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**PRESIDENT'S CORNER / Susan Davis**

It has just dawned on me that for the very first time in my life, I am responsible for writing an entire column! I do have experience editing a column, which mainly consists of convincing others to do the writing! But I now have the opportunity and responsibility to write five columns over the course of this year. Where to begin? This column will be something of a hodgepodge, combining a discussion of answers to questions which came up at the 1997 conference, then going on to tackle the important topic of leadership within the organization.

*Curiosity and a Cat*

Some of you might be wondering if NASIG has a warehouse of crystal *paperweights* that we plunder right before the conference. Or maybe we have stock in the manufacturer. Neither. After several years of regretting that we did not have any extra paperweights to use for such special awards as the Pink Cadillac Good Sport award, the clever folks you elected to the Board had the bright idea of ordering a dozen or so extras that we keep on hand. When the need arises, we are prepared. The paperweights have the NASIG logo etched on them, and the retiring Board members have their names engraved. I do not have one of my own yet, so I cannot be more exact in my description.
Euchre, what on earth is that? (pronounced "you ker") Those of you who checked out the exciting activities at the late night socials at our recent conference saw two groups playing cards. One group stuck with hearts, but yours truly and a few other brave souls (June Chressanthis, Ladd Brown, David Winchester, and numerous onlookers) organized some hands of euchre. I did some Net research on the origins of the game and learned a few things. First, it was developed either in Pennsylvania Dutch country or in the Alsace region of France (near the German border). The Europeans play a slightly different version than their North American cousins. Some people keep scores with 6's, which I didn't understand very well since a match goes to 10. The real point is, if you like to play cards, especially when you don't need a full deck (you only use 24 cards), then check out the card games at the late night socials in Boulder.

Who is Peaches? Peaches is my cat, a petite Siamese, about half the size of Jimmie Dale. She is approaching her 13th birthday and is not terribly concerned with such mundane issues as the day to day running of NASIG. She focuses on more important issues, such as, when do I get lap time? or how dare you disturb me while I'm on your lap? Peaches has her priorities pretty well defined, her goals are clear cut, and she goes after them with some pretty good "reows!!!" Peaches has provided the perfect segue to the second portion of this column, a few thoughts on leadership.

Leadership

I have recently attended a three-day training session based on the Seven Habits of Highly Effective People. The university is making a concerted effort to develop personal and interpersonal effectiveness as we approach the new millennium. One of the habits focuses on personal leadership, another on interpersonal leadership. While I was attending this training, I kept thinking: "How could I use this training in NASIG? How has NASIG already benefitted from effective leaders of the past? How can NASIG develop effective leaders for the future?"

What is leadership? The dictionary is not very helpful in my view — something that leads or a person with commanding authority or influence. These definitions do not readily apply to NASIG. Leadership in NASIG means working with a large number of highly motivated people to further the purpose, programs and mission of the organization. There are already a number of committees and activities in place. The NASIG President is akin to a symphony conductor or a master chef who is responsible for the overall coordination of the performance or presentation of the meal. The Executive Board functions as assistant conductors or chefs to help the President make sure all the activities are moving along as they should and that everyone is on the same wavelength. Committee and task force chairs coordinate the activities of their particular groups. Our overall direction is provided by our strategic plan, an excellent roadmap to the year 2000. Communication and coordination are major skills needed particularly by the President and the Board as well as committee chairs.

All right, you say, it sounds like NASIG is on the right track, why be concerned about leadership in the future? The Nominations & Elections Committee has done an excellent job providing the membership with strong slates of candidates for our annual elections. However, it has not been easy for them to identify qualified and willing candidates for the highest offices. Elected office in NASIG does require a great deal of personal commitment, but you also need to have confidence in your abilities and skills to accomplish the ambitious agenda we have set for the organization.

The previous President's Corner addressed the need for professional diversity on the Board. NASIG needs to make sure our commercial segment members have opportunities for professional growth and development within the organization. Many academics are encouraged and supported by their institutions because of tenure requirements.
We have jokingly referred to the "graying of the profession" as we see more folks opt for the comforts of a hotel room during the annual conference. NASIG has been very fortunate to maintain fairly stable membership numbers over the past several years, but take a good look around to see how many new and upcoming professionals are joining NASIG. Our vice-president, Steve Oberg, is the youngest to be elected to this office. It's a good start, but NASIG needs to take responsibility to ensure that there are more Steves in the pipeline.

NASIG also has a responsibility to the profession, with particular focus on serials. The Continuing Education Committee has begun a conference mentoring program as one contribution. We all know that the stresses and demands at our workplaces leave us with less and less time to really think, ponder, develop and grow. Now granted we can all assess our abilities to cope in a crisis mode based on far too much experience, but wouldn't it be nice to learn something that may actually diminish the number of crises?

To summarize, NASIG needs to be proactive in developing leadership within our membership as a matter of self-preservation. There would also be benefits to members on a personal level as well as to the serials profession as a whole. Watch for some programs along these lines at our next conference, and give careful consideration to your own leadership skills and interests and those of your fellow members as we begin our next election cycle.

Mea culpa, mea culpa, mea culpa. I am here to admit a terrible crime of omission. In my last president's corner, I neglected to include Jim Moul's name in the list of new members-at-large on the NASIG Board. This is clear proof that it was time for me to hand the gavel to Susan Davis. Forgive me, Jim.

Beverley Geer
The Past It President

NEWSLETTER CHANGES

With this issue the Newsletter Board welcomes two new members: Naomi Young and Regina Beach. Together they will take on the production that had been single-handedly done by Steve Savage. Naomi will do print production, and Regina will be responsible for our Web version. Steve Savage will remain on the board as our representative to the Task Force on Publications.
NASIG EXECUTIVE BOARD MINUTES

Date, Time: May 28, 1997; 8:20 a.m.-5:28 p.m. Place: Ann Arbor, Michigan

Attending:
Beverley Geer-Butler, President
Julia Gammon, Past President
Connie Foster, Secretary
Jean Callaghan
Ann Ercelawn
Kat McGrath

Susan Davis, Vice-President/Pres. Elect
Dan Tonkery, Treasurer
Eleanor Cook
Carol Diedrichs
Birdie MacLennan
Maggie Horn, Newsletter Editor

Guests: Incoming Board Members: Steve Oberg, Gerry Williams, Fran Wilkinson, Jim Mouw; 1997 Conference Planning Committee: Leighann Ayers, Tom Champagne, Judy Wilhelme; 1997 Program Planning Committee Co-Chairs: Karen Cargille, Christa Easton; Pat Wallace, 1998 Conference Planning Committee Co-chair; Tina Feick, Former NASIG President and Invited Guest

1.0 MINUTES

The minutes of February 13-14, 1997, were approved.

2.0 SECRETARY’S REPORT

2.1 C. Foster distributed the Board roster for revisions and corrections.

2.2 C. Foster compiled the following Board actions since the February meeting for inclusion with the minutes:

1. Agreed to delay final appointments of the Publications Program Task Force until late summer or early fall due to the time constraints of potential volunteers.

2. Decided to post non-NASIG conference events on a bulletin board (physical one), provide space near the registration area for flyers and announcements of other events, and create a section of the conference Web site for posting announcements about other events.

3. Agreed to publicize availability of hardbound back volumes of the NASIG conference proceedings in the NASIG newsletter, on NASIG-L and with flyers at the Ann Arbor conference. Reaffirmed NASIG’s policy not to provide membership mailing lists to outside groups; hence, the Board denied a request from Haworth Press for a mailing list.

4. Agreed to use NASIG's permanent mailing address as the return address on envelopes for elections and other membership voting issues to insure anonymity and recommended that the original mailing be clearly marked “Official Ballot” to alert members to dated, important contents.

5. Approved sending members of RC&M and Bylaws committees to the preconference on Web training and HTML.

6. Approved Horizon and Student Grant winners and requested that D&D list the recipients in the Membership Directory.

7. Forwarded the 1996 UNM NASIG list of student grant winners to Barbara Winters to accommodate her request for identifying potential candidates for library positions.

8. Approved printing 200 extra copies of the Membership Directory for new member packets and other requests.

9. In response to membership queries, asked ECC to establish an electronic form for new members on the public section of NASIGWeb.

10. In response to a request from RC&M and as part of the Board's interest in outreach to other library groups, approved financial support of $100 for the LACUNY meeting, May 16, 1997.
11. **Decided** to continue discussion of leadership development within NASIG and explore ways to encourage opportunities with emphasis on elected officers.

12. **Approved** the 1998 conference theme and call for papers: "Head in the Clouds, Feet on the Ground: Serials Vision and Common Sense."

13. **Confirmed** recognition of and awards to the Student Grant and Horizon recipients to occur on opening night.

2.3 C. Foster noted that the Professional Liaisons annual report and roster was submitted. At the request of Cheryl Riley, Database & Directory chair, the Board clarified the complimentary exchanges list for database accuracy.

2.4-5 C. Foster distributed a recent review of the 1996 NASIG Proceedings, as received by Haworth. A file of all reviews has been sent to the Archivist.

3.0 **TREASURER' REPORT**

3.1-2 D. Tonkery expressed appreciation for the opportunity to serve for four years as treasurer. He reported that conference income as of May 27, 1997, was $165,462.50, prior to all bills being paid. He observed that NASIG's cash position continues to grow. Two outstanding items are: 1) the transfer of funds into another investment account, which will depend on market conditions, and 2) transfer of duties to the new treasurer, which will occur after reconciliation of the May bank statement, and database transfer to occur by mid-June.

He further observed that from January-May 10, 1997, $19,319.42 out of $80,683 has been spent from the operating budget, which is on a calendar year. The operating budget, therefore, is on track and considerably under projected expenses with no outstanding bills.

3.3 D. Tonkery noted that membership as of May 1, 1997, is 1161 and that income is up from last year.

3.4 D. Tonkery asked that we issue Haworth an invoice in order to receive our publisher contract payment for the proceedings. He said that the Continuing Education Committee absorbed the $100 financial support of the LACUNY meeting.

3.5-6 D. Tonkery called attention to the "Guidelines for Financial Support," and "Guidelines for Expense Reimbursement" and mentioned Board reimbursement policies not stated in those guidelines.

**ACTION:** The Board recommended that G. Williams, S. Davis, and B. Geer review the financial guidelines documents and forms and that G. Williams consolidate them into one document if appropriate.

**DATE:** Prior to the October 24, 1997, Board meeting.

**ACTION:** Upon Board approval, mount these financial guidelines and forms on NASIGWeb with the current treasurer's address.

D. Tonkery mentioned that we have not yet received an invoice from AMIS for dues this year.

**DECISION:** The Board agreed to delay AMIS contribution until an invoice is received.

4.0 **1998 CONFERENCE PLANNING COMMITTEE**

P. Wallace reviewed the preliminary conference budget for 1998 which she and Wendy Baia, co-chair, had drafted. She also distributed travel brochures and campus information, discussed housing in the Kittredge Dormitory Complex, airport distance from Denver to Boulder (45 minutes), and altitude similar to Albuquerque’s.

5.0 **TASK FORCE REPORTS**

5.1 Program Planning Manual

S. Davis will determine the location of the disk for the Program Planning Manual and send it to C. Easton, who will develop the manual further based on her program planning experience. C. Easton will send a copy of the
latest version to C. Diedrichs, new liaison to PPC, and also a copy to the 1998 Program Planning Committee.

5.2 Conference Planning Manual
J. Callaghan has additional revisions for the Conference Planning Manual. S. Davis requested a new editor, and the Board decided that the liaison to the Conference Planning Committee is the appropriate person to serve in this capacity. Fran Wilkinson will be the new liaison. All suggestions and revisions should be sent to her effective immediately. S. Davis will contact ECC about a Web version of the manual.

5.3 TASK FORCE APPOINTMENTS PENDING

5.3.1 Archives Task Force
B. Geer presented the charge to the Archives Task Force with a progress report due to the Board Liaison by August 15, 1997, and a final report for the Board’s consideration by October 15, 1997. Members are: Teresa Mullins, chair; Jane Hedberg, Sarah Tusa, Ellen Greenblatt, B. Geer, liaison.

5.3.2 Publications Program Task Force
B. Geer presented the Publications Program Task Force charge with a progress report to the Board Liaison by August 15, 1997, and a final report for the Board’s consideration by October 15, 1997. The tentative list of members is: Ladd Brown, chair; Leslie Horner Button, Mary Beth Clack, Mary Fugle, Steve Savage, Maggie Rioux, and Carol Diedrichs, liaison. Final appointments will be confirmed during the summer.

5.3.3 Task Force to Study Cooperative Efforts
B. Geer distributed the charge of the Task Force to Study Cooperative Efforts, which involves not only NASIG and ALCTS-SS but other outreach. She has requested a preliminary report to the Board Liaison by October 15, 1997, and a final report for Board consideration by December 15, 1997. Members are: Michele Crump, chair; Mary Buttner, Betty Landesman, Pamela Morgan, Maria Schwartz, and Eleanor Cook, liaison.

6.0 SITE SELECTION

6.1 J. Callaghan shared preliminary cost estimates and other information regarding the following potential conference sites: 2000 at University of California, San Diego, and 2001 at Trinity University, San Antonio, Texas. She will continue to pursue these options and work around SLA/ALA dates.

6.2 J. Callaghan reported that sites for 1999 are still being explored. The dates must be June 10-13, 1999, to avoid conflict with other major conferences. C. Diedrichs and others commented that universities operating on a quarter system have scheduling conflicts. J. Callaghan will informally poll conference attendees for site suggestions for 1999.

7.0 CALENDAR

J. Gammon had the May 1997 edition of the NASIG Board Working Calendar for review. B. Geer will assume update responsibilities and investigate putting it on the Web.

8.0 1997/1998 COMMITTEE APPOINTMENTS

S. Davis distributed the 1997/98 committee appointments and made two liaison changes: S. Oberg will serve on Continuing Education and J. Mouw will be liaison for Regional Councils & Membership. S. Davis added that the appointment process utilized almost all of the volunteers who submitted forms. There are about 128 committee positions.

9.0 SISAC/Fritz Schwartz Award
(See the report under 13.2)

10.0 MEMBERSHIP MEETING PREVIEW

B. Geer discussed the agenda for opening night, business meeting, and the closing session.
11.0 CONFERENCE PLANNING COMMITTEE

L. Ayers, T. Champagne, and J. Wilhelme reviewed last-minute details, discussed souvenir pricing, and logistics of opening night events.

12.0 PROGRAM PLANNING COMMITTEE

K. Cargille and C. Easton noted their annual report and distributed a master list of program arrangements that provided the Board with detailed information.

13.0 COMMITTEE REPORTS

13.1 Archives
J. Gammon reported on the change in T. Mullins' work affiliation and her new address. (See also 5.3.1)

13.2 Awards & Recognition (A&R)
E. Cook announced that Horizon Award winner Tracy Remington would be unable to attend the conference because of a family emergency. She recommended that Tracy attend next year as a winner.

DECISION: The Board agreed that Tracy Remington will be invited to the 1998 NASIG Conference at NASIG's expense as a Horizon winner.

ACTION: A&R will notify T. Remington prior to the 1998 conference.

After additional discussion with SISAC representatives for a jointly sponsored tribute to Fritz Schwartz, E. Cook presented a proposal from an A&R subcommittee that a scholarship be established for a paraprofessional to attend library school. SISAC will make a financial contribution and prepare a biographical sketch about Schwartz for the award process. Details will be worked out between SISAC and NASIG through A&R concerning selection, deadline, presentation, etc.

ACTION: As a jointly sponsored NASIG-SISAC award in honor of Fritz Schwartz, the Board approved the concept of an education scholarship in the amount of $2500 for a paraprofessional to attend library school.

DATE: A&R and SISAC will work out the details as soon as possible so that an award can be made at next year's conference.

13.2.1-2
E. Cook presented a proposal from A&R subcommittee for an international outreach grant in honor of Marcia Tuffle, who will retire from the University of North Carolina, Chapel Hill, this summer.

ACTION: The Board approved the concept of a Marcia Tuffle International Grant, pending further details from A&R.

DATE: Development of application form & refined description by the October 1997 Board meeting.

The Board had further general discussion concerning the establishment of a separate NASIGWeb section for grants and awards.

13.3 Bylaws
K. McGrath referred to the annual committee report included in the Board packet for a summary of accomplishments.

13.4 Continuing Education Committee (CEC)
B. MacLennan reported that Linda Golian and Alison Roth, CE coordinators for the mentor/mentee program, received an excellent response and that there will be 48 participants this year. L. Golian is in the process of changing jobs, so Alison Roth will coordinate the mentor/mentee reception. She noted that M. Crump is developing a distribution plan to library schools for the "Shaping a Serials Specialist" brochure with an accompanying description of its development prepared by C. Foster. Marty Gordon, CE member, is coordinating updates for the Human Resources Directory (HRD).

13.4.1
B. MacLennan noted that CEC has had an extremely busy year with outreach programs and accomplishing priorities set by the Board and the membership so that identifying...
schools offering publishing programs is still pending. She concluded by observing that many people are contacting CEC for NASIG programming. The Board is still interested in hearing from the committee regarding scholarships to regional NASIG CE programs (see Feb. 1997 minutes, section 4.4).

13.5 Database & Directory Committee (D&D)

13.5.1-2 J. Callaghan reported that the 1997 directory should be in the mail by June 20. The membership rate as of May 1 is 1,161 with a renewal rate of 87%. Having observed several non-renewals among retirees, D&D Chair Cheryl Riley asked the Board to consider a rate for retired professionals.

DECISION: The Board decided to retain the current membership rate structure.

The Board discussed ways to streamline the database maintenance process but no decisions were made.

13.6 Electronic Communications Committee (ECC)
A. Ercelawn called attention to ECC's annual report and advised that electronic services have not yet migrated to the new server at UNC.

13.7 Evaluation & Assessment (EAC)
J. Callaghan commented that the committee will try to compile conference evaluation results by the fall board meeting. She observed that this committee, unlike all others, operates on a calendar-year cycle. B. Geer will incorporate the EAC calendar into the NASIG Board Working Calendar.

13.8 Newsletter
M. Horn reported that the June issue of the Newsletter will be edited and produced after the conference. She will send the non-profit mailing documents to the postal office to qualify for a lower mailing rate.

13.8.1 Self-Study Report
M. Horn stated that the self-study report has not yet materialized. She will draft a report after she receives comments and assessments from the Editorial Board. She announced that John Harrison will become distribution editor, replacing Vikki Medaglia. She commented that Curry Printing & Graphics in Lewiston, Maine, is doing a very good job.

13.9 Proceedings
C. Diedrichs spoke with Bill Cohen at Haworth about the split volume numbers for the 1996 NASIG Proceedings. He assured her that this will not happen again. C. Diedrichs thanked M. Horn and Tom McFadden for assuming indexing responsibilities on very short notice.

C. Diedrichs summarized four issues which were discussed with Bill Cohen and which may require minor revisions to the contract: 1) document delivery components 2) splitting into 2 volumes 3) maintaining print copies indefinitely 4) refining a mutually agreeable copyright form.

Given resolution of these details, she recommended accepting Haworth's bid for 1998-2000.

ACTION: The Board approved Haworth as publisher of NASIG Proceedings for a three-year term, starting in 1998.

C. Diedrichs said that we need to bill Haworth in order to receive our annual contract payment. She raised a question posed by B. Cohen about bundling a subscription to Serials Librarian with NASIG membership benefits.

DECISION: The Board declined to pursue linking a subscription to Serials Librarian to NASIG membership benefits.

As a point of clarification, C. Diedrichs found nothing in the contract that prohibited the electronic version of the proceedings from being mounted as soon as it is ready.
13.10 Regional Councils & Membership (RC&M)
B. MacLennan reported that RC&M continues to work with CEC in identifying regional programs. The two committee chairs will compile a list of conferences in a particular region where CEC wants to develop programs instead of identifying all regional conferences in the nation. B. MacLennan also noted that some contacts occur when regional groups post announcements or calls for papers on listservs.

13.10.1 Traveling Display
B. MacLennan commented that the traveling display initiative is on hold pending coordination by incoming appointments. Key people will be Judy Johnston, publicist, Ann Nez, incoming RC&M chair, and Jim Mow, Board liaison.

