President’s Corner

Anna Creech

First of all, it was great to see so many familiar faces in Albuquerque this year, as well as so many new faces. I remember sometime around my 9th NASIG conference that I realized all the greetings and hugs and smiles on the first day felt a bit like a family reunion. I’m glad to see our “family” continue to grow and evolve over the years.

The work that the Albuquerque Conference Planning Committee put into the organization of this conference was evident to me, and that was also reflected in the glowing responses to the feedback survey. Additionally, this was an excellent program put together by the Program Planning Committee. I left the conference feeling inspired, and with a still growing to-do list prompted by the things I heard there.

Of course, the annual conference isn’t the only thing that has been keeping us busy this past year. NASIG is continuing to move forward with our expanded scope and mission. We joined NISO as a voting member, and we’re establishing a Standards Committee to facilitate engagement with NISO and other standards organizations (COUNTER is on the horizon). The Board had a very productive strategic planning day with October Ivins last winter, and we established a Strategic Plan Implementation Task Force to flesh out the ideas and create a plan to fulfill them. Drawing on the charge laid upon us by 2015 Vision speaker Anne Kenney, we created a task force to identify ways in which NASIG can raise awareness of and develop tools for reducing the risk of losing vulnerable digital scholarly content.

One of the things that came up in the strategic planning session was a concern that the membership is being
taxed too much with the volunteer work needed to keep the organization running smoothly. The Board is taking two approaches to address this over the next year or so. We’ve asked the Evaluations & Assessment Committee to develop a self-evaluation process for committees to assess whether they have enough support to do what they are tasked to do, as well as whether there are tasks that could be outsourced. The latter point is the other approach, and we are expanding some of the responsibilities for Non-Profit Help, an organization that has been assisting with some of the logistical tasks for the Conference Planning Committee and the Awards & Recognition Committee.

Ultimately, our goal is to free up member volunteer time for participation in more content-related work, such as the core competencies development and standards development/enhancements. These are the kinds of things that will have a positive impact on the profession.

These are exciting times to be involved with NASIG! Thank you for giving me the opportunity to provide leadership to this organization. I have some (literally) big shoes to fill, but thankfully, Carol Ann Borchert is still here in a past-president capacity to keep me from tripping in them.

Past NASIG Conference Proceedings Now Freely Available

Leigh Ann DePope, NASIG Publicist

NASIG is pleased to announce that the past volumes of the Conference Proceedings in Serials Librarian are now freely available on the Taylor & Francis website. Future issues of the Conference Proceedings will be available by open access after a six-month embargo.

NASIG worked closely with Taylor & Francis to bring about this change. We support open access publishing and are excited to be making this step.

Interview with Clint Chamberlain, the 2016 Merriman Award Winner

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

My current title is educational resource support officer, which makes me feel as if I should be wearing a uniform with epaulets. Title aside, I’m basically the head of Technical Services for the Dallas County Community College District. There are seven colleges within the district, each with its own library; some of the colleges have satellite campuses with their own libraries as well. We have a centralized tech services operation for all of them. I got my start on this path to technical services years ago prior to going to library school, but I didn’t really discover my love for serials until 1997 or so in the Boston University (BU) School of Theology Library, where I was a student worker while working on a graduate degree in archaeology.

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

It was while I was working with serials at the BU School of Theology Library that two friends and former coworkers, Beverley Geer and Bea Caraway, encouraged me to apply for one of the student travel grants. They were both involved in NASIG at the time; I think Beverley was currently the president or the past president. I applied and was lucky enough to be selected for one of the travel grants, which took me to the conference in San Diego, where I met some folks who are now friends for life. I continued to be involved through my time as a serials librarian and into roles in which I am not directly involved with managing serials or e-resources, but I manage folks who do work directly with serials and e-resources – I like to stay involved with
NASIG so that I can remain current on issues of concern to the staff I manage.

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

In a nutshell, I really wanted to go to UKSG again. I’d been fortunate enough to have presented there once, ten years ago, with Jill Emery and Dana Walker. It was an excellent conference, and I wanted to experience it again.

