electronic Resources at the University of Nevada, Reno (UNR). Kurt won't be starting in that position until August 20, 2008, and is currently in the middle of moving to Reno from Boston, where she served most recently as public services librarian at the Massachusetts College of Art and Design. As Kurt says, "I'm thrilled to have the opportunity to work in this new position at the UNR Libraries, and to be back in serials and e-resources. UNR Libraries seems to be an exciting and forward-thinking institution and I'm looking forward to joining them soon."

While she's not new to Belmont University, DAWN STEPHEN is new to NASIG. Formerly Belmont’s periodicals librarian, Stephen has served as collection management librarian more than one year. According to Stephen, "My acceptance of the collection management librarian position has resulted in a merging of my periodicals responsibilities with managing all functions of serials, cataloging, and acquisitions. A friend recommended NASIG to me and the focus of the organization is clearly very applicable to my responsibilities." This column would like to note, that's a very good friend. Stephen may be reached at:

Lila D. Bunch Library
1900 Belmont Blvd.
Nashville, TN 37212
Tel: (615) 460-5496
stephend@mail.belmont.edu

JEANNETTE SOMMER WARD with the following press release:

Ward has been working in libraries since 1975, when she was an acquisitions searcher. She received her MLS degree from Rutgers University and took her first professional library position as head of the Serials Department at the Rider College (now Rider University) library in Lawrenceville, NJ. One of the unique facets of Ward's very full and productive career is the fact that she has been a driving force in not one, not two, but three complete library management system conversions, beginning with one at Rider College and then two more, twenty years apart, at the UCF Libraries where she began working in 1984 as the technical services librarian.

Anne Marie Allison, director of Libraries (UCF, 1983-1997), remarked, “Jeannette has always been ahead of us with technology. She announced new trends and developments long before the acknowledged gurus introduced them.”

In 1986 Ward was appointed head of the UCF Serials Department, later serving as the department head for the combined Serials and Acquisitions & Collection Development departments. In summer 2005, Ward was appointed the first associate director for Collections & Technical Services.

Throughout her career, Ward has been an active member, presenter, and leader of several professional organizations at the national, state, and local levels, including the
Association of College and Research Libraries (ACRL), North American Serials Interest Group (NASIG), American Library Association (ALA), and Florida Library Association. She has also presented programs at EDUCOM and the Charleston Conference.

Ward received UCF’s Excellence in Librarianship award presented at the university-wide Founders' Day Convocation. For her more than twenty years of service in the library profession, ten or more of which having been served at the UCF Libraries, she will also receive the UCF Libraries Lifetime Service Award.

In addition to her technological acumen Ward has the hands of an artist and has been a doll maker and accomplished sewer for many years. She hopes to fill her retirement with time spent traveling with her husband George and enjoying quality time with her daughter, son, and five granddaughters.

---

**CALENDAR**

Lillian DeBlois, Calendar Editor

[Please submit announcements for upcoming meetings, conferences, workshops and other events of interest to your NASIG colleagues to Lillian DeBlois, lillian.deblois@gmail.com.]

---

September 3-5, 2008
*Society for Scholarly Publishing*
Top Management Roundtable
“Constant Content and Autonomous Authors - The New Role of Publishers in the Era of Empowered Authors”
Philadelphia, Pennsylvania
https://www.sspnet.org/Events/Meetings_and_Seminars/2008_TMR/spage.aspx

September 17, 2008
*NASIG*
Fall Executive Board Meeting
Asheville, North Carolina

September 29-October 24, 2008
*Association for Library Collections & Technical Services*
Online course
"Fundamentals of Acquisitions Web Course"
http://www.alaa.org/alaa/alcts/education/alctsccevents/events.cfm

October 20-22, 2008
*Internet Librarian*
Monterey, California
http://www.infotoday.com/conferences.shtml

November 5-8, 2008
*Charleston Conference*
“The Best of Times, the Worst of Times”
http://www.katina.info/conference/

December 5, 2008
*ACRL/NY Annual Symposium*
“The 21st Century Librarian: Targeting the Trends”
Baruch College
New York, New York
http://acrlnysymp2008.wordpress.com/

January 22, 2009
*NASIG*
Executive Board Meeting
Denver, Colorado

January 23-28, 2009
*American Library Association*
Midwinter Meeting
Denver, Colorado
http://www.alaa.org/alaa/conferencesevents/upcoming/midwinter/home.cfm