14.0 Nominations & Elections (N&E)
In response to a request from N&E to explore ways to increase commercial representation on the Board, J. Gammon invited T. Feick to share her historical and current perspectives on this issue. She discussed voting patterns and trends among the NASIG members and recognized the complexity of this problem. The Board discussed ways to profile the significant contributions made to NASIG by the commercial sector through newsletter articles, committee assignments, and other ways to increase awareness of the importance of this representation throughout NASIG and on the elected Board. The Board will seek comments and suggestions from the membership soon.

15.0 STRATEGIC PLAN REVIEW
B. Geer commented that NASIG's Strategic Plan will need to be revisited and enhanced before the year 2000. She commended all committees for their significant progress this year in following the plan. B. Geer will facilitate updates of the Web version.

16.0 PERIPHERAL CONFERENCE EVENTS
The Board agreed that having a separate section on the conference Web site for other events worked well. At Michigan the section was entitled "Unofficial Notices That May Be Of Interest to Annual Conference Attendees." The Board will ask CPC for comments about the usefulness of the physical bulletin board.

17.0 NEXT MEETING & ADJOURNMENT
B. Geer thanked the outgoing members of the Board: B. MacLennan, K. McGrath, D. Tonkery, and J. Gammon for their service to NASIG.

The next Board meeting will be October 24-25, 1997, in Boulder, Colorado.

The meeting was adjourned at 5:28 p.m.

Respectfully submitted,

Connie Foster
NASIG Secretary

Congratulations to Cindy Hepfer for receiving the 1997 Bowker/Ulrich's Serials Librarianship Award and Birdie MacLennan, recipient of the 1997 Esther J. Piercy Award.

Executive Board Minutes
NASIG PRECONFERENCE: MAXIMIZING THE WEB FOR SERIALISTS
Track 1: What’s It All About? Integrating the Web into the Serials Chain
Reported by Cheryl Riley

Wendy Moore and Maggie Rioux, from NASIG’s Electronic Communications Committee, presented the group with an overview of the basic principles that needed to be considered when designing a Web page.

Wendy began the presentation by providing members with her list of “Four Things to Remember” — plus a few other things to keep in mind. First, know your audience. Who is going to be the primary user of your page, and what are their information needs? Second, what information are you trying to convey? Set objectives/goals for what you are trying to do and make certain you have content. Third, don’t reinvent the wheel. Your page does not exist in a vacuum: find good pages and look at the source code; use resources your organization has available; use resources available on the Internet; and use links relevant to your goals. Fourth, keep it clean and simple. Don’t overuse graphics or animation and remember that how your document displays is largely dependent on the user’s browser and monitor. The few other things included: check links regularly; don’t redistribute copyrighted documents; include contextual information on every page; include navigational links on every page; include the name and address of person responsible for the document on every page; and include the latest revision date on each page and keep the data up-to-date.

Additional handouts included an HTML quick reference guide, a selected bibliography of HTML resources, a list of interesting sites for libraries and serialists, hints for entering HTML using notepad text editor, and a list of HTML editors available on the Web.

Last, but not least, was the Web site to keep an idiot busy:

http://junior.apk.net/~jbarta/idiot/idiot.html

Track 2: Using the Web for the Public
Reported by Anne Frohlich

Michelle Collins Flincharugh (University of Michigan) and Robb Waltner (University of Evansville), gave an excellent hands-on presentation on some simple techniques to use in making Web Pages for the public.

They stated that a Web Page with embedded search engines, like Search Engines for the World Wide Web at the University of Evansville (http://cedar.evansville.edu/~libWeb/Web97/search.htm) provides a quick and easy means for doing a variety of searches. Submitting searches from your own Web page is usually quicker than searching from each search engine’s home page. This type of presentation also makes it clear to users that there are a number of search engines available to them and encourages them to try more than one search. The search engine providers themselves usually make available helpful information on how to embed their search engine into your Web Page. Often they even provide you with the tagging. In any case, be certain to investigate policies regarding what you can and can’t do with a search engine before embedding it so as to ensure that what you are doing is legal.

The presenters also gave hands-on help in utilizing forms, lists, and tables in a Web Page. To see examples for embedding search engines and utilizing forms, lists and tables, go to http://www-personal.umich.edu/~mflinchb/tools.htm

Track 4: Current Tools/Emerging Technologies for Advanced Web Authors
Reported by Valerie Bross

According to the pre-conference brochure, Track 4 was to include following ambitious list of topics: style sheets, frames, CGI, Java, Web authoring tools, Dynamic HTML, push
technology. Fortunately, the presenters discussed only the first two topics in any depth; the remaining topics were abbreviated to fit the time allotment and the attention span of the audience.

Stephanie Schmitt (Texas Tech) introduced the first topic: cascading style sheets. Style sheets are potentially very useful in standardizing the fonts, logos, and footers of Web pages throughout a site. For library Web sites, style sheets would permit various authors to post pages, without sacrificing consistency of presentation and without requiring a great deal of re-editing of pages by a Web manager. Unfortunately, style sheets have not yet been implemented widely, due to client browser limitations (though this should change over the next six months). For Web managers unwilling to wait, Stephanie Schmitt suggested a clever work around: the use of an "include" command. Details on the include command are given at: http://www.olemiss.edu/~sschmitt/NASIG-ecr/stylesheets.html

Next, Steve Oberg (University of Chicago) explained the structure and coding of frames. A simple 2-window frame requires three files: a "main" file that tells the browser how many frames to display and where to put them on the screen; and two content files that determine the information to appear in each window. Steve Oberg helped participants create their own simple frame; he recommended a Web site that helps Web authors build frames: http://www.missouri.edu/~wwwtools/frameshop

The structure and coding for CGI scripts or Java applets could easily be the subject of whole courses; the topics do not easily conform to a half-hour. So, Schmitt and Oberg concentrated on the uses, advantages, and limitations of CGI and Java, with a few illustrations. Stephanie Schmitt demonstrated an ILL form that she helped develop; her CGI script converts responses to a printable format.

Looking toward the future, dynamic HTML and push technology have received much attention in recent computer magazines. Steve Oberg noted the popularity of Pointcast (http://www.pointcast.com). Stephanie Schmitt relayed a suggestion of a systems librarian colleague, that push technology might be used on LANs to automatically upgrade software stored on clients.

PRECONFERENCE: BACK TO THE BASICS, THE SERIALS ACQUISITIONS ELEMENTS
Reported by Susan Andrews

The preconference started off with introductory remarks by James Mouw, Head of Serials at the University of Chicago Library. Mouw explained that he was to moderate for this preconference, since it had been decided that three presenters would have more than enough material to fill the time allotted. A brief introduction of the presenters followed, along with an explanation of why this topic was picked for a preconference. It was recognized that NASIG was heading towards more high-level and high-tech topics, but not much on acquisitions. Since serials acquisitions is not taught in the library schools, a need was perceived. We were also informed that this course was to be just the basics, we wouldn't be full-fledged, expert serials librarians at the end. Mouw's final comment was that we were to be "guinea pigs," as this was to be a possible road show for NASIG.

Pre-Order Processes: Making Orders Out of Chaos
Rita Echt, Acquisitions Coordinator, Michigan State University (MSU)

Rita Echt pointed out that serials is a business which works with scholarly publications. Serials is about relationships — relationships with others in the profession, with systems people, with vendors, with catalogers and so on. She then gave us a brief overview of Michigan State University and its library system, to help us to understand why they do what they do. Her library's materials budget is approx. $5 million and goes up about 5% each year. Close to $4 million goes to serials, the rest to books. The division used to go the other way, but about
one third of the budget now goes to electronic resources, which falls under the serials budget. Over $100,000 in new periodical subscriptions are added each year. Michigan State has III for serials control and acquisitions, and NOTIS for the rest of the library subsystems. Echt pointed out that things are not static in serials — serials grow, and serials management is working to keep up. It is essential to work cooperatively, in a joint venture with the serials management people. Serials management assists the bibliographers by providing monthly accounting reports so that they will know how much money is available.

The ordering process was covered next. It starts with a price and availability form which includes a request for a sample issue. If the subscription is started in June, Michigan State prefers to start the subscription with the following year and back order the current year. This has to do with how the University has set up its ordering system. Since serials are considered on-going and back orders are one time only, the back orders come out of the monographs budget and not the serials budget.

Requests for standing orders were next on the agenda. We were given a sample of the form that MSU uses and were told that the serials people were very persnickety with this form and that they could and would send it back for any information left off. The form then goes to the serials searcher who looks for whether or not the University owns, or owned, the item already, verifies the main entry and title, looks for notes and 780 and 785 fields. Other items checked for are: who cataloged (LC?), how many libraries have used the record, ISSN, and is the record NSD-authenticated? If 780 or 785 fields are found, copy for these records must be looked at as well (the previous title may be already owned). It must also be determined whether the item is a serial set, loose-leaf and/or updated, etc.

An estimated price is essential since that is the amount that will be encumbered. Allocation of future funds is based on the type of item and where the item is published.

Michigan State never purges their standing order records, and they use two ranges of purchase order numbers — one for standing orders, the other for everything else.

Serials acquisitions at MSU cannot assign funds, but they can assign vendors, which they do based on service, discount, and relationship with the vendor. Loose-leaf publications may be ordered direct but most things go to a vendor. As a result, the relationship between the vendor and serials acquisitions is symbiotic and essential with each party benefiting. Serials order records are manually keyed into the computer, but monographs are downloaded at Michigan State. Echt pointed out that everyone does this sort of thing their own way, depending on their systems, accounting, etc.

The electronic resources process is still being worked on. A new form for orders had to be designed, and a selection committee has been formed for electronic resources. These items have to be specially justified and any ads or written information on these items are also requested. One full-time staff person devotes full-time to ordering (or not) the electronic resources. Licensing agreements are another problem, and any information on these is also requested. At MSU, the Director of the library must sign off on all licensing agreements.

Echt showed us a sample accounting report, informing us that new serials could be ordered to replace canceled or ceased titles; any carryover from the last year's budget to the next is for items that were ordered last year, but that have not yet started or been paid for. We were also given samples of two kinds of statistics reports used for standing order fund management, as well as a brief explanation regarding the various fixed field codes in the order records file that could be used along with the computer's calculation of increase or decrease in payment to create various kinds of reports to help in collection development decisions and budgetary planning decisions. Reports involving geographic information of where titles are published are also being offered and have become very popular.
Gift subscriptions were also briefly covered, primarily with regard to items that are no longer coming as gifts. One form was a request for price and availability on items that are no longer being offered as gifts; the second was a notification to the bibliographer/collection development librarian that a title is no longer a serial, the current subscription price, and a request for further action.

Echt finished by noting that her presentation was a very brief description of the everyday goings-on in serials acquisitions. She also stated that she considered serials acquisitions to be the most exciting place to be in the library.

'Serials Record Keeping'
Marcia Tuttle, Head of Serials, University of North Carolina, Chapel Hill

[Note: The presenter for this section of the preconference was to have been Linda Golian, Head of the Serials Department at Florida Atlantic University, but she was unable to attend]

Marcia Tuttle began by asking the question: Why do we keep serial records? Her answer was to make sure that we are getting what we are paying for, and so that the public can see what we actually have in our holdings. Records also answer questions and allow communication with the vendors, publishers, etc. They show fiscal responsibility and history, as well. If records are kept carelessly, many questions can't be answered.

Our second question to be answered was: What makes records useful? The answers were special information and distinguishing information, but information that should also agree with the cataloging record. Clarity and consistency in records is vital. Check-in records should be very thorough and include things like binding specifications, date item was received, what was received, payment details, the invoice date, location, and how is it shelved. Any possible identity problems should be noted, such as the invoice numbers from a vendor or a publisher, is it a gift, is it a duplicate item, weird title changes (or not), and more than one title and/or numbering scheme.

Paying for titles was our next topic. There are primarily four types of things that might be taken for an invoice and might be involved in the paying process. The first is the invoice itself. The invoice can be identified because it will actually say that it is an invoice. It should be numbered and be checked to be sure that everything is correct. Is there a verification number, is the title correct, what are we being charged for, what is the account number, order number and specific item being ordered, what is the price, and what are the shipping and handling charges? The second item that can be received was referred to as a pseudo-invoice, which might be denoted "pro-forma." Basically, the pseudo-invoice is saying we'll send the item to you when you send the money. Some publishers will send these pseudo-invoices whether you ordered the item or not. The third piece of paperwork frequently received is a statement. Do not pay on statements. They are just an accounting of where you stand on paying at the moment. Check them over: if you show something long since paid that the statement indicates is still outstanding, let the sender know. Sometimes a new invoice will need to be requested for items on the statement that shows outstanding, and you don't show paid either, so that you can go ahead and pay. The final item received, in large quantities, is the renewal notice form. More and more of these are being sent due to automation. Many are sent even though you buy the item through your vendor. Ignore these for a while, but as it gets later in the year, you may need to check on them. Did you pay the vendor yet or, perhaps, change vendors? Something to watch out for is that some publishers invoice under title variations. Tuttle suggested that one good idea is to have vendors ftp large vendor invoices. A paper copy should also be requested, however. There is a need to be aware of the rhythm of accounting procedures in the paying process. In the summer, there is usually a period where you can't pay anything for a while (at the end of the fiscal year). Tuttle stated that s/he who orders must not pay. They can authorize payment, but someone else should actually pay. This
eliminates the chance of fraud and keeps the auditor, who may appear at any time, happier.

Claiming was the next topic. There were several basic don'ts covered. Don't claim what you haven't ordered. Don't claim what you don't keep. Don't claim what you haven't paid for. Finally, don't claim outdated annuals. The do's list included: Claim a serial you know has been published and claim by previous arrival patterns. When to claim is very controversial and subjective. Basically, you just get a feel for it with experience. Automated systems have a suggested claim cycle. The system should alert the need to claim, but it should not claim. The systems list of claims should be looked over by a human first. Various things should be included when claiming. Tell the vendor exactly what you are claiming including the account number, ISSN, OCLC number, order date, who you are, and the date of the claim. For a lapsed subscription, payment information should also be included. Most claiming is done through the vendor, but some of that depends on how fast the claiming works through the vendor. Claiming can be done directly through the publisher; in some cases, you may do better to claim direct with the mailing label. When claiming through the vendor, you will frequently get a claims report and may sometimes get a claims checker, which basically states what has happened so far with your claim and asks what action would you like to have taken now? In relation to the last question, it was advised that, in the case of subsequent claiming, two or three claims is about as far as you should go. After that you should cut your losses, it is a waste of time and money to pursue a claim after that point.

The final subject covered in this portion of the preconference was the daily mail. Most of the daily mail consists of ads, bills, renewal lists, invoices, and issues of periodicals. It is best to have mail delivered to the library unopened so that wrappers and mailing labels, etc. can be kept, when needed. It is desirable to learn to recognize items that shouldn't have come to the library. Be over-cautious, so that you don't wind up paying for something that you shouldn't have, or having to keep something that you didn't order or want. Tuttle also suggested that it is useful to have the institution with whom you have a membership supply a "comes with" report of titles included in the membership. She also mentioned that some libraries have discontinued renewal lists, telling the vendor to assume that everything is renewed unless otherwise notified, saving time and effort.

Vendor Evaluation, Selection and Interaction
Philip Greene, Vice President/General Manager, EBSCO Subscription Services

Philip Greene started by indicating that there were two parts to the reevaluation of current vendors and/or the evaluation of new vendors. The first was defining the needs of the library, and the second was defining the actual process of the review. Greene then went on to give some basic definitions. He first defined a vendor as "anyone who offers to sell products or services to a library organization" and also as a "partner." He pointed out that the library and the vendor need to work together to survive. The subscription agency was next defined as "a vendor that serves as an intermediary between libraries or organizations and publishers." It was also noted that some offer other services these days, such as current awareness and document delivery. The last thing to be defined was a serial. In this case, a serial was "anything and everything published more than once in its lifetime." We were then given the basic mission of an agency, which was simply to consolidate orders and claims instead of the library having to handle everything directly.

The next topic covered was what should be considered when choosing a serials vendor. The list included considering the vendor's knowledge of library processes and world-wide publishing, their ability to handle popular titles and work with fulfillment centers, their ability to provide service for all types of media and to provide assessment tools to help in collection development and budgeting decisions and finally, the ability to interface with automated systems. Greene emphasized that it was important that librarians insist that their ILS vendors work with their serials vendors.
We were then given an overview of what to include in the review/selection process of vendors. The first item to consider was a review of the library's needs, both in the present and the future; this would include a group discussion in the library, incorporating all departments. The next step is to come up with a RFP (request for proposal). Greene recommended that library's stay away from an RFQ and at all costs steer away from the outright bid. These can tie you down before you have really made all of your decisions. It was recommended that libraries have both a pre-RFP vendor interview and a post-RFP vendor interview. He pointed out that the vendors would like to discuss and get feedback, even if they didn't get the contract. Greene emphasized that the library should, above all, be reasonable. Don't ask for things you don't need or really want.

The selection process for a vendor was detailed next. Greene felt that the vendor should do a library site visit and recommended that libraries avoid doing business with a vendor who didn't make such a visit. He also felt that it was good for the library to send a representative to visit where the vendor actually does its job. He said that asking for references was fine, but that one should be careful to compare apples with apples and that you shouldn't be unreasonable in this area, such as asking for the entire client list. He also felt that the library should consider the vendor's corporate strength and not make the decision based solely on the sales representative. The sales representative doesn't work in the trenches or have much to do with the major portion of the corporation's strength. Consideration should also be given to what sort of development plans the vendor has. Greene recommended also looking at the pamphlet: Guide to Performance Evaluation of Serials Vendors, published by ALA.

Items that should be considered and go into the request for proposal were then covered. The first item to consider was a description of the title mix. Greene suggested that a complete list for review, at this point, was a waste of time, but he also pointed out that media needs should be included. What the library expects of the vendor is another essential. This would include: service criteria, library support, and automation environment, current and future. The library's timetable also needs to be considered (when does the library place its orders and how and when do you want to pay). Finally, what value added services would you like? Another consideration is the cost versus price.

The final step in this evaluation process is the actual selection and award process. Greene recommended a group review in the library, as well as a possible vendor interview with the top two or so contenders, to help clear up any final questions or details. He also suggested a post-award interview to thank the people who didn't get the contract and explain why they didn't get it. Greene considered this a courtesy to the vendors.

Greene concluded with a brief mention of ethics. He indicated that the universal axioms "if it feels good, it probably is" and "if it feels bad, don't do it" held true. He also stated that it was OK, and even good, to be friends and partners with your vendor.

Jim Mow made the closing comments. He informed us that further information on the preconference's topic can be read in the book Managing Serials by Marcia Tuttle and published by JAI Press. He also pointed out that there was still lots more to be discussed on the topic of serials acquisitions.

OPENING SESSION
Reported by Ladd Brown

Adding brevity to her myriad talents, President Beverly Geer scampered through the Opening session remarks like a librarian heading back to Stockwell in the rain. "I solemnly swear that I will not complain about the weather..." began Geer, as she administered the Meteorological Oath of Optimism to the assembled throng. Following the "Hello" from her cat, Jimmie Dale, she reminded us that dorms are like, well, "camp." After inviting all first-year attendees to stand and be identified (including birthday boy Jeff Bullington), Geer publicly recognized Adolfo Rodriguez, NASIG's first
Next, the Student Grant Award winners were announced. They were: Paula Bowering, Darcy Jones, Kristen Kern, Susan Kimball, Hsianghui Liu-Spencer, Steve Posti, Laura Power, Roumi Radenska, Frederica Scott, and Cynthia Wolf. Horizon Award winners were: Claire Dygart, Tracy Remington, and Wendy Stewart.

The next featured speaker was William Gosling, Interim Director, University Library. Gosling praised and thanked the Conference Planning Committee and then remarked how curious it was that the NASIG crowd filled the Rackham Auditorium from the front! Adroitly sensing that he was between "you and dinner" Gosling delivered a streamlined yet fact-packed photographic tour of the campus' highlights. The slide show began with shots of some of the university's 26 libraries and ended, not inappropriately, with views of what was once the largest football stadium in the country.

At the conclusion of Gosling's remarks, Geer announced that dinner was served and the multitude made an orderly procession across the way to the Michigan League for the repast and the very entertaining Chenille Sisters.