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

I was thrilled. Then I immediately went into a panic because I realized that my passport had recently expired and I had only a few weeks in which to get it renewed. Fortunately, passport renewal is a lot faster these days than it used to be.

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

I felt very well cared-for as an award winner. On the day the folks with UKSG were told that I had been selected as the recipient of the award, they contacted me and made sure I had everything I needed to make my hotel reservations and begin planning for the conference. Then, when I got there, the hospitality was wonderful. Everyone I met and spoke with was so kind and welcoming. The members of the Education Subcommittee invited me to dinner the night before the conference started, but I wasn’t able to attend due to having already made dinner plans with a friend; even so, it was nice to know that they were looking out for a newcomer like me. That set the tone for the rest of the conference.

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

I’m not sure. I do know that after I attended UKSG ten years ago, it opened my eyes to the different ways in which our colleagues in other countries work together to solve problems, and it made me aware of some of the great things that have come out of the UK in terms of dealing with scholarly communication issues. Although the community college setting I’m in doesn’t lend itself to much work with those same issues, it’s inspiring to see what’s going on in the wider world of scholarly communication in all its forms.

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

One thing that stood out at UKSG were the sessions focused on research (e.g., on user behavior and user experience; use of hard and soft metrics in library decision-making) and what might be called, for lack of a better term, theory (the psychogeography of libraries). Whereas, in my experience, a lot of NASIG sessions are more about day-to-day practical or hands-on stuff that attendees can replicate at their home libraries. It also seemed like there may have been more sessions at UKSG focused on scholarly communication issues, which I know NASIG is actively encouraging as well.

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

It’s hard to pick a favorite because there were so many good sessions. One that particularly stands out in my memory was the first plenary session, which was presented by Ann Rossiter, the executive director of SCONUL. It was entitled “Managing relationships between libraries and publishers for greater impact.” Her presentation identified key areas in which effective collaboration between librarians and publishers could effectively change the landscape of scholarly communication for the better, and I left there with a lot of food for thought.

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

The two organizations are obviously similar in many ways, but one thing I noticed and liked a lot about UKSG is the presence and active participation of so many vendors and publishers.
For those who might be interested in going to UKSG and perhaps applying for the Merriman award, what advice would you give them?

DO IT. Seriously. The application process is simple and straightforward. If you’re not selected, all you’ve lost is a bit of your time that was spent completing the application form, but if you are selected, you’ll have a fantastic experience.

Upcoming Conference News

CPC Update: What Says “Indianapolis” to You?
Danielle Williams and Sue Wiegand, CPC Co-Chairs

The Conference Planning Committee (CPC) is excited about the program for the upcoming conference in June 2017 in Indianapolis, Indiana. Sue and I took a trip to the hotel in August to scout out restaurants, social activities, and recreational possibilities. We’ve got our eyes on several locations for the opening reception already and promise to make it as exciting and inviting as possible. Suggestions welcome! (See http://www.visitindy.com/indianapolis-bucket-listers for suggestions to start thinking about all the exhilarating possibilities!)

Indianapolis is known for racing, of course, but here’s the thing: it’s also a major crossroads, plus there are great biking trails and nature walks, fantastic food, fascinating museums, activities galore, parks, theatre, malls, arts, jazz, Monument Circle, gamers’ conventions, amateur and professional sports, landmark architecture, and a vibrant coffee scene! So whether you’re an “urban adventurer,” a “history buff,” or “into the wild” — or maybe you encompass all that and more — plan to come to NASIG in Indy to learn and share serials information while enjoying some lively amenities.

The committee is eager to get started on the 32nd annual conference next June. We’ll report back with developments in the coming months.

PPC Update: Call for Proposals
September 30th – November 15th
Steve Kelley, PPC Chair
Violeta Ilik, PPC Vice-Chair

The Program Planning Committee will hold one “Call for Proposals” from September 30–November 15, 2016 for the 2017 NASIG Annual Conference. More information regarding the proposal submission process will be available in the coming weeks.