February 9-12, 2009
*Electronic Resources & Libraries*
Los Angeles, California

March 20, 2009
*NASIG UnConference*
Manhattan, Kansas
http://nasigunconference2009.wetpaint.com/

March 27, 2009
*North Carolina Serials Conference*
“Are You Ready? New Opportunities in Challenging Times”
Chapel Hill, North Carolina
http://www.nccuslis.org/conted/conted.php

March 30-April 1, 2009
United Kingdom Serials Group
Annual Conference and Exhibition
http://uksg.org/event/conference09

April 2-3, 2009
Association for Library Collections & Technical Service
“Basic Collection Development and Management”
Buffalo, NY
http://www.ala.org/ala/mgrps/divs/alcts/confevents/upcoming/workshop/index.cfm

April 6-May 1, 2009
Association for Library Collections & Technical Services
Web Course
“Electronic Resources & Acquisitions”
http://www.ala.org/ala/mgrps/divs/alcts/confevents/upcoming/webcourse/foelectronic.cfm

April 8, 2009
National Information Standards Organization
NISO Webinar
“KBART and the OpenURL”
http://www.niso.org/workrooms/kbart

April 13-May 8, 2009
Association for Library Collections & Technical Services
Web Course
“Fundamentals of Acquisitions”
http://www.ala.org/ala/mgrps/divs/alcts/confevents/upcoming/webcourse/foacquisitions.cfm

May 4-29, 2009
Association for Library Collections & Technical Services
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/COUNTER Webinar
“COUNTER: A How-to Guide”

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

May 13-14, 2009
Association for Library Collections & Technical Services
“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
31st Annual Meeting
Baltimore, MD
https://www.sspnet.org/Events/spage.aspx
COPYRIGHT AND MASTHEAD

The NASIG Newsletter is copyright by the North American Serials Interest Group and NASIG encourages its widest use. In accordance with the U.S. Copyright Act's Fair Use provisions, readers may make a single copy of any of the work for reading, education, study, or research purposes. In addition, NASIG permits copying and circulation in any manner, provided that such circulation is done for free and the items are not re-sold in any way, whether for-profit or not-for-profit. Any reproduction for sale may only be done with the permission of the NASIG Board, with a request submitted to the current President of NASIG, under terms which will be set by the Board.

The NASIG Newsletter (ISSN: 1542-3417) is published 4-5 times per year for the members of the North American Serials Interest Group, Inc. Members of the Editorial Board of the Newsletter are:

Editor-in-Chief: Kathryn Wesley, Clemson University
Blog Editor: Jennifer Duncan, Utah State University
Copy Editor: Kathy Kobyljanec, John Carroll University
Columns Editor: Kurt Blythe, University of North Carolina, Chapel Hill
Conference/Calendar Editor: Lillian DeBlois
Submissions Editor: Naomi Young, University of Florida
Profiles Editor: Susan Davis, University of Buffalo
PDF Production Editor: Sharon Heminger, JSTOR
Board Liaison: Char Simser, Kansas State University

In 2008, the Newsletter is published in March, June, September, and December. Submission deadlines (February 1, May 1, August 15, and November 15) are approximately 4 weeks prior to the publication date. The submission deadline for the next issue is:

November 15, 2008
NO LATE SUBMISSIONS WILL BE ACCEPTED

Send submissions and editorial comments to:
Kathryn Wesley
Clemson University Libraries
Box 343001
Clemson, SC 29634-3001
Phone: (864) 656-5171
Fax: (864) 656-3025
Email: kwesley@clemson.edu

Send all items for "Title Changes" and "Citations" to:
Kurt Blythe
Email: kcblythe@email.unc.edu

Send all items for the Calendar to:
Lillian DeBlois
Email: lillian_deblois@gmail.com

Send inquiries concerning the NASIG organization, membership, and change of address information to:
Joyce Tenney
University of Maryland, Baltimore County Library
1000 Hilltop Cir.
Baltimore, MD 21250
Phone: (410) 455-3594
Fax: (410) 455-1078
Email: tenney@umbc.edu

NASIG address:
NASIG, Inc.
PMB 305
1902 Ridge Rd.
West Seneca, NY (USA) 14089-5305
URL: http://www.nasig.org