PLENARY SESSIONS

Strategies and Challenges for Digital Libraries
Wendy Lougee, Assistant Director for Digital Library Initiatives, University of Michigan
Reported by Ladd Brown

Self-confessed "idea junkie" Wendy Lougee, Assistant Director for Digital Library Initiatives at the University of Michigan, began her plenary session by likening serials to cereals. A recent article examining strategies in the cereal industry, Lougee explained, actually had relevance to strategies now under development in the growing world of electronic serials in our libraries. Four main points were mentioned: market-niche or market-share, innovation, product knowledge, and consumer-centrism. Lougee would wait until the final phase of her presentation to relate these four main points, these "lessons from the cereal industry," in library terms.

Lougee described sweeping changes in three areas that affect the general library environment. The three "forces for change" are technology, higher education and its mechanisms, and the publishing industry. These forces, Lougee said, act upon four broad library functions including collection development, archival operations, accessibility, and mediation (used here to describe interaction among author, librarian, user, and other agents involved).

"Digital libraries," Lougee stated in her prelude to the digital library story at the University of Michigan (UMich), "are inherently cross-functional." Lougee commented on some of the "strategic choices" made in the development of what is now known as Digital Library Initiatives (DLI). These choices involved investing in local infrastructure, securing local expertise, ensuring the creation of or acquisition of content, and setting boundaries of activity.

Lougee next related the history of digital library development at UMich, which began in 1991 with an information symposium. In 1993, three large UMich campus institutions — the Information Technology Division, the School of Information, and the University Library — banded together to create "a broadly defined digital library." The Academic Outreach Program is the newest member of this quartet. Some of the challenges facing the development of this digital environment, Lougee explained, were the diversity and wide distribution of the campus collections and resources, and the economic hurdles. Lougee said that the approaches used for developing the structure of the digital environment were both "top down" and "bottom up." Top down is illustrated by the creation of the "Information Gateway" (with "robust research capabilities") which serves as homepage; bottom up is the creation of content and access tools for the digital library.
Lougee described some DLI electronic journal projects like TULIP and JSTOR and then elaborated on some lessons learned from these projects. She stressed that critical mass, linkage to "legacy" systems, access issues (full-text, indexing, printing), and depth as well as breadth are all important in the successful electronic journal project. She then reported on DLI's text programs, the Electronic Reference Shelf, and visual projects.

Reprising the cereal industry example, Lougee commented that the market-niche for digital libraries would involve a move to role-focused services, instead of the traditional collection-focused libraries of today. The innovation point, in library terms, is to redefine customary functions of the library and of the librarian. "Know your product" is translated as: What are the inherent characteristics of digital libraries? The consumer-centered component, Lougee said, involves the user in the design.

Lougee added some final thoughts. She stressed a project approach ("learn by doing"). She said that collaboration was absolutely essential, and that new roles and new boundaries will be created by the evolution of libraries into digital libraries into "knowledge environments."

Scholarship in the 21st Century — Surviving the Next Millennium

Dan Tonkery, President and Chief Operating Officer, Dawson North American, main speaker; Richard Dougherty, Professor, University of Michigan, School of Information; and Kathy Norton, Director of the Library, Marine Biological Laboratory/Woods Hole Oceanographic Institute, reactors

Reported by Pat Frade

Dan Tonkery started by contrasting 15th century monks, who spent their time copying manuscripts, with scholars of today, who are centered around knowledge. Debate and dialog stimulate the advancement of knowledge which creates scholarship activity. According to Tonkery, the impact of technology on scholarship is changing the way scholarship is disseminated. Technology is moving rapidly into multimedia, opening a new world for libraries and users — the virtual experience. It is providing new information communities — the invisible college and virtual library. These communities are changing the role of the library and publisher and creating new information providers. In the next century technology will support scholarship with networks and the Internet; Internet II; digital library collections; electronic delivery systems; and high performance computing.

The Internet is evolving into a mainstream medium with 50% of the population online; 33% of Internet users are under 30 years of age. The goal is to have e-rate for affordable telecommunication charges and to have colleges and universities supporting all of this. President Clinton's goals are to have all schools hooked to the Internet.

The current intellectual infrastructure is supporting scholarship with printed matter (i.e. books, journals) which is distributed by snail mail and stored in libraries which are partial collections of recorded knowledge. The library's role is to add value to its current infrastructure by selection and acquisition of material, organization of material-structured information systems (organized knowledge), improved access and reference, finding and synthesizing information, and teaching and training users. The publisher's role is to add value to the current infrastructure by quality control (peer review, format standardization, editorial assistance), distribution, sales marketing, and copyright. The vendor's role is to maintain inventory control, management support, and communication.

One limitation of the existing infrastructure is that the searching tools are slow. They require specialized skills, are geographically limited, and language limited. Another limitation is the common practice of replicating collections. Information technology will overcome the above shortcomings with improved speed, improved format, and improved productivity. It will change the
"structure of the library" and create a broader community of scholars. It has the potential to lower costs and shift the way scholarship is disseminated and created.

The challenges of the digital library are management, user interaction, and search technologies (e.g., ability to search many languages). Acquiring knowledge in the 21st century will require the ability to capture, store, organize, search, process, and retrieve information. And the knowledge will come from information providers (publishers, universities, libraries, self-publishers) and from information partners (professional societies, aggregators, wholesalers, knowledge warehouses). The potential negatives of new technologies are: the inability to check the validity of the information; the reliability of the source; the danger of mis-educating; the loss of logical retrieval; the shift in attention span to seconds; and the Internet, which does not distinguish between the true and fake, important and trivial, enduring and ephemeral.

Who will survive the information technology transition? Survivors will include the end users, the content providers, the technology managers, and the electronic commerce managers. We will live in a mixed environment for a long time and the challenge will be to support both the traditional and new information systems and survive.

Richard Dougherty, responding to Tonkery’s address, discussed change. There have been many technological changes in the past 25 years. The pace and intensity of change will continue to increase in the future. The learning methods and environment of today’s youth have changed. Change used to be logical, predictable, and incremented. Not so today — it’s more chaotic. We live in a constant white-water state — the whole environment is unstable. The wave of change and technology is just starting to hit higher education. It is also starting to hit vendors and publishers.

As far as libraries are concerned, change is still slow and incremented. How should libraries change? We need better collaboration and marketing. We should be in tune with our various communities and be aware of the needs of users. We need to be more vocal, insistent, and persistent.

Kathy Norton expressed concern that university administration may be missing the concept. The human factor plays a big role in our services and how they relate to changing technologies. Scholarly works and knowledge are a commodity — the government pays the scientists to do the research, the scientists give their work to the publisher who, in turn, puts bells and whistles on it and sends it back to the university. The publishers aren’t making any commitment to archiving of electronic resources. Libraries have moved toward the role of teachers.

The virtual library means that everyone can bring it up on a terminal screen and print their own copy — which means more paper will be used. The library will remain a physical place — people need a place where they can get away and think. The library can and should be involved in "the production of content." Libraries will survive if they help the publishers (their feet are in mid-air) and faculty members change their way of doing things.

Jam Tomorrow, Jam Yesterday, But Never Jam Today: Some Modest Proposals for Venturing Through the Looking-glass of Scholarly Communication

Arnold Hirshon, Vice Provost for Information Resources, Lehigh University
Reported by Gale Teaster

In his role as Vice Provost for Information Resources, Arnold Hirshon oversees the university libraries and the computing services of Lehigh University. His previous experience at various universities, activities in the American Library Association, and his various publications demonstrate his interest in and knowledge of the history and future of libraries. Hirshon’s presentation focused on the development and current status of scholarly communication, as well as a discussion of the coping methods libraries should use to deal with the changes taking
To illustrate the complexity and uncertainty of the current state of the information environment, Hirshon chose to use the "philosophy" of Lewis Carroll's Alice in Wonderland. In the looking-glass world which Alice encountered, everything is backward and the rule is always, "jam tomorrow, jam yesterday, but never jam today." Libraries and librarians are like Alice, wanting the jam today. Libraries have a great history, a great future ahead in the electronic world, but how do libraries and librarians cope with today? Hirshon had four primary "change factors" with which libraries must cope: changes in society, technology, higher education, and scholarly research and publishing.

One major societal change is the erosion of support for higher education. Overall, the funding for institutions of higher education has been reduced, while costs have risen, especially in serials publications. Tuition costs have also risen. From 1980 to 1996, tuition costs rose by 256% in private colleges and 219% in public colleges, while the consumer price index rose less than 80%. These high tuition costs pose a serious problem for parents and students. Higher education is no longer viewed as a common good, but as just another big business.

Another change factor relates to technological changes. Libraries and librarians have faced and dealt with technological changes, but these changes are occurring more frequently and must be incorporated more rapidly. Information access is moving from the "brand name concept of information" into an era where users just want to search every index simultaneously. For example, in the past, a user might have been referred to Historical Abstracts for a history related question. The new technology will eliminate the necessity of using the "best" index for the topic and the focus will be on getting the information the user requires. The elimination of "brand name" searching will apply to electronic journals, too. Users will concentrate on the article, not on the cover of the journal.

Changes are occurring in the existing concept of higher education, producing more change factors. One of these changes is the development of competition from the public sector. Responsibility for education is moving from the higher education arena to the business community; for example, some businesses are creating their own training and education sections. Distance education is changing campus-based education. Hirshon quoted Peter Drucker, as saying the changes which occur in higher education will be as dramatic as when the printed book was first developed. It took 200 years for the printed book to create changes in the system, but it will not take that long for this next big change to occur. Other changes affecting higher education are internal university competition for fewer dollars and the attack on the tenure system.

The process of scholarly research and publishing is also facing changes. The days when it took two or three years for a scholar's research to be published are gone. Information is now being distributed on the Web, which has become a more stabilized medium for the sharing of information. According to Hirshon, the lack of electronic journals was not due to a reluctance to change, the high investment of electronic journal access, or problems with current technology. Simply put, the problem was publishers did not know how much to charge and libraries were not sure how much they were willing to pay.

After presenting the changes and the problems created for libraries by these changes, Hirshon suggested four areas libraries need to evaluate in order to develop an action agenda to deal with the "jam today." Redefining the academic information organization was the first suggestion. Libraries are no longer buildings, but are information providers, regardless of format or location. The successful library of the future will view technology as a "driver" of change, not just an "enabler" of change, and will be able to work with partners within the institution to provide technological solutions to problems of the university. This can be accomplished through formal mergers (for example,
between the library and the technological area) or informal mergers (for example, through working together on specific projects).

Libraries also need to review and change the methods used for measuring productivity in the academic environment. Today's productivity measures are based on the concept that a good library is a big library. Standards are based on the number of physical volumes. Unfortunately, libraries can not keep up with the growth of publications. The measure of a good library should be based on the library's available services, the time needed to secure the requested information, and whether the library has access to a good mix of resources. Library resources must be accessible, not necessarily onsite, and libraries must be more in tune with client satisfaction.

To develop a positive action agenda, libraries must also deal with the factors which are "realigning" library budgets. Yesterday's pricing was driven by inflation, price discrimination, U.S. dollar fluctuations, and the high investment in electronic publishing. Planning the library's budget can no longer be done by adding the cost of inflation to last year's budget. Libraries must build a collection for the faculty and students of tomorrow. This will require a stringent review of the budget annually and a thorough serials review and cancellation project on a multi-year cycle.

Increasing collaboration with other institutions is another move toward a progressive action agenda. The development of consortium groups can be multi-state or based on type (for example academic libraries) but should be based on strategic alliances which focus on a specific area of interest or a specific need. Funding may come from the state and/or charges could be levied on members. These consortium groups must have dedicated staff available to handle the business of the consortium.

What will it take to achieve the suggested action agenda? Leadership -- people willing to take risks, find resources, provide encouragement, and compromise. Hirshon concluded by reminding the audience that you can't have jam tomorrow, if you don't start making some jam today.

**ISSUE SESSIONS**

**Issue 1: CONSER Goes out on a Limb: the Interim Guidelines for Online Versions**

*Jean Hirons, Acting CONSER Coordinator, Library of Congress*

Reported by Regina Beach

The current official CONSER stance on the multiple versions debate was given by Jean Hirons of the Library of Congress and some invited friends. They were: Jim Holmes from the University of Texas at Austin, Thomas Downing of the U.S.G.P.O, and Linda Terhaar and Tom Burnett from the University of Michigan.

CONSER has taken on a leadership role in the management of electronic serials and has done so in the spirit of collaboration through standardized experimentation. With this same enterprising boldness, the "Interim Guidelines for Online Versions," was created in August of 1996. The guidelines empower individual libraries by allowing them to decide on the local level how to treat multiple versions. Libraries have been given this option for a single record for a number of reasons: shortage of staff resources, desire not to repeat microforms practice, and electronic resources are in an unstable environment. CONSER practices sometimes do not fit local needs very well because these are two very distinct cataloging levels. The national database constitutes the national bibliography that must reflect the bibliographic universe. They exist more or less to serve other libraries. Local databases must out of necessity be user friendly and patron oriented.

The single record option is: in keeping with AACR2, a flexible option for any library, a way of noting a related physical version on the record for the original while also providing the online location, and is working so far. The
single record option is not a composite record. Coded data is not given. Multiple ISSN’s are not given. Additional notes and details of the online version are not given. This may or may not change in the future.

The cataloging of electronic serials and other formats as well will continue to evolve. The future of AACR2 will be discussed at an invitation-only conference sponsored by the MARBI Joint Steering Committee on the Rules on October 23-25 of this year in Toronto. Contributed papers may be viewed on the JSC Conference homepage at: http://www.nic-bbc.ca/jsc/index.htm.

The University of Texas at Austin had to go to the one record option as a matter of necessity. Jim Holmes outlined the history of the serials cataloging. The 1970’s were oil boom days of full coffers and staffing. There were 4 professionals and 7 staff members. These were also the days of the “sercat tanning team,” and everybody had matching t-shirts. In the late 1980’s, “How to do More with Less” became the motto. There were 5 people in serials cataloging. Microform item records were attached to bibliographic records as a labor-saving procedure. The 1990’s brought in the “Dawn of the Age of Electronic Resources,” URL’s, and requests for e-journals. Serials cataloging was asked to add 6,000 JSTOR titles: “it would be awfully nice by tomorrow.” So the 1990’s have become the days of “How to do Even More With Even Less and Be Quick About It.” The public services response to the multiple versions issue at UT-Austin was: “We don’t care for you or your rules. We want what we want and that’s what the public wants. Don’t clutter up our catalog with records.” So at this particular university, multiple versions was not much of a debate due to economics and opinion. The single record option has worked well for them.

Thomas Downing explained in great detail a bibliographic record using the single record option.

Linda Terhaar and Tom Burnett presented from the opposite perspective — the public services one. They showed, with a series of searches, the effects of different cataloging decisions.

Issue 2: Electronic Publishing: Between Two Poles

Danny Jones, Assistant Library Director For Collection Development, University of Texas Health Science Center at San Antonio; Vicky Reich, Assistant Director, High Wire Press, Stanford University

Reported by Jos Anemaet

Publishers and librarians find that even when the electronic version of a journal is readily available and the needed articles easily printed, many library patrons still prefer paper over the electronic version. Therefore, libraries need to collect and manage access to, and storage of, both forms — hence the two poles referred to in the title.

This presentation, however, concentrated on issues surrounding access, acquisition, and management of e-journals. Urging us to manage technology, rather than being managed by it, Danny Jones briefly covered PubMed, a searching tool in the biomedical field indexing some 3,000 titles. With PubMed, scientists have a powerful tool and instant, free access to the journals to which they subscribe.

Jones suggested that we use existing vendors to acquire and register e-journals, since requirements for registering are different for each title and vendors are familiar with the particulars. He has little patience with publishers who want to limit access only to patrons with a valid password, since he has found it impossible to make users forget the password once they leave the institution. And the suggested solution — changing the password and notifying all authorized users every few months — is too burdensome for librarians and users. It defeats the purpose of e-journals, which is the sharing of rather esoteric information, relevant only to a select few. Access to e-journals should be made as easy as possible and license agreements should be simple enough for an 8th grader to read and understand.
Usage of electronic journals is hard to track and it is even more difficult to know how, in what form, and for how long it will be archived, which makes choosing the electronic version over print a complex decision. However, Jones predicted that in the near future scholars, students, and scientists will have immediate, seamless access to most e-journals.

Vicky Reich explained that High Wire Press (HWP) is a unit of Stanford University Libraries, founded to foster research and teaching, and "leverage" new technologies and the Internet for scholarly communication. The key issues she wanted to cover were selection, access control, licenses, subscription models, and archiving. Reich based selection of a title for HWP on the quality and the impact of the content on researchers, because she did not believe that they simply needed better access to second-rate literature. Also important were content enhancements with search/browse capability and different text or image formats for specialized use, as well as good design offering links within and to other journals. Reich considered open, easy access — meaning no username/password requirements — and effortless editing of registered IP addresses to be the goal of access control. There should be no dispute over simultaneous uses nor any problems activating supplementary online subscriptions. Customers' numbers are needed, however, to notify, offer new services, and contact them in case of problems. But she did not believe that license agreements were necessary. Reich observed that we will not have an "elegant technical solution" to the archiving problem "anytime soon," and that anyone who claimed otherwise is either "lying or naive."

She then shared some of the results of a user survey soliciting feedback. It should come as no surprise that scientists use both online and print journals, but as many as 35% would not subscribe to a journal that was published only electronically. Approximately 1/3 of the people in the audience were publishers and some may have taken exception to the statements about license agreements and password requirements. But many others expressed great interest in these projects. Reich promised that High Wire Press will respond to all e-mail messages and supplied the following HWP's Web and E-mail addresses: http://highwire.stanford.edu and highwire@forsythe.stanford.edu

Issue 4: The Electronic Archive: Two Views

Andrea Keyhani, Manager, Publisher Relations, OCLC Online Computer Library Center; John Tagler, Director, Corporate Communications, Elsevier Science
Reported by Jodith Janes

Andrea Keyhani began her presentation by reminding the audience that electronic archiving is uncharted territory and has suddenly become a major consideration. The rapid evolvement of the World Wide Web has made electronic preservation a concern because of the philosophy that library users should have access to all types of information. An electronic archive is needed because: 1) digital data is abundant; 2) technology is changing rapidly; 3) software and hardware quickly become obsolete; 4) preservation issues need to be addressed; 5) data integrity must be ensured. Some of the issues involved in data integrity are content, fixity, reference, provenance, and context. Exactly what is the content of a record? Is it the document itself? The document plus all linked materials? Is the storage medium black and white or color? Is the original permanently fixed or can the author or others make small changes? How will the record/piece be found? By URL, PURL, DOI (Digital Object Identifier)? Who owns the piece? What is a piece linked to? How is it disseminated (CD-ROM, e-journal, etc)?

Even once these questions are resolved many others remain, not least of which are the requirements needed for the electronic archive. These include technical expertise in user interfaces which must be easily retrievable and have a search engine capable of various levels of searching. Access control involves the validation of users of the archive and the level users will have access (for example, providing perpetual access for all
the years the user subscribed). There is a need for constant maintenance, updating, and migration of systems. File storage is not a trivial matter, as massive storage will be needed if all data is to be immediately available. A computing and telecommunications infrastructure must be maintained with allowances for bandwidth and disaster planning. The need for extensive storage facilities and financial resources cannot be over-emphasized, as well as a commitment to permanence, backup, and recovery mechanisms if failure should occur in the system.

Trust, motivation, and track record are all important considerations in any discussion about who should/could create an archive. Possible players are publishers, aggregators, individual libraries, national libraries, or library cooperatives. Publishers have traditionally focused on new areas of research, current trends, and the organization and production of material, but not on archiving. Their strength has been in identifying and fulfilling information needs and the packaging and marketing of information. Aggregators are neutral third parties who gather data from multiple sources but do not have much technical expertise and little motivation or commitment to archive data. Individual libraries have access to e-journals but not the technical expertise, infrastructure or financial resources. National libraries are concerned with preservation but, like the Library of Congress, have no mission, nor the funds to create an electronic archive. Library cooperatives can marshal resources not necessarily available to individual libraries: a central e-archive could increase access, allowing cost sharing of resources and infrastructure. The establishment of an electronic archive is crucial but resources for technical expertise, cost sharing and infrastructure must be found or developed.