PPC has identified three potential vision speakers who have been approved by the Executive Board, and we are now in the process of finalizing arrangements with these speakers. We hope to have news on this front in our next update. PPC is also discussing practical, hands-on workshops for the preconference sessions. We are looking forward to carrying on the tradition of bringing thought-provoking vision speakers, exciting workshops, and innovative sessions to the NASIG Annual Conference. Please contact the PPC Chairs at prog-plan@nasig.org if you have any questions or recommendations.
Post Conference Wrap-Up

31st Annual Conference (2016) Business Meeting Minutes

The business meeting took place on Saturday, June 11, 2016 at 4:30 pm.

BUSINESS MEETING AGENDA (4:30-5:30 pm)

Call to Order

The meeting was called to order at 4:31 pm. Christie Degener served as parliamentarian.

Highlights from the Past Year, Presented by Carol Ann Borchert

Borchert listed out many of the accomplishments from the 2015-2016 year.

- The logo and tagline were changed to *Transforming the Information Community*.
- A new logo was created.
- New banners and t-shirts were printed with the new tagline and logo.
- A pilot project to offer free student memberships was trialed in 2016. Over 400 students registered as NASIG members. The Board voted to continue this program in perpetuity.
- Vision speakers are now offered a two year complimentary NASIG membership.
- The Board participated in a strategic planning session in January, and a Strategic Planning Implementation Task Force has been created to develop a new strategic plan.
- Starting with the 2016 conference, vision sessions will now be streamed. There are more plans in place to expand conference streaming in the future.
- A new petition process and suggestion form are on the NASIG website.
- NASIG is now listed in Wikipedia thanks to CEC and Shana McDanold. Many thanks to Susan Davis and Kevin Balster for expanding the entry’s content. NASIG members can add extra content to the entry.
- The new search box on the NASIG website now searches both the site and the *NASIG Newsletter*.
- NASIG joined NISO as an organizational member. A new Standards Committee will be formed to vote on the NISO standards.
- NASIG is in the process of becoming a member of Project COUNTER.
- The contract for the *Conference Proceedings* was renewed with Taylor & Francis. The *Conference Proceedings* will now become open access six months after it is published, authors can put a version into their institutional repository, and the older proceedings will be made open access.
- NASIG is an advisor for Library Publishing Coalition on an IMLS grant proposal, “Developing a Curriculum to Advance Library Publishing.” NASIG has written a letter of commitment for participation in the grant.
- A&R: There are two new awards: First-Timers Award and the Capstone Award. All award descriptions have been broadened in scope to include e-resources and scholarly communications, along with serials.
- The bylaws revisions passed.
- CPC held a Q&A webinar for first-timers.
- D&D completed a big database cleanup of expired records.
- Site Selection has now posted criteria for selecting a site on the NASIG website.
- There are several task forces in progress: The Archives Task Force, the Financial Planning Task Force, and the Scholarly Communications Core Competencies Task Force. There will be two new task forces and a new committee formed over the next year: Digital Preservation Task Force, Strategic Planning Implementation Task Force, and the Standards Committee.
Treasurer’s Report, Presented by Beverly Geckle

As of May 2016, there are 403 student members, 589 regular members, and 17 organizational members. Conference sponsorships brought in over $37,000. Webinar profits from 2015/2016 are $5,950. The bank account savings is $108,299, and there is $133,792 in the checking account. NASIG has approximately $80,000 of operating expenses.

Overall, NASIG is in good financial shape.

Introduction to the 2016-2017 Board, Presented Maria Hatfield and Patrick Carr (Nominations & Elections Committee Co-Chairs)

Incoming Vice President/President-Elect Steve Oberg was announced in addition to the four incoming Members-at-Large: Betsy Appleton, Chris Bulock, Angela Dresselhaus, and Adolfo Tarango.

Recognition of Outgoing Board Members and Committee Chairs, Presented by Megan Kilb and Mary Bailey (Awards & Recognition Committee Co-Chairs)

- Board members: Eugenia Beh (Member-at-Large), Maria Collins (Member-at-Large), Beverly Geckle (Treasurer), Steve Kelley (Past President), and Wendy Robertson (Member-at-Large)
- Bylaws: Tessa Minchew
- Communications & Marketing: Julia Proctor
- Conference Planning Committee: Betsy Appleton, Mary Ann Jones
- Conference Proceedings Editor: Angela Dresselhaus, Angie Ohler
- Continuing Education: Esta Tovstiadi
- Database & Directory: Christine Radcliff
- Evaluation & Assessment: Derek Marshall
- Membership Development: Trina Holloway
- Mentoring: Simona Tabacaru
- Nominations & Elections: Maria Hatfield
- Program Planning: Danielle Williams
- Registrar: Lisa Martincik
- Student Outreach: Shannon Regan

Strategic Planning Report and Discussion, Presented by Carol Ann Borchert

In January, the Board attended a strategic planning session facilitated by October Ivins. The current strategic plan expired in 2008, and the Board felt that an updated strategic plan was needed due to the change in the vision and mission statement. A number of ideas were generated during the session including:

- Becoming a member of NISO.
- A one-time database cleanup.
- Increasing our marketing plan with assistance from NonProfit Help and developing an elevator pitch.
- Streaming the conference. The vision sessions will be streamed for the 2016 conference. However, the Board would like to expand streaming to include more conference sessions.
- Rotating the conference sites. By rotating between 3-5 conference sites, CPC will be able to better plan for the conference and NASIG will be able to develop better relationships with hotels if the conference regularly returns to a site.
- Creating a Fundraising Coordinator position. Currently, the Past-President is tasked with coordinating sponsorships. A Fundraising Coordinator would be beneficial because that individual would be chosen for his/her fundraising expertise, as well as providing long-term stability as a vendor contact.
- Creating more content. NASIG is known for making an impact on the profession by creating core competencies. This sets NASIG apart from similar conferences or organizations.
- Increasing student involvement. SOC recently surveyed the new student members to better understand what they hope to gain by becoming members.
- Developing an on-going mentor program. Many students requested an on-going mentor program. The new mentor program will first be available to students, and will later be expanded for all members.
• Enhancing benefits for commercial members. It is important to make sure that the commercial members also receive benefits from their NASIG membership.

• Performing a committee audit. A large number of members currently serve on NASIG committees. A committee audit will be done to make sure that each committee has the appropriate number of members, which will hopefully prevent member burnout.

• Renewing our contract with NonProfit Help. Committees can develop delegation lists for work that could be outsourced to NonProfit Help.

Business meeting attendees discussed the ideas that came out of the strategic planning session. One suggestion included moving the conference proceedings toward full open access. NASIG currently relies upon the Taylor & Francis staff to maintain the conference proceedings, but it is possible that NASIG might have the staff to handle this in the future.

The main discussion revolved around the idea of 3-5 set conference locations, with the possibility of having a wild-card site. Benefits to returning to a conference location include working with a trained hotel staff and the ability to work from an existing location manual. If a conference site no longer meets NASIG members’ expectations, an alternate site will be added to the rotation.

Disadvantages of rotating sites includes the same people would be on CPC every few years, some members like the variety of conference locations, and members would get tired of attending the same opening session venues.

There was also the discussion of including Canada in the rotation. There would be specific challenges going to Canada because some U.S. institutions will not permit international travel, and attendees will have to have a passport.

The current plan is for the Board to introduce the conference rotation idea to see if this is something that should be pursued. The Board will present a formal plan with more specific cost-savings information to the NASIG membership at the 2017 conference. NASIG members are encouraged to fill out the new suggestion box on the website if they wish to convey information to the Board on this matter between conferences.

Discussion of Old Business, Presented by Christie Degener

There was no old business presented.

Call for New Business, Presented by Christie Degener

A suggestion was made to reconsider the dates for the conference. However, any date selected would conflict with other conferences, which is why the NASIG conference continues to be held at approximately the same time each year.

Susan Davis made a motion to adjourn. She was seconded by Denise Fergus, and the meeting was adjourned at 5:23 pm.