John Tagler noted that while we are all busy discussing the need for the creation of an electronic archive which is important, there is no concerted national effort for the archiving of print records. In fact, the archiving of print materials continues to be a largely ad hoc arrangement. In recent years there has been a shift in the philosophy as to what the mission of the library ought to be. No longer is the library seen as a comprehensive collector of all information but as a provider of access to information. Libraries are faced with new technologies which present new challenges.

Elsevier is probably typical of a speciality publisher and is committed to keeping all information archived until archiving is available elsewhere. One central question, yet to be answered, is for how long archives should be available in light of the ongoing costs of maintaining e-archives. He urged the audience to remember that science files are/will be very large and after 3-5 years most scientific material is of limited commercial value. Also, the type of publication affects potential value (for example, short reports, letters, etc.) often affects the lifetime of a publication, especially in science and medicine.

Future plans at Elsevier include the launch of Science Direct, an online journal database with the host facility available through Lexis/Nexis. Elsevier will offer 1,100 science journals, including those of other publishers, with an abstracting and indexing layer, and links to other databases which will be available before the print versions. HTML and PDF formats for display and print options will be offered, as will reference links, article snapshots, search profiles, search and browse, full text and document delivery. Currently in beta testing, Science Direct will be released in July or August 1997 and will include an EMBase link. Preliminary pricing possibilities include a content fee, dependent on/linked to the institution's current Elsevier subscriptions. Other publishers will determine their pricing structure; a platform fee; and transactions fees linked to royalty fees and subscriber/non-subscriber are other pricing mechanisms. Access levels will include access for subscribers for the current year plus two previous years: all users will pay something; canceled subscriptions will be still be available for the years the subscription was active. Current plans envision a ten year file with archival CD-ROMs as a possible purchase option. Subscribers to this system will need hardware infrastructures on which
the information can be mounted and technical staff for support and maintenance functions.

Other issues that will need to be resolved are author needs/article integrity, public record/access, and format longevity. Author needs and article integrity are most important and are the strengths as well as weaknesses of electronic journals. While printed journals are currently accessible to almost anyone electronic versions are not necessarily available due to system requirements. As for format longevity, SGML appears the most promising.

The session was well-attended and resulted in much interaction between presenters and audience.

**Issue 5: Strategic Partnerships & the "New" Subscription Agency: Hopes & Dreams for the Next Millennium**

*Adrian W. Alexander, Senior Manager, Strategic Development, The Faxon Company, Inc.*

Reported by Nancy Newsome

Adrian Alexander began by taking the audience through some definitions of partnering which stress the components of shared risks, responsibilities, and opportunities. As background for the topic, he moved into an explanation and history of Deming's Total Quality Management (TQM), many of the same principles being applicable to partnering. This discussion covered the problems that Americans in particular have had with TQM. One of these problems is that of instant gratification.

Alexander stressed that the changes that take place with a TQM program take at least 5-7 years. Short-term needs cannot win out over the long-range plans. Trust has to be developed. Managers must promote thinking of the organization as a whole, acting as coaches or mentors to encourage team efforts. Partnering needs many of the same elements. It requires time to develop and become an integral part of the business. Partnering also requires an understanding of the importance of continuous improvement, which is the basic, underlying principle of TQM. This is an element that has been missing in many partnerships.

The stages of evolution of a buyer-supplier partnering relationship were covered next. Stage 1 consists of uncertainty and cultural inhibitions as the partners are evaluating one another on their level of commitment and honesty. Stage 2 deals with the short-term pressures of holding the line on costs on the part of the buyer and closing new sales on the part of the seller. The relationship remains one of caution. Stage 3 is the recognition of the need for a new paradigm and is the critical stage where the traditional process can remain, or the partnership can move on to a new level. Stage 4, the most difficult one, calls for a paradigm change when trust becomes critical and the emphasis shifts from price, quantity, etc., to quality, just-in-time, and continuous improvement.

This is the stage at which the supplier must be quality- and customer-focused, and have an internal system which will sustain and improve its current performance. The buyer must be willing not to use volume of business as a leverage for price guarantees. Stage 5 requires a full awareness of the commitments and has a goal of higher levels of performance to meet customer needs. If all has been successful so far, at stage 6 honesty, openness, and trust emerge as new values and both organizations are interacting at all levels. Partnering has truly been reached at stage 7, with the buyer receiving added value and the seller benefitting equally. At this stage, according to Alexander, "both organizations have cemented the relationship in the name of competitive advantage."

With this background behind us, Alexander then moved into a discussion of the partnering issues in the serials industry. One of these is the complexity of the challenges. Alexander formulated a new word to describe the situation — "coopetition" — which he defined as the act of working together toward a common goal with the intention of competing with each other once the goal is met. Another of the challenges revolves around library
constraints, particularly for academic libraries whose financial requirements are mandated by state law, leaving little room for negotiating. These, and other challenges discussed, can be found, such as outsourcing.

The emerging partnerships were outlined next, such as subscription agencies partnering with publishers as a front-end for electronic journals. Some smaller publishers are going to agencies for partnership to help with technical support. Agents are also partnering with ILS vendors to establish standards for EDI. Agents are establishing alliances with book vendors to provide a sole source for corporate libraries. For smaller libraries which are not a part of a buying group, the possibility exists for an agent to assist in forming consortia to create buying groups so that electronic resources will be more affordable. Libraries can also outsource their check-in function with an agent, having the agent’s staff physically in the library to update the library’s own records. There are many other possibilities for partnering among the three main players, all of which involve the sharing of ideas, the pain, and the benefits which partnering will bring about.

Issue 6: Understanding License Agreements for Electronic Products

Trisha Davis, Head Continuation Acquisition Department, The Ohio State University Libraries

Reported by John Harrison

[Note: John J. Reilly, Associate Legal Counsel, Office of Legal Affairs, The Ohio State University Libraries, was to have co-presented this program but was unable to attend]

Librarians regularly deal with license agreements when acquiring electronic products and services. As the librarian’s role evolves from handling only the traditional serial subscription to managing these electronic services, a knowledge of contractual issues is mandatory. The actual license review process is complex and requires expertise and skills beyond the training and experience of most library staff. Trisha Davis noted that although selection training and automation training are available at most library schools, no one is yet dealing with issues involving the law and contracts.

The legal environment is uncertain for electronic texts. The complexities of electronic texts are currently being controlled by the Uniform Commercial Code in the form of contracts. Any license agreement should include all the provisions your library needs and expects to define the use of the product. A sales representative’s words must be in writing to have legal meaning. The signator on a contract must be authorized to enter into contracts, and it must be clear and in writing as to what kind of contract into which they can enter. The concept of Apparent Authority (by your title or position responsibilities) may imply that you have signatory authority. One doesn't need to be a lawyer to review a contract, but it should be clear to both the librarian and the reviewer what responsibilities lie with each.

Parts of the contract one should be familiar with are: Recitals (who are the parties entering into the contract); Definitions of products and/or services in the contract which should never be assumed; License Grant – the heart of the agreement; User capabilities (make sure these are not too limited for the library's needs); User restrictions (make sure these are reasonable); User obligations; and Proprietary Rights. ACRL will be announcing seminars on this topic in the near future.
Erik Jul discussed three initiatives in Internet cataloging. He began by describing a project to build a catalog of Internet resources which ran from October 1994-June 1996. The project was motivated by a desire to explore problems and opportunities associated with providing description and access for Internet resources using library standards, practices, and systems instead of starting from scratch. The project also sought to exercise MARC and AACR2 to learn how far they could be used in coping with the Internet. Employing a voluntary effort, participating libraries would identify, select, and catalog electronic resources. How libraries become aware of online resources needed to be discovered, as well as what selection criteria should be used. The focus was on cataloging as the undergirding structure of the library. Record requirements would include the use of USMARC, AACR2, and the 856 field. Participants comprised 231 libraries and information organizations (now grown to more than 430) from 44 U.S. states and 11 other countries, and all library types including 12 health science libraries.

Jul heard such initial reservations as: "Nothing on the Internet is worth cataloging," "Everything is 'here-today-gone-tomorrow',' and "MARC and AACR2 will not work." In response to these objections Jul countered that there are now over 12,500 bibliographic records in the InterCat Catalog (http://purl.org/net/intercat). However, "error 404" is a problem; in a test of site stability 3 per cent of InterCat catalog records failed. Jul thinks this low error rate should be expected since these sites were to some extent selected for cataloging in the first place because of their perceived long-term value. On the question of MARC and AACR2 suitability, definite limitations were found in handling image data, hierarchical relationships, and multiple versions. But, Jul did repeat that over 12,500 records have been created using MARC and AACR2.

Jul sees a new relationship developing between an item and the bibliographic record created to describe it. Until now the bibliographic relationship involved a universal bibliographic record describing an immutable resource. Now that relationship has evolved into the creation of a customized bibliographic record for each library depending on which pieces of an online resource that library has access to, or decides it will point to. In the online environment the bibliographic record is being put to uses other than the strictly cataloging ones of inventory control, shelflisting, and physical access. Jul postulated the Big Bang theory of Internet development. In the beginning were hot and diffuse bits of data, which have now coalesced into "globs of stuff," such as IDEAL, FirstSearch, and JSTOR, that may or may not permit access to a particular source cited in a bibliographic record's 856 field.

The second initiative Jul discussed was persistent URLs (PURLs). The URL does not work as a link if it changes, but a site owner must have control over and the ability to change a URL as needed. This dilemma leads to trouble for libraries that include URLs in their catalog records. Patrons have no tolerance for connection failures, and one journal is not substitutable for another. A severe maintenance problem results for all libraries that try to keep URLs current. The PURL was developed to overcome this shortcoming. It works with the http protocol and all Web browsers since it is a modified URL. The PURL server manages the database of URLs and PURLs to maintain the relationship/connection between a URL and its unchanging PURL. If the PURL is used in all places where the link must be maintained, URL changes will not cause connection failures. In InterCat catalog records, the URL is moved to subfield z, and a PURL created by OCLC occupies subfield u. However, these PURLs do not transfer to the master file record in the OCLC online catalog.
The third initiative Jul talked about is the state of metadata. The term came from outside the library environment, but it means data about data. Therefore, library cataloging is metadata. The topology consists of discovery, terms and conditions, context, structure, content, and use history. He mentioned the Dublin Core Metadata Workshop Series, created to encourage interaction between computer scientists and librarians to foster a heightened level of mutual trust and appreciation.

Jul closed by encouraging the audience to go home and catalog Internet resources both for personal growth and to enrich the collective store of bibliographic information.

Project 2: Innovations in Journal Access
Pt.1 Full-Text Delivery : The CORE Journals Project
Beth Forrest Warner, Interim Asst Director for Technical, Access, and Systems Services, University of Michigan
Reported by John Harrison

In 1994 the University of Michigan entered into partnership with UMI and H.W.Wilson to provide access to full-text and full-image articles from approximately 600 journals, linking them with the Wilson Indexes in the Library’s online catalog, MIRLYN. The project was built on the success of the TULIP project in 1992. Discussions began with UMI in 1993 in order to create the partnership among UMI, Wilson, and Umich.

The project first had to create a common key match in the indexes where none had existed. The project has implemented distributed printing, online charging capabilities, and the development of matching algorithms to map images from one vendor to journal index citations from another. To date about 218,000 articles have been accessed and about 1.4 million pages have been printed. Charges have been implemented for pages printed to help cover costs. One of the lessons learned is the high maintenance on the CD-ROM drives and the relative slowness inherent in the technology. The project also learned that with different editors on each of the Wilson indexes, citations have variations on names and indexing points. These problems convinced them that word sampling and not string searching would provide the best service.

Beth Forrest Warner provided the following as a list of final thoughts on the project: keep standards always in mind -- in both the purchase of datasets and in your own programming; try to eliminate mechanical components in favor of electronic; try to get the most flexible licensing you can when purchasing/leasing datasets; consider staff competencies and training to be of prime importance when setting up a project such as this (or in introducing any new vendor supplied database); and the shift from R&D to production needs to be considered in the planning stages of the project.

Pt. 2 - A Presence at the Evolution
William Landis, JSTOR Production Coordinator, JSTOR/University of Michigan

The delivery of serial publications in an online environment occurs in a rapidly changing arena with multiple stakeholders. It can be a difficult proposition for librarians to sort out where their concentrated efforts might achieve the greatest impact. JSTOR, described by William Landis, is an ongoing venture which has demonstrated the viability of digitization and online delivery of backfiles of scholarly journals and has utilized the skills of librarians in the process in new and creative ways.

JSTOR began as a pilot project sponsored by the Andrew W. Mellon Foundation. The pilot, encompassing ten journals in economics and history, was carried out initially at seven library sites. JSTOR scans every page of every issue of the journals indexed in the database at 600dpi resolution, creating an collection of page images. Optical character recognition software is used to build a text file. An indexing file completes the trio of digitized files.

Among challenges faced by the production team were finding all issues of the journals, including supplements, and dealing with
damaged paper. The cost of 100% examination of the data for quality control became prohibitively expensive, and the project team moved toward statistical sampling, while holding the scanning vendor to specified standards.

Final thoughts from Landis included an increased awareness of the complexity of the new information environment that he and his staff gained from the project, and the attendant complexity of the collaborations which are so important to the success of such a project. As Landis is now seeing the project go from a Mellon Grant Project to a commercially available product (100 journals are planned to be available to the public in three years), he noted that the management and documentation of the project changes.

Project 3: Building a National Electronic Collection for Long Term Access
Nancy Brodie, Government Information Holdings Officer, National Library of Canada

Reported by Donna Yanney

Nancy Brodie asked, “What does it mean to build an electronic collection?” Any institution starting this task needs to consider what collecting level is appropriate for its needs. Collecting levels include linking to Web sites from a home page, mirroring a site hosted by someone else, serving or being the primary host of the provided information, and archiving. Archiving means that the material is not only hosted at the institution but that the institution intends to keep the intellectual content of the material available on a permanent basis. One of the goals of archiving electronic publications is to maintain the integrity and authenticity of information. Another goal is to ensure the archives are comprehensive as to collection policy and completeness. A third goal is assurance of access. And finally, by archiving, an institution can ensure the survivability of information based on media stability.

Who is responsible for archiving? Many different entities have stepped forward to fulfill the role of archiving electronic information. Among these entities are individual librarians, individual libraries, library consortia, non-profit organizations, high tech companies, publishers, subscription agents, scholarly societies, federal governments and national libraries. While each of these has some interest in archiving, national libraries for many reasons are ideal candidates for this activity. A national library has the role of keeper of a nation’s published heritage, as set forth by legal deposit laws. National libraries serve the public good. National libraries follow the IFLA rule of universal access to publications. And national libraries take a long term view of things; they won’t be tempted to weed in a year or two.

The mandate of the National Library of Canada is to collect, preserve, and promote access to Canada's published heritage to build a strong national resource to support the study of Canada. The NLC collects materials published in Canada, written by Canadian authors, or concerning Canada. Starting with the Electronic Publications Pilot Project which ran between June 1994 and July 1995, the NLC has been extending this mandate into the electronic environment. The NLC now maintains a permanent electronic collection of over two hundred titles.

The NLC defines an electronic publication as any work which is encoded and made available for public access through the use of a computer by its creator. The selection criteria used by the NLC gives priority to Canadian publications which are solely electronic or are complete publications which have parallel print counterparts. Selection favors standard formats, where available. Not selected for archiving by the NLC are news groups, lists, and Web sites.

The actual acquisition process of electronic publications is the most time-consuming part of the operation. The NLC must first acquire permission from the publisher to archive the material. Because deposit law does not apply to electronic publications, the NLC must negotiate for receipt or access. Materials archived by the NLC are organized by title and broad Dewey classifications. Currently
monograph and serials titles lists are separately maintained. It is possible to perform a keyword search of titles on the Web as well as search by keyword fulltext html or ascii publications. All titles are catalogued in AMICUS.

To ensure the integrity and authenticity of information, the NLC tries to acquire the electronic materials as soon after publication as possible from the originator and not from a secondary source. The NLC collects multiple versions of a publication because it cannot yet be determined which version or format is the best to preserve. The NLC attempts to label "out dated" versions as such in the belief that it is important to preserve older items while realizing that different "editions" of publications in the electronic environment are not always apparent to the user.

To ensure completeness, the NLC does not acquire electronic publications which are abridgements, abstracts, or table of contents only, or promotional sites. Serials are checked in, but automated claiming is still in the future. Use of current non-proprietary technology, wherever possible, provides assurance of access. A concern of the NLC is that some formats are not accessible to text-based browsers. Another concern is formats that require proprietary viewers, such as .pdf files. The fear is that the future may bring with it difficult conversion responsibilities.

Survivability of information is another goal of archiving. The NLC refreshes information through daily back-ups. The NLC selects formats which can migrate when the need arises. The NLC uses a hierarchical storage management system which supports migration, including on-line, near-line, and off-line access. The NLC avoids archiving very dynamic and software dependent information resources.

The NLC is involved in several short and long term activities. Short term activities include reorganizing the collection to support permanent URLs, refining selection criteria to balance needs of completeness, ease of acquisition and assurance of access, and creating a closer integration with the bibliographic database. Long term activities include monitoring the experience and research of others, facilitating cooperative digital library initiatives in Canada, and establishing a digital library infrastructure.

Following Brodie's prepared talk was a short question and answer period.

Project 4: A Method out of the Madness: OhioLINK's Collaborative Response to the Serials Crisis
Barbara Winters, Assistant Director for Collection Development, Wright State University; Tom Sanville, Executive Director, OhioLINK
Reported by Cheryl Riley

Barbara Winters and Tom Sanville utilized the tag team approach to explain how the OhioLINK community and individual libraries are attempting to leverage their collective resources to reverse the downward spiral of increasing serial prices and decreasing subscriptions. OhioLINK has contracted with Academic Press for electronic access to their entire journal collection. Each library continues to pay the cost for their print Academic Press journals plus an additional charge to OhioLINK. The combination of the print subscription cost and OhioLINK's charge will not exceed what an individual subscriber would pay to maintain their print subscriptions into the future. In return, each library has electronic access to all Academic Press journals, regardless of their print subscriptions.

The first point made by the presenters is that the death spiral is real and that librarians will continue to ration rather than expand traditional serial subscriptions. OhioLINK statistics indicate an aggregate of 65% of materials' budgets are spent on serials. Between 1993-1996, OhioLINK libraries saw a 16% rise in subscription dollars and a 1% decline in subscriptions.

Sanville raised the following questions about solutions to the serials crisis: which is better, rationing or expanding; can the user access...
more titles than before; can the user receive the information more quickly; can the user retrieve the information themselves; are there more, less, or equal points of access; and, what are the cost implications for the user and the information supplier. Winters discussed the impracticalities of cooperative collecting: it only works when access to the item is almost as immediate as having the item in your library; the time/energy involved is a deterrent; and the complexity of issues involved are a deterrent.

OhioLINK's objective was to empower faculty and students to maximize utilization of information resources. Several underlying assumptions influenced OhioLINK's solution: past use levels are poor predictors for electronic information; improved access leads to expanded use; increased journal usage is preferable to rationing cost; there needs to be a way to make journals a better value; libraries cannot wait for the revolution; and "the view for the publisher isn't all that rosy either." OhioLINK determined a new equation was needed to stabilize the economic equation for both publishers and libraries, as well as create an environment that increased access and value of journals.

OhioLINK's answer was the group subscription solution. This method subscribes to the intellectual content, not the delivery medium. The objective was to acquire as much as possible for the group, realizing that individual libraries might have to pay more to get more. This resulted in OhioLINK contracting with Academic Press for electronic access to each journal they publish. (Reportorial note: Academic publisher group license deals have some incremental cost over current print subscription costs which is paid in exchange for the greatly expanded access throughout the consortia. This increment, as defined in the multi-year license, is hoped to be less than what it would cost each library to maintain their print subscriptions into the future, individually. How the license is divided and paid for by the consortium members will vary consortium by consortium.) For OhioLINK, individual libraries pay the subscription cost of their print subscriptions plus an additional percentage; the combination of the two will not exceed what an individual subscriber would pay to maintain their print. Sanville stressed that although paying more to get more, price increases are controlled, expenditures are leveraged, and a stable revenue stream is generated for the publisher.

Several group licensing issues were addressed by Sanville: content and timeliness of information; is access provided by the publisher, third party, or consortia system; use and access after cancellation; authorized users; copying/downloading rights; print cancellation credits; and content withdrawal and addition contract provisions.