Minutes submitted by:

Kelli Getz
Secretary, NASIG Executive Board

2016 Conference Evaluation Report
NASIG 31st Annual Conference:
Embracing New Horizons
June 9-12, 2016

Submitted by

2016 Evaluation and Assessment Committee:
Derek Marshall (chair), Melody Dale (vice-chair), Clint Chamberlain, Deberah England, Michael Fernandez, Kathryn Johns-Masten, Trina Nolen

The 31st annual NASIG conference was held in Albuquerque, NM. The conference offered six pre-
conference workshops, three vision sessions, thirty concurrent sessions, one “great ideas” showcase, one snapshot session and a vendor expo. Other events included an opening reception, first-timers’ reception, and informal discussion groups.

115 surveys were submitted from 327 conference attendees. Survey respondents could enter a name and email address for a chance to win a $50 Amazon gift card. Laura Secord from DeWitt Wallace Library, Macalester College, was the winner.

Below is a summary of the survey results.

Conference Rating

Respondents were asked to give ratings on a Likert scale of 1 to 5, with 5 being the highest. The overall rating of the 2016 conference was 4.48. This was the highest rated conference over the previous four years.

Facilities and Local Arrangements

The 2016 rating was 4.35, a slight increase from the 2015 location of Washington D.C., which rated a 4.3.

Forty comments were entered on the survey about local arrangements and facilities mentioning a variety of issues. Meals and snacks appeared to be a large factor with several attendees, noting that the snacks were impressive and would constitute an entire meal. Several comments stated that more social dining options would have been appreciated. While the conference hotel was well-received, there were several comments on the overflow hotels not meeting standards. Several respondents commented that the AC was too cold in the meeting spaces. There were also several complaints about the Wi-Fi Internet connectivity not working correctly.
Eighty-one percent of survey respondents brought a laptop or a tablet to the conference. Fifty-three percent of respondents rated a high importance on wireless access availability in meeting rooms.

**Website, Blog and Schedule**

The majority of survey respondents rated the layout and explanation of programs as 4 or higher on the Likert scale with 46.94% assigning a rating of 5.

The conference website received a weighted average of 4.14. The conference blog was rated less highly at 3.88. Many of the commenters noted they did not take advantage of the conference blog or knew of its existence.

**Pre-Conference Workshops**

The six pre-conference workshops received a weighted average of 3.80 to 4.67. Comments were overwhelmingly positive, while only a small number of respondents mentioned that more time was needed to cover all that was necessary for particular topics.

**Vision Sessions**

Three vision sessions were a part of the 2016 conference. The average overall ratings for the three sessions ranged from 4.18 to 4.26. T. Scott Plutchak’s presentation was timely on Institutional Repositories with several respondents commenting on the excellence of his presentation. Many respondents commented on the timeliness of Heather Joseph’s presentation on Open Access and felt it complemented T. Scott Plutchak’s presentation. James J. O’Donnell’s “How Many Libraries Do We Need?” prompted many comments on the thought-provoking nature of his presentation.

**Other Sessions**

NASIG offered 30 concurrent sessions during the 31st annual conference. Twenty of those (67%) received an overall rating of 4.0 or higher. The number of sessions offered was lower than last year’s conference in Fort Worth. Most comments were positive, or offered specific, constructive criticism of an individual session. Feedback will be shared with presenters upon request.
2016 marked the fourth year of the great ideas showcase, formerly called poster sessions. There were seven participants in 2016. The overall rating for the great ideas showcase was 3.88. The showcase sessions did not generate many evaluation comments. However, among the comments were suggestions to include the topics in the evaluation survey. The Evaluation & Assessment Committee has noted this and will be sure to include this information in future surveys.

The 31st conference was the third year to offer snapshot sessions, “designed for 5-7 minute talks in which projects, workflows, or ideas are presented.” There were five sessions, with weighted averages from 3.32 to 3.93.

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

Events

The First Timers/Mentoring Reception received a rating of 4.07. An overwhelming 94.83% would like to see this event continue. Comments submitted about the event were positive, praising the networking opportunities; however, several comments noted that the space was too small for such an event.

The Business Meeting received a rating of 3.87. Participants noted that the meeting appeared to be disorganized, while others noted that it was informative to understand the inner workings of the organization.