In conclusion, Sanville acknowledged this approach was not for everyone. There are risks and not everyone is a risk taker. This approach leverages money, provides more access, results in more use, and allows one "to dance with the devil." Sanville and Winters, however, are convinced this approach is a better bridge to the future and the cost/benefit is worthwhile to the group.

Winters then provided the group with two handouts detailing how this collaborative approach looks in the acquisitions arena at Wright State University. She stressed that projects like this require manual input of cost data, because of the data complexity (a point reiterated by Sanville). Winters felt that the OhioLINK project has not yet reached critical mass, but is a cost-efficiency based model.

Project 5: New Ways of Working Together
Gary Olson, Professor and Associate Dean, School of Information, University of Michigan
Reported by Ann Kolodzey

New technologies in computing and communication have changed the way people do research and share knowledge. Gary Olson shared some of the results of Project CREW (The Collaboratory for Research on Electronic Work) and described the new structure of the University of Michigan School of Information.
Research into how people work together has led to some surprising results. Much as might be expected, people working in groups become less productive as the size of the group increases due to the time it takes to coordinate efforts and the possibility of individual "loafing." Face-to-face meetings present more problems as numbers and distances increase. As the physical distance between the members of a group increases the productivity decreases. Studies show that even e-mail has not affected this "30 meter rule." Economic restraints also increase with the numbers of people and geographic distances involved.

The Boromean Rings model of three interlinked rings can be used to describe the interaction of people, technology, and information in the new knowledge environments. If one ring is not present, the other two fall apart, just as the interaction among people, technology, and information is weakened if any one of the three is missing.

Specific examples of new tools used by people working together were described. Video conferencing has been studied since the 1960's; there is no evidence that video adds to the audio communication, except when used by non-native speakers. Common work space, such as computer screens of information, did add to the productivity of work handled in remote locations when used in conjunction with telephones. Collaboratories (collaboration + laboratories) arose in the 1980's when it became possible to link data collection with researchers globally. For example, in the Upper Atmospheric Research Collaboratory, rather than a few hardy souls traveling to Greenland to obtain data in a small trailer, many researchers can access the data "real-time" in the comfort of their own offices and then communicate with each other via the Internet. Digital libraries are appearing around the world as collections of information with various user interfaces. Students studying the river behind their school can then connect to the Internet for information about what they find. Digital libraries exhibit great diversity both in their collections and their users, necessitating creative interfaces. Again, information, technology, and people are intertwined in new and ever changing ways. These technological advances have been largely funded by grants and future economic models are uncertain.

At the University of Michigan, the School of Information (formerly the School of Information and Library Science, and before that the School of Library Science) has been transformed. The current Dean comes from a computer science background; Dr. Olsen, the presenter of this project session and the Associate Dean, comes from a background in psychology. The 48 credit degree of Master in Information Science is attained through a program consisting of 15 credits in general information management, 18 credits in traditional library courses, the human-technology interface or archives and record management, and 15 credits in practical engagement. The School of Information sees itself as the hub of the university and envisions joint faculty appointments and joint degrees. The training of future information professionals is an exciting area; ALA, during the initial accreditation phase, seems to be supportive of the University of Michigan's approach to the education needed.

Project 6: SGML for Yesterday and Tomorrow: the Role of Structure in Access

John Price-Wilkin, Head, Digital Library Production Service, University of Michigan; Christina Kelleher Powell, Coordinator, Humanities Text Initiative, University of Michigan

Reported by Leslie Horner Button

John Price-Wilkin opened this session. While he acknowledged the critical role standardized general markup language (SGML) plays in storage and retrieval of information that is part of the Digital Library Initiatives at the University of Michigan, he stated that the focus of this presentation would be on the Humanities Text Initiative (HTI). He then provided an historical overview of the HTI, the oldest component of the University of Michigan's Digital Library Program and one of many projects currently in progress. Its origins
date back to 1989, when the University of Michigan Library decided to develop a text analysis framework. A robust computer network was in place at that time, and users could dial in and get access to computers. However, the University of Michigan Library wanted to take an additional step for their user community by creating a collection of texts in a standardized format suitable for a number of applications. They knew it was possible to create such an environment because of the existing infrastructure. They recognized also that it would be expensive to implement; if the effort was not undertaken in a manner that would endure through the ages, it was not worth doing.

With support from the university administration, the Digital Library Program was launched. To help ensure that the electronic resources would remain viable for future users, SGML was used as the underlying structure to support the digital collection. In 1993, the World Wide Web appeared. It offered the possibility of presenting the encoded texts in hypertext markup language (HTML). The emphasis of the HTI until this point had been weighted toward analysis of material, rather than delivery, but the Web gave them the capability of doing both simultaneously.

During 1993, the University of Michigan Information Technology Division, the School of Information, and the University Library jointly launched a program to address the campus environment for network information sources and create a broadly defined "digital library." Under this joint venture, a number of projects have developed which have built digital content and allowed key infrastructure elements to be put into place. At this writing, the Digital Library initiatives are beginning to develop support for numeric data and have amassed over two million pages of encoded text as well as two million images. The texts which were part of the original initiative are still available online today and according to Price-Wilkin, the University of Michigan effort is gaining momentum to become a "real digital library."

The second speaker, Christina Kelleher Powell, addressed the structure and content of the HTI. The HTI, which is coded in SGML, is both an internally and externally created collection, meaning that the HTI gets data from a variety of sources. Some are produced by publishers, either where the publisher creates it as an electronic resources or where publishers use electronic technology to generate a print product and then realize the electronic version that remains can be sold to create another revenue source. Some of the sources are from vendors, such as Chadwyck-Healey, who are in business to make a profit. These vendors often create an electronic product and sell it commercially. Other products come from universities, consortia or research units.

When the HTI acquires a product, as opposed to creating it themselves, staff analyze the data and implement it. This involves examining the document type definition (dtd). The dtd defines how the document is marked-up (so the programmer knows what to expect), how the structure is defined, what parts it contains, how large the articles are, how big the images are, if there are cross-references, and so on. Staff members then determine the structure to retrieve the data and how it displays.

Once they understand the underlying structure, HTI staff assesses the potential use and how the campus community might want to use it. In a university setting, users often want to analyze the information, which is more complicated for programmers to achieve. HTI staff and other library staff solicit information from the user community to obtain feedback on how to make the product more useful. Computer programs are created behind the scenes which allow the product to display in the best manner possible. The product is brought online for "beta testing," the user community is consulted; and the display is revised until it meets the user needs. The effort results in a seamless display of a wide variety of products that differ significantly from one another.
Christina then demonstrated a few of the products that are part of the HTI. The first was Physicians GenkRx, a commercial product which has been fairly complex for staff to make available to the user community. Next she showed attendees the Middle English Collection, a completely electronic resource which links the Middle English Dictionary to the Hyperbibliography of Middle English. The links to the texts are part of the HTI. Next was the American Verse Project. The ultimate goal of this project is to encode all American poetry up to 1920. The American Verse Project is being created internally at the HTI. Staff developed a bibliography of American poetry held at the University of Michigan Library, retrieved items from the stacks, and set up a system of marking up the texts using SGML and scanning them into a computer. The final product she demonstrated was Making of America, a project funded by the Andrew W. Mellon Foundation. University of Michigan and Cornell University are collaborating jointly on this venture to create a thematically related digital library dealing with American social history. As with other HTI initiatives, its underlying structure is built around SGML. While it focuses predominantly on monographs, there will be eight journals included in this digital resource.

Christina outlined some of the benefits she saw which evolved from the HTI: collection building through document analysis and indexing, the expert system building, and partnering with other institutions. She closed by stating she believes that future efforts in building digital collections will come from universities rather than from publishers. The Web address for the DLPS and its components is: http://www.umdl.umich.edu

WORKSHOP SAMPLER

[Ed. note: As in the past two years, our intrepid corps of reporters has been able to provide you with a taste of some — but not all — workshops. Enjoy.]

Workshop 3: The Accidental Trainer: Techniques in Technical Training

Cathy Kellum, Training Supervisor for OCLC Services, Southeast Library Network (SOLINET)

Reported by Nancy Chaffin

This workshop was designed to share with the audience information on designing and presenting technical training sessions, based on Cathy Kellum's extensive experience in conducting training workshops for SOLINET.

In her experience, about 80% of the trainers she has encountered have not been formally taught how to train, resulting in a less than optimum training experience for both the learners and the teachers. In this age of rapidly changing technology, organizational needs for cross-training, and turnover in the workplace, all libraries need to provide training and need to provide as effective training as possible. This workshop could not take the place of real formal training, but should have improved the effectiveness as trainers for those attending.

Planning is essential. Planning should include needs assessment, defined objectives, appropriate handouts, additional training materials (overheads, defined exercises, etc.) as appropriate, and a written script. Plan the type of training that will be appropriate to the type of learning desired. The training for a broad understanding of a concept will require different activities than would be needed to develop a specific set of skills. It is also prudent to be prepared for "technical difficulties," ranging from the layout of the room (perhaps the room is not conducive to group discussion, which you had planned), to the more obvious telnet connections that don't work or overhead projectors with burnt out light bulbs. Kellum's handout was a good example of "contingency planning." It was a

And the Winners Are....

From a drawing of name badges at the 1997 conference, Pat Wallace presented prizes representative of the Boulder site to: Don Tribit (Millersville University) who won a tee shirt from the University of Colorado; and to Arlene Sievers (Case Western Reserve University) - Buff, the Buffalo mascot of the university.
printout of the slides she used, and because the room was very long and narrow, people sitting at the back were still able to follow using the handout.

Personal preparation for the trainer should include practicing delivery, wearing comfortable clothing, being prepared for the unexpected, developing a sense of humor (people learn best when they are having fun), and understanding the differing learning styles of those in the audience. A specific example is that catalogers tend to be "step-by-step" learners, while reference folks tend to learn best during a non-sequential set of activities.

Kellum identified the major types of instruction designs, when each would be appropriate, and the advantages and drawbacks of each. Similarly, she described various media for presentation, what could (and could not) be done with each, and the respective advantages and disadvantages.

Kellum concluded by encouraging the attendees to think about their training needs and find ways to use the techniques discussed during her presentation. She also gave the audience a list of additional resources on training as part of her handout.

Workshop 4: Managing Electronic Journals in Times of Change
Linda Rich, Reference Librarian, Bowling Green State University; Julie Rabine, Humanities Bibliographer, Bowling Green State University
Reported by Mike Beier

With the continuing development and proliferation of electronic journals, many librarians are searching for ideas that will help them best manage these resources to meet the institutional needs of their students, faculty, and libraries. This presentation explained the process, followed by the presenters, for making these decisions and demonstrated the e-journal access that they have developed at Bowling Green State University.

Historically, e-journals started development around 1980, with the creation of listservs that distributed current research findings electronically. The current definition of e-journals would technically include e-mail listservs, gopher clients, Web-zines, and even CD-ROM full-text journals, and perhaps other areas. The project discussed was developed around WWW access materials.

Initially one significant purpose for this project was to improve public relations with faculty who were understandably upset with the latest round of journal "deselection" because of budget constraints. Linda Rich and Julie Rabine were assigned a project to create a Web page that would bring together full-text scholarly electronic journals that would support the curriculum at the university.

They began by making a study of the literature concerning e-journals to fully understand the definitions, variations, types, accessibility, advantages, and disadvantages of this information source.

Next, they set the objectives for the project which included:
1) Identify open-access e-journals that support BGSU curriculum;
2) Provide easy e-journal access for BGSU patrons;
3) Develop the Web page;
4) Develop annotations for each e-journal for "added value";
5) List each e-journal selection on the online public access catalog.

Selection criteria for the e-journals were quite restrictive. This helped set reasonable limits for the project. The selection criteria stated that the journal must have open access (free), be full-text, be peer-reviewed, have Web or gopher access, be indexed onsite or in a standard index, be in the English language, be archived on the Web, and be supportive of the BGSU curriculum and/or faculty research.

Several important sources were very helpful in identifying what e-journals were available to be considered for possible selection. These source aids included: ARL's Directory of Electronic Journals, Newsletters, and
Academic Discussion Lists, NewJour Listserv, Web sites listing e-journals, and recommendations from colleagues. While selecting the journals, it was also important to determine what content to include about selected e-journals. When this was done, a template was created, and the selected sources descriptions and links were added to the Web page.

A useful part of the presentation was a discussion of the problems encountered and some solutions suggested. For example, their Web page came online providing access to some 40+ e-journals, but with the state consortium acquiring access to some commercially prepared full-text e-journals numbering in the hundreds, the decision to include all locally accessible e-journals on the OPAC has been modified to state that only the significant curriculum supporting titles will be added to the OPAC. Other time saving, money saving, and access factors were also discussed.

Workshop 7: Partnering in a Changing Medium: The Challenges of Managing and Delivering E-Journals

James Mouw, Head of Serials, University of Chicago; Taissa Kusma, Director of Online Product Development, Academic Press; Sharon Cline McKay, Technical Sales Manager, Blackwell's Periodicals
Reported by Cynthia Crooker

This session provided a very helpful overview of the issues involved in electronic journals from three different perspectives.

James Mouw led off with "Changing Roles — The Library Perspective." He started by describing the players within the library and their traditional functions of selection, ordering and receiving, cataloging, and maintenance (preservation, shelving). He contrasted this with the many new issues and questions which have arisen in the electronic environment (titles may be acquired individually or in various aggregations, titles may be leased or purchased, a product's content or access may change, etc.). Consortial agreements among libraries are increasing as libraries try to afford new products; in some cases, publishers are actively encouraging the formation of consortia. Mouw also examined the changing roles of libraries with respect to publishers and vendors, again contrasting traditional models with the new ones. There is much more interaction between libraries and publishers and, in some cases, vendors are being left out of the loop. Vendors are competing with publishers or joining with them to offer new products. One result is a blurring of the distinction between information and indexing (e.g. OVID, which provides bibliographic databases like Medline is now offering links to full-text journals as well).

Taissa Kusma of Academic Press focused on the journal publisher's goals. These include expanding readership, making the transition from print to electronic, maintaining the revenue stream in an uncertain environment, maintaining the viability of the journal model (which may be threatened by article delivery services), adding value to e-journals by linking to other resources, and developing new services for subscribers. Publishers must invest in rapidly changing technology, determine what users want (the basic or luxury model?), and manage the migration from existing to new media. Developing a pricing model for e-journals is extremely complex; currently a bewildering array of licensing models exists (individual articles, bundled products, online versions as add-on fees to print subscriptions, free electronic trial versions to print subscribers, online licenses with add-on fees for print version, usage-based pricing, etc.). In conclusion she emphasized the benefits of electronic delivery: expanded resources for users, 24-hour-access from one's office or home, more up-to-date information, better searchability, and cost savings on binding and storage.

The vendor's perspective was given by Sharon Cline McKay of Blackwell's. She listed the aggregator services provided by the vendor, such as integrating many publishers' titles into one access point, providing technical support, and assisting with licensing agreements (including registering IP
addresses and domain names). Vendors would continue to perform other more traditional services such as invoicing, claiming, providing management reports, and document delivery. McKay spoke about the need for partnerships among publishers (who supply content), technology partners (who supply the infrastructure), and libraries (who offer various kinds of expertise). One of the most crucial unsolved issues is archiving, which must be addressed before any research library can think about cancelling its print subscriptions. McKay also examined cost and pricing issues from the vendor's perspective. The goal of the subscription agent or vendor is to make all electronic publications easily available. Despite the many challenges remaining in managing and delivering e-journals, she ended the presentation on an optimistic note by maintaining that we can achieve our goals by working together.

Workshop 8: Full-Text Access Evaluation: Are We Getting the REAL Thing?
Laurie A. Preston, Coordinator of Electronic Reference Services; Corinne Mebbs, Reference/Instruction Librarian, both of the Carrier Library, James Madison University
Reported by Maryon McClary

In this well-organized and informative session, Laurie Preston and Corinne Mebbs presented the findings of their study which compared two issues each of 75 journal titles which were available in full-text format in the IAC's Expanded Academic Index with their print equivalent. Twenty-five titles were selected from each of the Humanities Index, Social Sciences Index and General Science Index to ensure variety in subject coverage and to ensure that core journals were being examined.

Their major observation was that "nothing is consistent in full-text except inconsistency and the journal titles." Their findings were largely consistent across disciplines. Feature articles are usually included although there were cases of missing articles. Poems and fiction (especially short ones) were not consistently included. Most frequently, editorialss, letters, obituaries, new books lists, information about authors (e.g. institutional affiliation), news and announcements, publisher information and advertising are missing — but not always. Sidebars and inserts may be missing or included, but if included, frequently lose their relationship to the original text they are intended to accompany and they can be difficult to access. Book reviews tend to be included but are frequently reformatted as individual items rather than treated, as is the case in the print version, in a separate section.

The study also revealed that full-text sources are often less timely than the print sources. Forty-three per cent of the studied titles were behind one issue, but one title was 40 issues behind. Spot checking of the electronic products of 4-5 other vendors indicated the same problems but to varying degrees. Full-text presents several access issues as well. It is the presenters' experience that users have difficulty browsing full-text sources and locating articles for which they have full citations. Talking with vendors and educating them about the needs of libraries and varying approaches that library users take to locating information was strongly advocated.

After reporting their study results, the presenters reviewed their proposed model for evaluating full-text sources and provided audience members with a format for doing an institutional profile, profile of expectations, and suggestions for comparative spot checking between print issues and the full-text sources being considered. Their model includes self-evaluation, reviewing collection policies, obtaining a trial subscription, learning about and working closely with campus computing on system requirements (especially printing), and understanding the licensing/use restrictions associated with the product. Applying the model includes a detailed hands-on evaluation of the product (ascertain criteria for content inclusion, check how images display, check the accuracy of the vendor's title list, check for timeliness, investigate how printing works, etc.) plus making decisions about backfile and subscription retention and how users and staff will know what is covered in the full text.
source (e.g. will titles in the full text source be included in the catalog? will ILL staff check full text sources before sending out requests?).

In the question period, the importance of working closely with vendors of full-text sources was emphasized. Feedback on what works and doesn't work for libraries must be provided to vendors if we wish to influence and improve the products we provide to our users. The point was made that perhaps our language is part of the problem in discussion of full-text sources. We lack the vocabulary to clearly distinguish between e-journals and full-text sources which may be more appropriately described as full text articles rather than full text journals. For further information and copies of the presenters model see: http://www.jmu.edu/library/NASIG/index.htm

**Workshop 10: Creativity in Serials Cataloging: Heresy or Necessity**

*Wendy Baia, Head, Serials Cataloging, University of Colorado at Boulder; Kevin Randall, Head of Serials Cataloging, Northwestern University*

Reported by Regina Beach

The title of this presentation did not give any indication, but this was mostly a discussion of latest entry cataloging. While successive entry has been standard, accepted practice for some time, at least two major university libraries are going against the standard.

University of Colorado at Boulder has been using latest entry since November 1992 for much of their cataloging. Three cases that are the exception to this local practice are when volume numbering of the new title in a title change begins again with volume 1, analyzed serials, and splits/merges. Successive entry is preferable in situations when latest entry would create a very long record or when the scope of the serial changes.

**Wendy Baia** defended latest entry cataloging with a few significant arguments. Most importantly, there are fewer records in the database, which are simpler for patrons to understand than a screenful of title changes.

Also successive entry works better in a card environment where there can be see references between title changes. Adding title changes to a single card may create space problems as well.

**Kevin Randall** gave some examples of different situations at his library where latest entry was formerly used as well as some innovations to circumvent local system (NOTIS) problems. Recently Northwestern switched entirely to successive entry cataloging with the possibility that they soon may be becoming a CONSER library. Looseleaf services, periodicals with cumulative issues/volumes, and cumulative indexes were all cataloged using latest entry cataloging. NOTIS indexes qualified titles by place of publication. Serials catalogers at Northwestern add a locally defined field, 299, that accommodates changes in place of publication. Also, an author/title entry is added in a 710 for items with generic variant titles, rather than using a 245. 130 and 245 field are secondary sorts for each other in NOTIS. This has the effect of hiding serial titles. Northwestern’s solution was to add a 730 field.

The question and answer session generated the most notable flaw with latest entry cataloging. It will work best with serial collections that are classified. Alphabetically filed collections would need see reference “dummies” inserted into them for each title change.

**Workshop 11: Fitting Preservation into Your Life: Preservation Basics for Serialists**

*Jane Hedberg, Serials Librarian and Preservation Administrator, Clapp Library, Wellesley College; Jeanne Drewes, Head, Preservation Dept., Milton S. Eisenhower Library, Johns Hopkins University*

Reported by Valerie Bross

The problem of how to extend the life of our materials is immediate and enduring. Those lucky enough to hear Jane Hedberg and Jeanne Drewes came away with a sense of satisfaction in learning valuable information,
and a sense of frustration — of needing to know more. As Jane Hedberg pointed out at the beginning of the session, the topic is well-suited to a two-week workshop — we had two hours.

Jane Hedberg introduced definitions of preservation and conservation, and the "prime directive:" first do no harm. She explained how cellulose fibers are shortened to make paper and how "grain" (the dominant direction of the fibers) affects the behavior of paper. She then outlined a framework for preservation activities. Issues to consider in developing preservation activities for serials include: staff and user education, storage and housekeeping, environmental control, security, and disaster preparedness.

Next, she discussed in greater depth three issues in preservation for paper-based serials: acidity, binding, and microform types. Ms. Hedberg demonstrated the use of a pH pen on a restroom towel, showing that nowadays — in contrast with the late 19th-early 20th century — coarse paper tends to be alkaline rather than acidic. She also shared with the group news of the Library Binding Institute standard under revision. The new standard will be performance-based and will incorporate recent research in behavior of paper and durability of binding materials. Finally, she reviewed the strengths and weaknesses of silver, vesicular, and diazo films.

Jeanne Drewes picked up where Hedberg left off — with a discussion of microfilm. She emphasized that the "best" type of film to acquire depends on intended use. Silver halide, for example, has great precision but scratches easily. Drewes also briefly discussed accompanying materials ("pesky materials"), compact discs, and other electronic formats. She rejected the "easy-answer" approach to choices, suggesting instead a more careful consideration based on use, durability, availability of replacements, and cost.

Excellent handouts accompanied this presentation, including: an outline for each of the segments, a select bibliography, and a list of Web sites. First on the list of Web sites was Conservation Online, at: http://palimpsest.stanford.edu/

Workshop 12: "Mockingbird" — UTK's Prototype Consolidated Serials Information Database

Kathryn D. Ellis, Systems Librarian for Acquisitions & Processing; Alice Duhon Mancini, Collection Development Librarian, both at the University of Tennessee, Knoxville Libraries

Reported by Anne Frohlich

"Mockingbird" combines serials information from a variety of sources into one database accessible via the World Wide Web. It contains information on titles in the University of Tennessee, Knoxville (UTK) collection, plus titles indexed in Current Contents, Medline, UMI, Uncover, and others, regardless of whether UTK subscribes to them or not. In addition to basic bibliographic information, "Mockingbird" contains local subscription information (call number, price history, fund code, etc.); title abbreviations from Current Contents and Medline; reciprocal lenders; availability in full-text online or from commercial document suppliers; indexing coverage; and notes. "Mockingbird" enables users to tell from one record whether the library owns a title and if so, its call number; if a title is easily available from other sources; where a title is indexed; and price history for subscriptions.

"Mockingbird" is an attempt to provide serials management information to various groups of users. Collecting the data involved cooperation among units within UTK Libraries and with commercial indexing and document supply organizations. Complex Perl programming combined disparate data into a single, unified format. A Web interface provides searching and browsing access. One application of "Mockingbird" is "Journals Online News," designed to help selectors and faculty representatives with an ongoing journals evaluation process. Many significant challenges remain, such as keeping the database current, linking the database with
the library's new integrated library system, and improved searching capabilities.

The purpose of the "Mockingbird" project is to improve coordination of journal information among teams collecting different kinds of data relating to the problems of bibliographic and physical access to scholarly journals. "Mockingbird" combines information found in other databases, online resources, and reference materials into one united decision support system.

"Mockingbird" may be examined by going to http://scholar.lib.utk.edu/mockingbird/newmbird/mbirdtitle.html

Workshop 15: Planning and Budgeting the Transition to a Digital Tomorrow
Karen Newsome, Information Access Team Leader, Joanne Martinez, Science-Engineering Librarian, both of the University of Arizona
Reported by Maryon McClary

Karen Newsome and Joanne Martinez described the structure used for planning, budgeting, and production at the University of Arizona (UA) plus a digitizing project that is being funded as a result of the institution's commitment to moving into the digital future. Budgeting and planning are one set of library roles which influence the other roles (production, use, providing access, and relationships) that UA has identified. Once priorities are established, a plan is developed and then UA budgets to the plan. Both functional team objectives (e.g. information resources funding) and strategic opportunities (e.g. journal backrun digitization) are funded. Allocations guidelines are based on data, customer needs, and library priorities. Allocation priorities are electronic access, document delivery, and serials plus cooperative purchasing across subject disciplines, with academic departments and with other institutions. Guidelines in conjunction with priorities form the basis of fund allocation.

One of the identified library roles is to become involved in the production/conversion of information that will lead to the digital future. The proposal by the Science-Engineering Library to explore issues involved in digitizing journal backruns was partially funded through the library budget allocation process and partially by the chosen partner for the project, the Society for Molecular Biology and Evolution. Based on stated selection criteria (e.g. potential for adding new value, existing staff knowledge of subject area, usefulness of previously published materials etc.), the 13 volume backrun of the Society's Journal of Molecular Biology and Evolution was chosen for digitization. The project creates opportunities for exploring the necessary relationships among libraries, faculty, and scholarly societies that the digital future will involve; for investigating the issues involved in the transfer of intellectual property rights; the types of equipment and staff skills that will be necessary; and for determining the feasibility of digitizing, archiving, and distributing electronic information. The particular Society and Journal were also chosen for strategic reasons — a new journal editor, a move within the Society toward electronic publishing, and the small backrun made the project "do-able" within a reasonable period of time.

Small group discussion gave workshop attendees the opportunity to share and discuss what they saw as the use and access issues that need to be considered as we plan for the digital future.

Workshop 16: Happily Ever after ...
Serials Management in the Time of Change
Josephine Williamson, Head, Acquisitions Department University of Delaware Library
with special guest appearance by Dogbert
Reported by Donna Yanney

The topic of this workshop given by Josephine Williamson was motivating staff in the time of change. As an incentive for her audience to pay attention and participate in the discussion Williamson handed out free pencils from the University of Delaware to all attending.
Williamson began her talk with a story about a happy serials unit that lived a long, long time ago in the sunset years of the kardex. But as all good things must come to an end, so too did the kardex and the happy serials department. Change had arrived in the form of automation and the end of the age of autonomy, mastery, and kinship of serials workers.

Dr. Baard has identified three intrinsic needs that must be met in order to feel motivated about an activity. These needs are autonomy, competency, and a feeling of connectedness with coworkers, supervisors, and the larger organization. During times of change these basic staff needs may not be met; it is the managers job to try to maintain or restore the sense of well-being in her department. In times of change it is important to give your staff the gift of time, a period of adjustment between old routines and new. It is important to keep staff informed and allow them input into decision making processes. Staff should receiving training for their new duties. And, of course, keep the lines of communication open. All of these messages we have heard before.

Williamson introduced the audience to a wonderful book written by Matt Weinstein called Managing to Have Fun. This book contains fifty ideas to help connect staff using laughter and fun. Some of his methods of keeping staff happy and motivated include: creating stress-free zones, collecting souvenirs from the battle, doing something unexpected, transforming the cubicles, bringing toys to work, giving people gifts, celebrating holidays, giving an employee a surprise hour off, and sending a traveling flower bouquet around the office.

Following the talk was a spirited discussion among workshop participants in which they shared stories of how change affected their workplaces and how they survived to tell about it.

Workshop 18: Merger, Reorganization and Technology meet Technical Services
Sharon Wiles-Young, Team Leader, Information Organization, Information Resources; Judy McNally, Senior Specialist, Cataloging, Information Resources, both of Lehigh University
Jos Anemaet, Reporter

Sharon Wiles-Young opened the workshop with some background information on Lehigh University to explain the merger and reorganization at her institution. This private, 6,000 student institution initiated many changes in the last several years, in particular since 1995, when they migrated from Geac 8000 to SIRS On-line. Since then, much of the campus was wired to access the Internet, their local area network, and all campus supported software. By next year, all staff will be on Pentium machines running Windows95. With the heavy emphasis on electronic resources plus the change in on-line systems and the need to house the server in Computing, collaboration between the latter and the Library had increased to the point where it seemed logical to merge the two with Media Services, telecommunications, and Network Support into one Information Resources organization when the university was compelled to scale back operations. And in a further effort to cut costs, the library also lost nine non-exempt (classified) and three exempt (professional) positions, including the library director, as a result of an early retirement program offered by the university.

This was the situation Arnold Hirshon found when he was hired for the newly created position of Vice-Provost for Information Resources. Wiles-Young emphasized that full staff involvement in the reorganization was sought from the beginning. For instance, at a Saturday retreat, staff worked on the mission statement that helped shape the strategic plan that was ultimately adopted after much work by several planning teams. The names of the six Group leaders were announced first, followed a week later, on June 5th 1996, by those of the Team leaders. All staff had been given the opportunity to list the three jobs they most preferred in the new organization, with
the understanding that they might not be selected for their top choices. By the end of the month all positions had been filled and the corresponding salaries set. No jobs had been eliminated; two-thirds of the classified salaries remained the same; most of the rest were raised and a few lowered.

Wiles-Young is the Team Leader for the Information Organization Services (IOS) team consisting of the former Cataloging, Acquisitions, Serials, Government Documents, Web Interface Design and Management, and OPAC Support divisions. As compensation for the loss through retirement or transfers of two FTE professionals and three classified staff, Technical Services was assigned one data-entry clerk from Administrative Computing who had never worked in a library. Her training as well as cross-training of other staff to cover their expanded responsibilities fell to Judy McNally, Senior Specialist (Cataloging), our second presenter.

As if that were not enough, McNally reported that the SIRSI version 8 upgrade they received that summer, wiped out all locally defined and some indexing parameters; they submitted an RFP for a new periodicals vendor, the Computing people moved into the library, driving Cataloging from their accustomed home on the first to the fourth floor, and the College of Education asked them to catalog their entire collection before their accreditation review in the Spring of 1997. Little wonder that they needed to reevaluate their workloads and consider alternatives. Thus, it was decided that the functions performed by the media and authorities cataloger, who had left, were good candidates for outsourcing.

In spite of all this, McNally claimed that IOS fared better than some of the other teams, because they retained most of their staff. In answer to a question, Wiles-Young explained that staff in the Computing Infrastructure team, for instance, have more opportunities to find positions in the local area, so as dissatisfaction grew, they had greater freedom to change jobs. From the comments and questions during and after the presentation, it seemed that most in the audience were either faced with reorganizations and/or mergers, or they were already struggling with the consequences of similar measures at their own institutions. After only one year, the presenters did not yet have a clear idea how the reorganization will unfold, but Wiles-Young expressed cautious optimism; she enjoyed the increased opportunities to meet with and understand the concerns of their colleagues in other areas of Information Resources.

Workshop 19: Cataloging Electronic Serials

Steve Shadle, Serials Cataloger, University of Washington; Les Hawkins, ISSN Network Cataloger, National Serials Data Program, Library of Congress

Reported by Regina Beach

This workshop was essentially a series of electronic journal examples that represented a problem type in cataloging in this challenging new format.

In this new medium what is and what is not a serial is often blurred, but Steve Shadle and Les Hawkins helped clear that up. CONSER policy in cataloging remote access serials is to follow the AACR2 definition of what constitutes a serial — "A publication in any medium issued in successive parts, bearing numeric or chronological designations and intended to be continued indefinitely." Some common online manifestations that do not fall into this category include homepages, Webpages, many online databases, and listservs.

Electronic serials are so volatile, that many professionals question the value in time spent cataloging them. Every library considering cataloging this type of material must ask itself about the level of service it wants to provide to its patrons in this format. The Internet has junk as well as gems — the same as in the print world — but many librarians have not gone past the junk to realize that there are resources of value on the Internet. These should be treated the same as any other format in the catalog. Many print sources are
duplicated on the Internet as well. Also, as much as some catalogers may shudder at the thought, cataloging records are used for acquisition department record keeping. There must be a record in the catalog in order for them to do this with the purchase of Internet resources. In addition, some innovative libraries have used their Web OPAC as an Internet gateway.

There are many issues in cataloging electronic serials that Savage and Hawkins covered in detail, but space constraints limits mentioning all of them. However, chief among them is the ongoing multiple versions debate. This issue sparked a great deal of audience participation. CONSER libraries are, at this point, using a record for each format. As an interim solution, however, while the debate rages onward, other libraries have the option of using one record. Other changes on the horizon include a more specific GMD ("electronic resource") and second indicators in the 856 to provide more information about that field.

**Workshop 20: What's Next? An Exploration of the Next Phase in Access to Electronic Information**


Reported by Mike Beier

Before beginning this workshop, the presenters distributed identifying tags to each person as they entered the room which first identified them as a librarian, publisher, or vendor, and then assigned them to a team. It was important to identify the profession of the participants to make sure each team had representation from each of the professions.

It was explained that we were going to be involved in an interactive workshop modeled after a presentation given by a Boston based research group, Northwest Consulting Resources, Inc., that was designed to let us think outside our current role, while considering the rapidly changing developments that affect the library/vendor/publisher roles. To prepare us for the individual group discussions, the facilitators quickly led the group in a consideration of the state of flux that encompass each element of the profession, with the roles of each group expanding, and dividing lines between each group blurring. Many of the current concepts and "buzz words" of these times were tossed into the mix for us to consider, and to prime us for our group discussions, these included: partnerships, added value, virtual file cabinets, distributed searching, cross platform standards, underactivity, linking, advanced abstracts, etc.

Once prepped, we were organized into the six groups of from 8 to 12 participants, and separated into the groups around the room. The ground rules were given to the groups which included:

1) Each group was assigned its "point of view" -- that of the librarian, publisher, or vendor.
2) We were given a set of 22 cards that listed important developments that would effect the various elements in the book trades. From these, each group was to select the 10 events which would probably have the most impact on their profession.
3) The groups would then rank the events, and prepare a 5 minute presentation on what these events would mean to librarians, vendors, publishers, end users, and the scholarly community, as based on their 10 selections, and their assigned point of view.

The results of the exercise were educational. It was interesting to see how strongly the assigned point of view affected not only what a group chose to select from the 22 cards, but how they interpreted the same event to have significantly different results. What was really thought provoking was that a number of the things that were listed on the cards were contemporary developments. These weren't developments that were off in the future, but the impact of these developments is affecting the way we do our jobs and interact with other elements of the profession now. It seemed
especially worthwhile for long range communication and understanding, for us all to be able to step out of our own shoes and briefly experience how others may view, and react to, the same events so that we can plan and work together effectively.

Workshop 22: Planning for the Millennium: a Medical Library Ponders the Serial World
Kimberly J. Laird, Technical Services Librarian/Assistant Professor, Medical Library, James H. Quillen College of Medicine, East Tennessee State University; Mary Fugle, Director of Publisher Relations, Blackwell’s Periodicals
Reported by Sheila Moran

This was an interactive participant workshop conducted by Kimberly Laird and Mary Fugle that pondered our users’ needs in a climate of electronic formats and resource sharing with local libraries. Questions ran the gamut from: “Will serial publications disappear completely?” to “Will serial librarians disappear like the dinosaurs?”

In a lively discussion, it was felt that serial publications would continue for a number of reasons: 1) serials are too profitable; 2) authors want their work validated in the best journals; 3) researchers want to do the science, but they do not necessarily want to publish; 4) scientists do not want to publish on the Web, but would publish there if there was a need for cutting edge science.

“Is the sky falling?” became “No, the sky is changing as technology changes.” Librarians in the future will be more involved in organizing the content of internal databases. Because scientists have difficulty in grammatically expressing their ideas, it was also felt that there is a role for the librarian in editing manuscripts for scientists.

The archival issue would not go away. Federal and state depositories were rejected as possibilities — rather some independent group might fill this void and result in a museum of old journals. For print, the individual library has done the archiving, but to archive in the digitized world is too great a task for individual libraries to take on, and so we look elsewhere for an answer.

The vision for the future revolved around focusing on our customers. To know what the user wants involves multiple measurements and asking the right questions. Collaboration was also a big theme especially with scientists; for a library to work for scientists, the old print material must be made available as well as the electronic format. Librarians must use common sense and good processes in determining what materials should be in the collection. Canceling subscriptions is not a bad thing. Titles can always come back if the data supports this decision.

NETWORKING NODES

Serials Cataloging
Steve Oberg, University of Chicago; Pamela Simpson, Pennsylvania State University, co-conveners
Reported by Pamela Simpson

The Serials Cataloging Networking Node met with about eighty people in attendance. Jean Hirons of the Library of Congress and Crystal Graham of the University of California San Diego presented an overview of their paper on issues in seriality to be given at the International Conference on the Principles and Future Development of AACR2. The October 1997 conference will be held in Toronto, and is sponsored by the Joint Steering Committee for Revisions of AACR. Hirons and Graham’s paper presents several models of seriality. It divides the bibliographic universe into static items, which include both single and multi-part monographs, and ongoing items, which include looseleafs, continuously updated databases, electronic journals employing alternative bundling techniques, as well as successively issued items with numbering that meet the current AACR2 definition of a serial. Hirons and Graham present alternative scenarios pushing the definition of serial further and further along the continuum between monograph and serial as they have been traditionally defined.
Lively discussion included questions of bibliographic treatment of items such as continuously updating databases, an experiment to catalog such items using latest entry techniques, and the number of records for multiple versions of the same intellectual work. The authors urged the serials community to read all of the papers from the Toronto conference and to send comments to the Joint Steering Committee.

Gearing up for E-Journal Access
Sharon Cline McKay, Blackwell's Periodicals; David Fisk, Catchword, co-conveners
Reported by Sharon Cline McKay

This lively discussion became a very stream-of-consciousness-like session, and that's how I wrote these notes. It started with librarians' questions that acknowledged a high level of uncertainty about electronic journals, their formats, their viewers, and how they differ from print journals. One person spoke of the need to have standards for e-journals, someone else mentioned concern over the archiving issue - can an e-journal be considered an archive if it is not exactly the same version as the print one?

Discussion on "deals" and how to negotiate them arose; criticism grew about the package deals like Academic Press IDEAL, which some publishers are requiring librarians to accept. A few librarians insisted that publishers are being unrealistic in expecting libraries to buy entire packages rather than selecting the journals they want and can afford. Librarians also said they would like to have articles available on a transactional purchase basis.

One librarian said she felt like a deer caught in the headlights and compared the package deals to the multitude of cable TV channels. Another librarian mentioned that in her library printing was a major problem. Her library doesn't have enough printers to serve the students waiting to use them. Also, the students don't want to use copier machines and print versions of the journals anymore; they would rather wait in a queue for access to the electronic version and a printer.

Another aspect of e-journals was noted: they are available sooner than the print versions. Librarians would like to be able to cancel their print versions: it's not significant enough to lower costs, said one librarian; they need to get rid of it entirely. The issue of what was enough support for patrons arose: enough printers, color printers, enough workstations — all are needed before subscriptions to print journals can be cancelled. Space is a problem for many libraries: they do not have enough room to store increasingly more print journals. However, ARL stats require libraries to have certain titles — another reason libraries cannot cancel their print subscriptions right now.

The archiving issue arose: Who will archive? Will the publisher keep many years of issues on their servers? After a number of years pass, where will all those back issues be kept? Who will maintain and refresh the data? Who will pay for continued maintenance?

The problem of paying for the same title more than once arose: one librarian stated "I cannot and will not pay for something more than once."

Publishers in the audience expressed support for the idea of libraries maintaining access to what they have subscribed to. However, no publisher committed to archiving their issues in perpetuity. Discussion has been conducted on the listserv "Liblicense," on the topic of archiving. Some librarians believe that publishers are ducking the issue. Publishers in the group presented a different view: they are thinking long and hard about the archiving issue. They pointed out that it's not just storage — it's management and refreshing the files so they are continually ready to use. In addition, publishers are commercial entities: if one goes out of business, what happens to the archive? Perhaps the archive could then go into an escrow account.

Hope was expressed for partnerships between libraries and publishers for the archiving issue: perhaps with support from a national library like LC or the British Library. Mary Case of
ARL was reported to have said that discussions on archiving were at the preliminary stages at best: no solution has yet been found.

The issue of licensing arose -- librarians spoke of the need to have things as simple as possible with hardware, software and licensing agreements. Many of the agreements are difficult to read and require the review of university lawyers and an investment of a great deal of time. There was some talk about the need for standardization and simplification of licensing agreements. A comparison was made to the trend of CD-ROMs and how years ago librarians had to cut CD-ROMs in half and send them back to the publisher. Perhaps as publishers get closer to a comfort level in dealing with e-journals, licensing agreements will become simpler and more standardized.

One participant asked, "Why is there a need for complex paperwork between publisher and library? Has a publisher ever sued a library?" The answer: YES -- the Texaco case; also the Kinko's case... Aggregators are getting actively involved in licensing agreements also -- when an aggregator has gone through helping a library set up a licensing agreement once, it is easier doing it again. Publishers present noted that in the UK there were fairly broad standardized agreements coming out, so perhaps there is hope.

Definitions of site, institution, and users were all-important topics in licensing. Satellite campuses and long distance learning play a part in defining "site." The protection of the publishers' revenue is at stake. Someone made the statement that licenses obliterate the need for copyright laws.

The relative advantages and disadvantages of access by IP addresses or usernames/passwords were discussed. Remote access may need to be via username unless secure logons to a server with a scripted menu access can be provided. Usernames also allow features such as alerting services and individual profiles for customizing the system. IP address/domain name access allows for less time in setup and maintenance by the site administrator.

The concept of the aggregator was discussed; definitions vary. Some benefits of using an aggregator are: access to multiple publishers through a single source, integrating many publishers' titles into a single access point, assisting with license negotiations, registering IP addresses and domain names, and combining invoicing for print and e-journal subscriptions.

Suggestions for next year's NASIG: abstracting and indexing services should be better represented in programs; also the issue of archiving e-journals needs more attention.

**USERS GROUPS**

**DRA Users Group**
Reported by June Chressanthis, convener

Seventeen people and a representative from DRA gathered on Sunday. Topics covered included conducting a user study of periodicals, claiming, renewing standing orders, training staff on using the system, changes in displays with the new version of the software, the beta testing of the binding module, checking in indexes with multiple frequencies, checking in newspapers, problems with the Web version of the online catalog, creative uses of status codes, and changing subject headings when global update does not work.

**SIRS Users Group**
Reported by Denise Novak, convener

Nine SIRS users met informally for an hour on Sunday. Denise Novak, CMU Libraries, convened the group and after introductions were made, began with a report of what transpired at the Unicorn Users' group meeting held in Huntsville, AL last month. Version 9 is set for release sometime this summer, and a new product is due soon which will be announced at ALA in San Francisco in June. The rest of the hour was spent asking questions and getting answers on how the
serials module is used at each others libraries and exchanging e-mail addresses. It was great meeting each other; we plan to meet again next year in Boulder, CO.

**Voyager Users Group**
Reported by Maggie Rioux, convener

This was the second year that Endeavor Voyager users have met at NASIG during the time set aside for serials system user groups. Attendance was much increased over last year. This year we had thirteen people representing twelve libraries. Four of these are currently in production with Voyager, one is in the installation phase, two have signed a letter of intent, one is in negotiations, and four are "just looking." Representatives of at least one other Voyager library were at the conference, but they had collapsed in an exhausted heap over their box lunches and refused to move when it was time to walk over to the Modern Language Building for the meeting.

Discussion was lively about all aspects of the Voyager software. Copies of handouts on enhancements and release notes for 3.2.2 which had been distributed at the Voyager Users Group Meeting in April were distributed to attendees who have reached at least the letter of intent stage. There was discussion of reporting mechanisms using SQL front ends and methods of implementing electronic reserves (possibly using the image server) and reserve searches. Questions were raised about the possibility in the future of linking a single circulation piece to multiple MFHD records, rather than just linking a single MFHD record to multiple bib records: this would make cataloging analytics much more effective. Another topic of discussion was how best to deal with searching by series title: attendees indicated a desire to get a series heading hit list as an intermediate level before the list of individual titles. Another item on the attendee wish list was the ability to put a hot-linked 856 field in the MFHD record rather than in the bib record. This would allow the electronic resource to be tied to a "holding" for the electronic version specifically when both print and electronic version are on the same bib record. It was good to have so many interested and active Voyager users at NASIG this year. We all look forward to an even bigger group next year in Boulder.

**DYNIX Users Group**
Reported by Jean Lenville, convener

Greetings! I was to moderate the DYNIX Users Group session at the recent NASIG conference. I am sorry to report that the only attendees were myself and Shelley Neville of Ameritech, whom I had encouraged to come to the conference. Shelley and I had a lovely conversation, but nothing really to report. In checking my list of attendees I see that there were only two other people from Dynix libraries who attended the conference this year, so I don't think anyone can be faulted! I guess the difficulty is planning these meetings in advance, when one is not sure how many people will be "eligible" to attend until one gets there. But I don't know that there is any other solution. So, I just wanted to let you both know why I'm not submitting an official report. Maybe next year!

**Innovative Interfaces Users Group**
Reported by F. Ann Dykas, convener

About twenty-five Innovative Interfaces users met at the Innovative Interface, Inc., Users Group meeting. Bruce Compton, from Innovative Interfaces, was available briefly and fielded a few questions and listed some of the enhancements being made to the system. Bruce reported that there are now two beta sites for Release 11. The number of boxes available in checkin records has been increased from 56 to 84. Changes are being made so that multiple item records can be created with a single keystroke.

Following Bruce's report, users introduced themselves and mentioned areas in which they wanted feedback from the group. Most of the group had been using a III integrated system for less than one and a half years. Asking questions and sharing what each of us has learned was valuable in giving people new knowledge and new ways to operate our local systems. Areas discussed included Testpac,
MeSH indexing, generating statistics, the binding module, and patron initiated requests.

Advice for a library currently working with a Testpac included: check the indexing, make sure serials are included in the Testpac, check staff displays and make sure the order of items on menus is convenient to staff. A decision made at one library which staff later regretted is that 4xx and 8xx fields are in the same field group; they both display and look "stupid." A problem with name authority records was mentioned.

One participant mentioned that MeSH headings were not displaying in a list as they would be filed in a manual catalog. Others noted that III ignores punctuation and subfields, indexing and listing subject headings with character by character alphabetization.

Problems generating statistics were mentioned. Some have worked around the problems by generating reports and counting entries or by manually changing information, such as the cataloging date in the order record.

A participant who will soon be using the Binding Module asked whether notes would print on pull slips. Others answered that they would. A discussion about notes in general and the use of public and internal notes ensued.

Other topics mentioned briefly included: patron-initiated borrowing requests which several libraries will soon begin using and Review Files, which a user mentioned liking.

**Blackwell's Electronic Journal Navigator Users Group Meeting**

Reported by Sharon Cline McKay, convener

Customers and others interested in Blackwell's new service for accessing e-journals gathered at the end of the NASIG conference. Discussions focused on the following topics:

- Building content as a priority
- Enhancements planned
- Pricing
- Specific publishers plans to participate
- Reports produced by the system and custom reports
- Problems faced by librarians that are resolved by the service

For those planning to attend the ALA conference in San Francisco, it was announced that a breakfast meeting was scheduled for Sunday 29 June. At that meeting the group will discuss whether they want to formally organize as a users group and how often meetings will be held.

**NASIG 12th Annual Conference Minutes of the Business Meeting May 30, 1997**

**Welcome & Call to Order**

Beverley Geer, President, convened the meeting at 8:40 a.m. in Rackham Auditorium, University of Michigan, Ann Arbor. She introduced John Tagler, serving as Parliamentarian, and the current Board members.

**Greetings from the UKSG**

Richard Hodson, newly elected chair of the United Kingdom Serials Group (UKSG) and first-timer at NASIG, brought greetings from the UKSG executive offices, committees and members. He reported that 440 delegates attended this year's annual conference in Edinburgh and described how the organization attracts members from all sectors of the serials industry through road shows, seminars, courses, and publications.

**Secretary's Report**

Connie Foster, Secretary, presented highlights of the Board meeting that was held on Wednesday prior to the conference. Julie Gammon moved acceptance of the report; Eleanor Cook seconded the motion. The report was approved. (See Minutes of the Board Meeting in this issue for a complete report of the Board meeting).
Treasurer’s Report

For Treasurer Dan Tonkery, incoming Treasurer Gerry Williams reported that NASIG’s financial position remains strong. The total cash position is $305,289.86. The past two conferences at Duke and University of New Mexico have yielded profits of $23,855.35 and $64,370.16, respectively. Ann Arbor conference expenses have not yet been paid so profitability cannot be determined. Income sources are membership fees (reflecting a membership of 1161 as of May 1), published proceedings, and conference surpluses. E. Cook moved acceptance; J. Gammon seconded. The treasurer’s report was approved.

Awards and Recognitions

President Geer recognized and presented tokens of appreciation to the following members:
1) Outgoing Board Members: Kat McGrath, Julie Gammon, Birdie MacLennan and Dan Tonkery;
2) Outgoing Committee Chairs: Anne McKee (Awards & Recognition), Michele Crump (Continuing Education), Joanne Donovan (Bylaws), Steve Oberg and Maggie Rioux (Electronic Communications), Bee Caraway (Evaluation & Assessment), Judy Johnson (Regional Councils & Membership), and Emma Cuesta (Nominations & Elections);
3) Special awards to Lynne Murphy and Rogelio Hinojosa for their efforts to broaden and diversify NASIG membership through translation of membership brochures into French and Spanish;
4) Conference Planning Committee: Leighann Ayers, Tom Champagne, Christine Starnison, Judy Wilhelme, Rita Echt, Steve Savage, Leah Black, David Fritsch, Shary Balius, Joe Badics, Mary Ann Sheble, Jean Loup and Barbara Heath;
5) Program Planning Committee: Karen Cargille, Christa Easton, Rita Broadway, Pamela Simpson, Mike Markwith, Adrian Alexander, Ruth Haas, Whit Alexander, Amira Aaron, and Marjorie Wilhite. Cindy Hepfer and October Ivins were also recognized for their many years of service as members of and advisors to the Program Planning Committee.

B. Geer recognized the 1996 Proceedings Editors Cecelia Leathem and Christine Christiansen and indexers Maggie Horn and Tom McFadden. She then acknowledged the Newsletter Editor-in-Chief Maggie Horn and the Editorial Board: Steve Savage, Carol MacAdam, John Harrison, and Vikki Medaglia, followed by the continuing committee chairs Cheryl Riley (Database & Directory), Marilyn Geller (Continuing Education), and Debbie Sibley (Awards & Recognition).

Old Business

There was no old business.

New Business

Nominations & Elections

Past-President Julie Gammon, on behalf of Nominations & Elections, introduced the new 1997/98 Board: Members-at-large Eleanor Cook (re-elected), Fran Wilkinson, and Jim Mouw; Treasurer Gerry Williams; Vice-President/President-Elect Steve Oberg. J. Gammon reported that their terms begin immediately following the conference. She stated that 40% of the membership voted in this election.

Special Award

B. Geer “honored” Hartmut Walravens, Berlin State Library, with the Pink Cadillac Good Sport Award for his outstanding participation in the Chenille Sisters concert on opening night.

1997 Proceedings Editors Announced

Carol Diedrichs introduced the 1997 Proceedings Editors Charlene Simser and Mike Somers from Kansas State University.

1998 Conference Preview

Susan Davis, President-Elect, reminded members about the Call for Papers for the 13th annual conference, June 18-21, 1998, at University of Colorado, Boulder. The theme is “Head in the Clouds, Feet on the Ground: Serials Vision and Common Sense.” She then introduced Pat Wallace and Wendy Baia, co-chairs of the 1998 Conference Planning Committee. P. Wallace reported that conference plans are well underway and invited everyone to Boulder. She provided an
An early weather report and said that the altitude is very similar to Albuquerque's. W. Baia, who moved from Ann Arbor to Boulder eleven years ago, encouraged members to pick up informational brochures in the Stockwell Lobby.

1998 Program Planning
S. Davis introduced the 1998 Program Planning Committee Chairs: Judy Luther, Mike Markwith (plenaries) and Marjorie Willhite (workshops). Committee members are: Whit Alexander, Rita Broadway, Ladd Brown, Meg Mering, Bob Persing, Josephine Anemaet, Sandy Gurshman, and Mary Page. J. Luther asked members to think of issues, workshops, case studies, and other proposals for the August 1 deadline.

Adjournment
The meeting adjourned at 9:19 a.m.

Respectfully submitted,
Connie Foster, Secretary

OTHER NASIG NEWS

Shaping a Brochure: A Report on the Publication of NASIG's "Shaping a Serials Specialist" / Connie Foster

During NASIG committee meetings at the Duke conference in June 1995, Linda Meiseles posed a question to members of the Continuing Education Committee: what value are we adding to the information profession as serials specialists that justifies our existence? She had recently read Alex Bloss's article "The Value-Added Acquisitions Librarian: Defining Our Role in a Time of Change" (LAPT, 19.3, 1995, 321-330) and wanted to articulate the specific value of serials librarians to the information community. She proposed that Continuing Education consider a brochure to highlight the contributions and competencies of serialists. Since this would be the first time a committee initiated a publication, co-chairs Marilyn Geller and Michele Crump asked for and received approval and encouragement from the Executive Board to develop the idea.

In the fall of 1995, Linda Meiseles drafted a 5-page narrative of responsibilities and qualities of a serials librarian, while the committee discussed the target audience. In January 1996, with the audience identified as library and information science educators, university administrators, and information specialists, Connie Foster condensed the narrative into a brochure-type format. The committee reviewed a mock-up between March and May 1996 and forwarded a revised copy to the NASIG Executive Board for review in June 1996 at the Albuquerque conference. At the fall Board meeting, the committee received approval for proceeding with the final copy and an initial printing of 2000 copies after January 1, 1997. At its mid-winter meeting, the Board revised the distribution to 3000 copies for inclusion in the April Newsletter, at the annual conference, with new member packets, and to library and information science programs. M. Crump developed the distribution plan and coordinated the printing process.

In May 1997, Maggie Rioux put the brochure on NASIG's Web site under "Other Resources." Through fax and e-mail (with a few telephone calls), the project underscores NASIG's volunteer spirit, collaborative efforts and cooperation. Check out the Web version at http://nasig.iils.unc.edu. We hope you find the print version useful too.

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60 Campus Avenue 
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Robarts Library  
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3459 McTavish Street  
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Have you seen the Call for Nominations in this issue?
Cynthia Porter
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135 N Bellefield Avenue, Room 602
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Internet: PORTER@LIS.PITT.EDU

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332 Palmetto Street
West Palm Beach, FL 33405
Internet: SPOSTI@ACC.FAU.EDU

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4103 Wallace Lane
Nashville, TN 37215
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Trina Richard
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Internet: CSS4@CORNELL.EDU

Priscilla Klob Shontz
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Phone: (210) 736-8160
Fax: (210) 736-8021
Internet: PSHONTZ@TRINITY.EDU
TITLE CHANGES

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

Congratulations and best wishes to all!

Dana Marie Belcher is the new Periodicals Librarian at East Central Oklahoma State University. She began her new job in April, 1997. Previously, Dana was the cataloging/circulation library technician at a USEPA research library. Dana writes, "I came into this new job in the midst of a major move into a brand new facility. All periodicals, in all formats, will be housed on one floor. I have been supervising the major part of the move, which has been quite interesting. In two weeks, we have only been in the library once (and that was only for 45 minutes). We have been really blessed by the weather and student workers more anxious than we to get into the new building. No, we did not hire professional movers, but our student assistants are doing a stand-up job. Getting this job meant I did not have to move anywhere. I worked in this library as a student getting my undergraduate degree. I came back and worked as a full time assistant. I then left for graduate school. My dreams came true when they rehired me once again as a librarian. I plan to live in this town while my son grows up. Therefore, I feel I can stop and breath for a few years." Her addresses are:
East Central Oklahoma State University
Ada, OK 74820
Phone: (405) 332-8000
Internet: DBELCHER@MAILCLERK.ECOK.EDU

Tamalane Blessey has been promoted to Serials Librarian, Head of Technical Services at Xavier University of Louisiana. She writes, "My promotion to Head of Technical Services of the Xavier University Library occurred in January 1997, and involves administrative duties supervising the Cataloging and Serials Departments of the library. This position will run concurrently with my duties as Serials Librarian, which involve all aspects of serials management and cataloging." Her addresses are:
Xavier University of Louisiana
Xavier University Library
7325 Palmetto Street
New Orleans, LA 70125
Phone: (504) 483-7308 ext. 6315
Fax: (504) 486-2385
Internet: TBLESSEY@XAVIER.XULA.EDU

From Molly Brennan we learn that, "Starting June 1, 1997, I became Serials Coordinator at Virginia Tech Libraries. The serials unit includes serials check-in, bindery and government documents. There are 13 people working in the unit. (Fourteen if you include me!) My previous position was Acquisitions and Serials Librarian at Radford University in Radford, Virginia, which is just 20 minutes away from Tech. I was lucky to find such a great job nearby because I didn't want to have to leave the New River Valley and the beautiful Appalachian Mountains. I am really enjoying my new job and am looking forward to some new challenges." Molly's new addresses are:
Virginia Tech University Libraries
P.O. Box 90001
Blacksburg, Virginia 24062-9001
Phone: (540) 231-9254
Fax: (540) 231-3694
Internet: BRENNA@VT.EDU

Peggi Clark has been promoted to Director of Publisher Relations at UMI. She was previously Manager of STM/International Publisher Relations. All of Peggi's addresses remain the same.
UMI
300 North Zeeb Road
Ann Arbor, MI 48106-1349
Phone: (800) 521-0600 ext. 3319
Fax: (313) 975-6462
Internet: PCLARK@UMI.COM
Patricia Denham, Head of Preservation and Archives at the University of Cincinnati Law Library is now Patricia K. Turpening. Her new e-mail address is: PAT.TURPENING@LAW.UC.EDU. All Pat's other addresses remain the same.

Christa Easton has a new position as Head of the Serials Group at Stanford University Libraries. She started at Stanford on August 18, 1997. Christa was previously the Serials Librarian at the University of Houston. Her new contact information is:
Stanford University Libraries
Myer Library
Stanford, CA 94305-6004
Phone: 650-723-7907
Internet: CEASTON@SULMAIL.STANFORD.EDU

Margaret E. Galloway, Serials Librarian, will retire effective August 31, 1997 after thirty years with the University of North Texas Libraries. For nine of those years, Margaret served as the Associate Director of Libraries including one year as the Interim Director, but the majority of her time has been in serials and automation. Margaret has over thirty-six years of library service within the State of Texas and has been an active member of the Texas Library Association, the American Studies Association of Texas, and other professional and scholarly organizations. She values her experiences with all of her many colleagues, but especially treasures those within NASIG. After she retires, Margaret can be contacted at:
Margaret E. Galloway
2537 Freedom Lane
Denton, TX 76203-1523

In September 1996, Jacqueline Gill was promoted to Assistant Professor and Chief of Acquisitions at City College Library in New York. She was previously Serials Librarian there. While it is a promotion, Jackie says that the major change in her job has been the addition of new responsibilities. Now, along with managing serials acquisitions, she also manages the acquisition of monographs and other library materials, the gifts and exchanges, and the book sales that help CUNY dispose of materials not needed in the collections. Jackie's addresses are:
City College Library
West 138 Street & Convent Avenue
New York, NY 10031
Phone: (212) 650-7143
Fax: (212) 650-7648
Internet: JACCC@CUNYVM.CUNY.EDU

Lise Hedin has left her job as cataloger at the Library of Michigan for a new one as Technology Coordinator at the Veterans Memorial Library in Mt. Pleasant, MI. She writes: "My job will be to bring library automation forward, set up a new server, establish new workstations, oversee the migration to a new system, initiate public access to the internet, bring up CD-ROM towers, manage a $100K technology grant, and participate in local consortia. These responsibilities are for the main library along with five small rural branches connected by a WAN. This is very different from newspaper cataloging. I am still very interested in serials issues and NASIG and will look forward to attending the conference in Boulder." Lise's new addresses are:
301 S. University
Mt. Pleasant, MI 48858
Phone: (517) 772-3488
Fax: (517) 772-3480
Internet: LHEDIN@SCNC.DS.K12.MI.US

Linda Helenek, Head of Technical Services at Hofstra Law Library is now Linda Russo. Her new e-mail address is LAWLPR@HOFSTRA.EDU. All Linda's other addresses remain the same.
Randall Hopkins accepted the position of EBSCO Account Services Manager shortly before receiving his M.L.S. from the University of Maryland. Randall was fortunate enough to have won a 1996 NASIG student grant and attended the NASIG conference in Albuquerque. There he met Phil Greene, who put him in touch with Sue Dyer, and the rest is history; it could not have worked out better! Randall enjoys serving the U.S. federal libraries from EBSCO Subscription Services-Federal Government Division outside Washington, DC. His addresses are:

EBSCO Federal Division
6800 Versar Center, Suite 131
Springfield, VA 22151
Phone: (301) 779-3301
Fax: (301) 779-3301
Internet: RHOPKIN@WAM.UMD.EDU
and: RHOPKINS@EBSCO.COM

Pamela Matthews is now Acquisitions/Technical Services Librarian at the University of Maryland Baltimore County's Albin O. Kuhn Library and Gallery. She was previously the Acquisitions/Serials Librarian at Missouri Western State College in St. Joseph. Pam's new addresses are:

100 Hilltop Circle
Baltimore, MD 21250
Phone: (410) 455-6754
Fax: (410) 455-1061
Internet: PAMATTHE@GL.UMBC.EDU

From Steven Murden we learn, "After 10 years in the same position, I left my job as Assistant Department Head in Acquisitions at Virginia Commonwealth University in mid-June, 1997. I am taking some much-needed time off to give my brain a bit of a rest and to re-evaluate my future job prospects. I will probably be back in the job market in a few months, but for now, I'm enjoying my time off. You will still find me posting occasionally to SERIALST or ACQNET, and I am continuing my NASIG commitments. I can be reached at:

501 N. Boulevard #5
Richmond, VA 23220-3332
Internet:

STEVEMURDEN@MINDSPRING.COM

Terrence O'Malley has a new job as Bibliographic Database Management Librarian at Case Western Reserve University in the Kelvin Smith Library. His previous position was as Serials Catalog Librarian/Coordinator of Cataloging at Cleveland State University Library. Terrence's new addresses are:

Kelvin Smith Library
Case Western Reserve University
11055 Euclid Avenue
Cleveland, OH 44106-7151
Phone: (216) 368-5310
Fax: (216) 368-3669

Liz Pope previously worked for Academic Press as Electronic Publishing Developer. She writes, "My new job as Vice President, Business Development with Community of Science, Inc. (COS) began June 1, 1997. In this new role, I oversee the strategic
development, planning, and marketing of COS information products. COS is an electronic publishing company that uses the World Wide Web (WWW) to gather and distribute information about scientific research and its funding. The Company develops and provides WWW products that are targeted to the information needs of professional scientists and are designed to enhance the productivity of researchers from the beginning stages of research (searching for collaborators and sources of funding) through the more advanced stages (reviewing the current literature and reading relevant full-text articles).” Liz can be reached at:

Community of Science
3769 Hatton Street
San Diego, CA 92111
Phone: (619) 277-0092
Fax: (619) 874-2926
Internet: EPOPE@IX.NETCOM.COM

Julie Su began her new job as Librarian at the Center for Nursing Scholarship, Sigma Theta Tau International, Inc. on August 18, 1997. Previously, Julie was Serials Cataloger at Indiana University - Purdue University at Indianaapolis, University Library for 9 years. Julie’s new addresses are:

Center for Nursing Scholarship
Sigma Theta Tau International, Inc.
500 West North Street
Indianapolis, IN 46202
Phone: (317) 634-8171
Internet: JSU@STTI.IUPUI.EDU

On July 14, Ariane Swets started her new job as a Project Manager at PICA, the Dutch Center for Library Automation in Leiden, the Netherlands. She was previously a Sales and Product Development Manager for Swets Subscription Service in Exton, PA. Ariane writes: “My new job is absolutely marvelous. My responsibilities are very exciting and my job description has already changed. First, it was Project Manager of WebDOC. WebDOC gives libraries access to a central catalogue of electronically available documents, called WebCAT. RLG (Research Libraries Group) participates in WebDOC, both as supplier and user. Now my title is Project Manager of all Enduser Services, which includes everything from negotiating access to Silverplatter databases to getting contracts with publishers. I am brushing up on my French and German, which needed it. I feel as if I won the lottery.”

Ariane’s new addresses are:

PICA
PO Box 876
2300 AW Leiden
the Netherlands
Phone: +31 (0)71 524 6500
Fax: +31 (0)71 522 3119
Internet: ARIANE.SWETS@PICA.NL
http://www.pica.nl

Virginia Taffurelli started working at CUNY Brooklyn College Library seventeen years ago, in a clerical position. She worked so hard, and liked her job so much that by the time she left she was Deputy Head of Serials. Virginia left to attend library school at the Pratt Institute in Brooklyn. She was a 1996 NASIG student grant recipient and got her MLS in December 1996. She began her first “professional” position in March 1997 as Cataloger/Serials Librarian at SUNY Health Science Center at Brooklyn (SUNY Downstate). In her new position Virginia is in charge of all aspects of serials, including serials control, cataloging, invoicing, renewals and bindery. Virginia’s new addresses are:

SUNY Health Science Center at Brooklyn
Medical Research Library
450 Clarkson Avenue
Brooklyn, NY 11203
Phone: (718) 270-7430
Internet: TAFFUREV@HSCBKLYN.EDU
Kay Teel was formerly Serials Cataloger at New York University's Bobst Library. She worked at NYU for six years after getting her MLS from Columbia University. On June 18, 1997, Kay became Head Cataloger at the Cleveland Museum of Art Library. She reports that she is enjoying the change of pace, and Cleveland has been enjoying a beautiful summer so far. Her new addresses are:

Ingalls Library
Cleveland Museum of Art
11150 East Boulevard
Cleveland, OH 44106-1797
Phone: (216) 421-7340 ext. 557
Fax: (216) 421-0921
Internet: TEEL@CMA-OH.ORG
http://www.clemusart.com

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Cheryl L. Conway
Correct to: CONWAY@COMP.UARK.EDU

David W. Free
Correct to: LIBDWF@PANTHER.GSU.EDU

Stephen P. Heckman
Correct to:
SHECK@BOUNDTOPLEASE.COM

Judith A. Johnston
Correct to:
JOHNSTO@MAIN.LIBRARY.UNT.EDU

Kit Kennedy
Correct to: KENNEDY@BLACKPER.COM

William Leazer
Correct to: BLEAZER@EBSCO.COM

Jean Lenville
Correct to: JLENVILL@RICHMOND.EDU

Nigel W. Long
Correct to: LONGL@FAXON.CA

Anne E. McKee
Correct to: MCKEE@BLACKPER.COM

Mary Ann Sheble
Correct to: SHEBLEMA@UDMERCY.EDU

DIRECTORY CORRECTIONS

There were two changes in the Board Liaison appointments that were made after the directory had been sent to the printer: Steve Oberg is now the Executive Board liaison for Continuing Education, and Jim Mouw is the liaison for Regional Councils & Membership.

Also, these two members were inadvertently omitted from the Directory. Please add them to your Directory:

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Blackwell's Information Services
47 Cliveden Court
Lawrenceville, NJ 08648
Phone: (800) 458-3706
Fax: (609) 232-5397
Internet: FEICK@BLACKPER.COM

LaVina Swanek
Administrative Assistant
Creighton University
Reinert/Alumni Library
2500 California Plaza
Omaha, NE 68178
Phone: (402) 280-2228
Fax: (402) 280-2435
Internet: SWANEK@CREIGHTON.EDU
SERIALS RELATED REPORTS

Society for Scholarly Publishing / Isabel Czech

This year's SSP Annual Conference was held in Washington DC from June 4-6. The theme of the conference was "The Evolution of Publishing: Strategies for Success".

The meeting was well attended with nearly 400 publishers, vendors, printers and librarians in attendance. The meeting dealt with the "practical" rather than the "theoretical" aspects of publishing, designed to focus on providing information on how to run a publishing operation more efficiently, with lots of company representatives sharing their thoughts with their colleagues. SSP is always a very "conversational" meeting, and this year was no exception.

The topics of this year's meetings were diverse, keeping in mind that same "practical" thread. The opening plenary session featured an author, an editor, and a bookstore owner, who provided an overview of the monumental changes taking place in publishing over the past decade. There were 3 other plenary sessions as well as 15 concurrent sessions, which dealt with technical issues as well as marketing strategies, licensing models for electronic content, and electronic journal launches. Of special interest was the session on the DOI, or Digital Object Identifier. The speaker at this session was Carol Risher of the Association of American Publishers, who explained this universal coding system which will enable publishers to embed unique identifiers in electronic content, both for rights management and for citations to books and journal articles. Trisha Davis of Ohio State University Libraries shared her perspectives on licensing primary and secondary material to libraries, while Thomas Finbolt of the University of Michigan School of Information discussed "Collaboratory Life: Observations on Scientific Work via the Internet." Ever wonder how publishers decide when to start new journals, and when to "twig" others? A session on "Case Studies: New Journal Launches" focused on these questions with three primary publishers offering their experiences.

Next year's SSP annual meeting will be in May in San Diego.

CONSER Operations Committee Meets in Conjunction with NASIG / Jean Hirons, CONSER Coordinator

The CONSER (Cooperative Online Serials) Program Operations Committee held its annual meeting at the University of Michigan May 27-28. This allowed most participants to stay on for the NASIG conference, and I think it is safe to say that both CONSER and NASIG benefitted from the connection. Normally the Committee meets at the Library of Congress during the first week in May. The University of Michigan is a CONSER member; its status as one of the leading players in the digital world made this a good opportunity for CONSER members to experience firsthand some of the new developments. The opportunity to attend NASIG, however, was probably even more valuable. This year's theme of cooperation and experimentation seemed very descriptive of CONSER, and a number of CONSER participants gave presentations during the conference.

Les Hawkins (LC) and Steve Shadle (University of Washington) presented a workshop "Cataloging Electronic Journals" that focused on a number of the problem areas arising from the new ways in which electronic journals are being formatted. Jean Hirons (LC) was the convener for a presentation "CONSER Goes Out on a Limb," which addressed CONSER's "Interim Guidelines for a Online Versions." The guidelines include a single-record option that has been widely applied since the announcement of the guidelines in August 1996. Joining Hirons on the program were Jim Holmes from the University of Texas at Austin, Tad Downing from the U.S. Government Printing Office, and Linda Terhaar and Tom Burnett from the University of Michigan. At the networking node on
serials cataloging, Crystal Graham (UC, San Diego) and Jean Hirons took the opportunity to share with NASIG colleagues the ideas expressed in their paper "Issues Related to Seriality," which will be presented at the International Conference on the Principles and Future Direction of AACR in October 1997. Margaret Mering (University of Nebraska-Lincoln) and Lise Hedin (Library of Michigan), both participants in the U.S. Newspaper Program, gave a workshop "Newspapers: Yesterday, Today, and Tomorrow" which focused on the new chapter on newspapers in the CONSER Cataloging Manual and the cataloging of electronic newspapers.

Several CONSER members who attended NASIG for the first time subsequently shared their thoughts with me. John Riemer (University of Georgia) commented on how well the NASIG sessions on electronic cataloging complemented the discussions held on that topic at the Operations meeting. He mentioned how valuable it was to have the time available to discuss "nuts and bolts" issues and to attend workshops on topics he knew little about and could learn a great deal from. In closing, John remarked that "I enjoyed the wall-to-wall serialist environment for a whole weekend. I've never attended a conference where suit and tie was not only optional -- it was slightly frowned on. A nice change of pace!"

In addition to attending cataloging workshops, David Van Hoy (MIT) also took the opportunity to attend sessions not devoted to cataloging and found them "thought-provoking and helpful." He also noted that the "issues sessions, plenary sessions, and workshops were of high caliber." David also commented that "the dorm food may have been the best college-issue food ever — on any campus!" (I agree that it was very good.)

Both John and David commented that they would not have been able to attend NASIG if CONSER had not met at the University of Michigan. Next year, and for the foreseeable future, CONSER Operations representatives will return to the Library of Congress for their annual meeting, which will be held in conjunction with the annual meeting of the BIBCO Operations Committee. (BIBCO is the monographic component of the Program for Cooperative Cataloging.)

I'm very glad that we took the opportunity while we had it and that so many CONSER members were able to attend NASIG.

Summary of the ALCTS SS Committee to Study Serials Cataloging 1997 Midwinter meeting minutes

At the Friday meeting, Committee members and guests discussed several topics. The discussion was aimed at identifying areas in the cataloging rules that require change. The Committee decided the following topics were worth developing:

1) There should be an option in the rules for creating an intellectual content record, regardless of physical manifestation.
2) The rules should present the best practice for cataloging the variety of electronic serials that exist.
3) The rules should reflect a paramount concern for user interaction with records, affording both ease and appropriateness of access to the materials cataloged.
4) The rules should treat serials as a typical subject of cataloging rather than an exception to the cataloging of monographs.
5) The rules should allow options for cataloging using latest or earliest entry for cases or collections that are best served by that practice.
6) There should be cataloging rules for the description of holdings information, just as there are rules for bibliographic description. There is a USMARC Holdings format, but no cataloging rules for holdings.

The Committee also agreed that an alternate would be appointed as a back up to the Liaison to CC:DA.

At the Monday meeting, the Committee heard a report from its CC:DA liaison, a report on the MARBI meetings, and a report on activities at the Library of Congress, CONSER, and
NSDP. Most of the meeting time was devoted to a presentation by Jean Hiron about the paper that she and Crystal Graham are writing for the Toronto Conference in the fall. Jean's presentation was followed by questions and discussions.

Complete minutes of these meetings are available from ALCTS.

1) Send a self-addressed, stamped envelope (Legal-size) to: ALA/ALCTS, 50 East Huron, Chicago, IL 60611. (Specify which meeting you wish to receive.)

2) Obtain the minutes electronically by the following method:
Send the below message to:
LISTSERV@UICVM.BITNET or
LISTSERV@UICVM.UIC.EDU
send serials report
(A "Subject:" line is not necessary; however, whatever you put there will not affect the request.) Just type the above message. No punctuation or other text should be in the message. Do not add your address; it is automatically identified when the request is received. If you have problems, request assistance from your local systems or computer center personnel or contact the ALCTS Office. Procedures for receiving file transfers may vary depending on your e-mail system.

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CALENDAR OF UPCOMING EVENTS

Carol MacAdam

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

September 18-19, 1997
ARL Office of Scholarly Communication Workshop:
"License Review And Negotiation, Building A Team-Based Institutional Process"
Boston, MA (hosted by the Boston Library Consortium)
http://arl.cni.org/scomm/licensing/lworkshop.html

September 24-26, 1997
Society for Scholarly Publishing Top Management Roundtable:
"Scholarly Publishing in a Borderless World, Navigating the Future"
Montreal, Quebec
contact SSP: (303) 422-3914

September 26-27, 1997
Washington, D.C.
"A Capital Idea: Electronic Serials from Acquisition to Access"
A regional institute sponsored by Serials Section, ALCTS

October 14-17, 1997
ARL Membership Meeting
[open only to ARL library directors]
Washington, D.C.

October 28, 1997
SSP Fall Seminar:
'Practical aspects of electronic publishing'
Speaker: Chris Biemesderfer, Ferber Associates
contact SSP: 303-422-3914

November 1-5, 1997
American Society for Information Science Annual Meeting
Washington, DC

November 6-8, 1997
17th Annual Charleston Conference on Issues in Book and Serial Acquisitions: "Great Expectations"
Charleston, SC

November 20-21, 1997
ARL Office of Scholarly Communication Workshop:
"License Review And Negotiation, Building A Team-Based Institutional Process"
Chicago, IL (hosted by the CIC)
http://arl.cni.org/scomm/licensing/lworkshop.html
January 9-15, 1998
American Library Association
Mid-winter meeting
New Orleans, LA

March 2-4, 1998
Computers in Libraries 1998
Hyatt Regency Crystal City
Washington, DC

March 13, 1998
Acquisitions Section of ALCTS
Teleconference
"Fundamentals of Acquisitions"
Contact: Ann L. O'Neill, Assistant Professor
College of Library & Information Science
University of South Carolina
Columbia, SC 29208
Internet: aoneill@sc.edu

March 30 - April 1, 1998
Annual conference
United Kingdom Serials Group
University of Exeter

May 14-15, 1998
Spring Meeting, Ohio Valley Group of Technical Services Librarians
Plaza Hotel and Convention Center
Bowling Green, KY
[See Call for Papers in this Newsletter issue.]

May 22-27, 1998
Medical Libraries Association Annual
Conference
Philadelphia, PA

June 6-11, 1998
Special Libraries Association Annual Meeting
Indianapolis, IN

June 18-21, 1998
13th NASIG Conference
University of Colorado, Boulder
Boulder, Colorado

June 25-July 2, 1998
American Library Association
Annual Conference
Washington, DC

July 11-16, 1998
American Association of Law Libraries
Annual Meeting
Anaheim, CA

CALL FOR PAPERS: Spring 1998 meeting of the Ohio Valley Group of Technical Services Librarians
COLOR US BOLD: The Spectrum of Library Technical Services

The Ohio Valley Group of Technical Services Librarians (OVGTS), serving Indiana, Kentucky, and Ohio, will hold its 1998 annual meeting at the Plaza Hotel and Convention Center, Bowling Green, Kentucky, on May 14-15. The OVGTSL Program Planning Committee invites proposals for presentations that explore the spectrum of library technical services. Presentations relating to academic, public, or special libraries from historical, theoretical or practical perspectives are welcome. Possible areas include:

- Acquisitions
- Cataloging
- Database maintenance
- Preservation
- Serials
- Collection management
- Changing relations with vendors and publishers
- Educating/retraining technical services staff
- New technologies, services, software, standards
- Instructional roles for technical services librarians
OVGTSL invites all interested persons to submit proposals and suggested topics/speakers. Please include the following:
Name, address, institution and title, e-mail address, and telephone number of the presenter(s)
Title of presentation
Abstract (not to exceed 200 words)
Format (e.g. oral presentation, panel discussion, poster session)
Equipment needs
Total time required (including time for questions)

Proposals should be submitted by October 1, 1998 to:
Rose Davis
Helm-Cravens Library
Western Kentucky University
1 Big Red Way
Bowling Green, Kentucky 42101-3576

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

November 1, 1997

NO LATE SUBMISSIONS WILL BE ACCEPTED

NASIG addresses:  2103 N. Decatur Rd., No. 214  Decatur, GA 30033
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Gopher:   NASIG.lis.unc.edu

Send all submissions/editorial comments to:
Maggie Hom  Head of Bibliographic Services  Cline Library  Northern Arizona University  Flagstaff, AZ 86011-6022  Phone: (520) 523-8779  Fax: (520) 523-3770  Internet: maggie.hom@nau.edu

Send all items for "Title Change," the Calendar, and "New Members" to:
Carol MacAdam  Swets Subscription Services  440 Creamery Way, Suite A  Exton, PA 19341  Phone: (800) 447-9387  Fax: (610) 524-5366  Internet: cmacadam@swets.nl

Send all inquiries concerning the NASIG organization and membership, and change of address information, to:
Connie Foster  Serials Supervisor  Western Kentucky University 1 Big Red Way  Bowling Green, KY 42101  Phone: (502) 745-6160  Fax: (502) 745-3958  Internet: rfosterc@wkyuvm.wku.edu

Send all claims for unreceived issues of the Newsletter to:
John Harrison, Acquisitions Librarian  Ladd Library  Bates College  Lewiston, ME 04240  Phone: (207) 786-6270  Fax: (207) 786-6055  Internet: jharrison@abacus.bates.edu

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Affiliation:
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Phone (if available):
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Deadline: October 15, 1997
Mail this form to N&E Chair or submit nominations via e-mail:
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