As in previous surveys, academic library employees continue to represent the largest group of respondents at 79%. This is a marginally higher percentage than was held by academic libraries for the 2014 conference at 72%.

Respondents were asked to “describe your work” using as many of the 24 given choices as necessary (including “other”). 2016 marks the third year that “electronic resources librarian” garnered the highest number of responses (53). Acquisitions Librarian (42), Serials Librarian (40), Catalog/Metadata Librarian (28), and Technical Services Manager (28) round out the top five responses.

1 To ease the reading of the demographic chart, several categories offered on the survey were condensed:
- Academic libraries contains: College Library, Community College Library, University Library
- Vendors and Publishers contains: Automated Systems Vendor, Back Issues Dealer, Binder, Book Vendor, Database Provider, Publisher, Subscription Vendor or Agency
- Specialized Libraries contains: Law Library, Medical Library, Special or Corporate Library
- Government Libraries contains: Government, National, or State Library
- Others contains: Public Library, Student, Other
- Several other categories were available, but not selected by a survey respondent.
When asked about the number of years of serials related experience, “More than 20 years” received the majority at 40 responses.

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Thirty-one percent of respondents noted they have attended one to five past conferences.

Report on the 2016 NASIG Award Winners

At the 2016 NASIG annual conference the Awards and Recognitions Committee presented the following awards: the John Riddick Student Grant, the Fritz Schwartz Serials Education Scholarship, the NASIG grant for Mexican students, the Paraprofessional Specialist Award, the Rose Robischon Scholarship, the Birdie MacLennan Award, the First-Timer Award, the John Merriman Joint NASIG/UKSG Award and the Horizon Award. Each award included a financial component offsetting award winners’ expenses to the conference. At the close of the conference each award winner was asked to comment on their experience. Questions were asked in the form of a survey, and a compilation of their responses is included below.

Why do you feel it is worthwhile for newcomers to the field of serials to attend a NASIG conference?

- As a newcomer to both the field of professional librarianship and serials management, attending the NASIG conference provided me with an invaluable networking opportunity. I am the only librarian working in serials at my institution and having an organization devoted solely to my area helps me stay on top of current trends in the field. The sessions were fantastic as well as the social events. I feel like I’ve made some great professional connections that will stick with me as I move forward in my career that I would not have met without attending the NASIG conference.
- Serials world (Electronic and print) is complicated. There are several presentations at this conference based on practical experience, so one can learn a lot.
- The NASIG conference program covered a variety of topics relating to not only serials but also important issues like open access, library system migrations, online resources, and vendor relations. While most topics focus on can focus on serials, this variety is a good start for different interests among the serials field.
- The attendance at this type of conference allows you to know another panorama, different contexts, and for other job prospects and skill. You see cases of real situations and problems which a librarian faces every day and the solutions they find. Also attendance allows you to meet people working in different countries, states, and institutions, and they have other ways to manage and view your world. You find new trends of work, new ways of development activities, and meet new sources of
information. Above all, attendance allows the librarian stay at the forefront of changes.

- It’s a great way to meet others in similar roles as well as leaders and reps from vendors.
- NASIG’s conferences offering a great mix of big picture presentations that help situate one’s work within the wider landscape as well as practical, view-from-the-trenches kinds of workshops with information that one can take back to the workplace and implement. NASIG attendees are generally warm and welcoming to newcomers, enabling those new to the organization to feel like they have found their place.
- My impression from attending this year’s conference is that NASIG conferences are one of the most ideal conferences for newcomers, especially library school students. As a relatively small conference, activities are more or less spatially contained, which means it’s not an entirely overwhelming experience. For every first-time attendee, it felt like there were 2 long-time attendees who were enthusiastic to strike up a conversation with you based solely on the fact that you were a first timer—which creates an incredibly welcoming environment and a perfect icebreaker for any setting. My work in serials stems from the fact that I wanted work experience before attending library school, and serials-related positions are some of the most accessible positions to someone without an MLIS (or other Masters degrees). And as many serialists can testify, working with serials is hardly just processing magazines or standing orders. In my position, I get experience with all kinds of work--electronic resources, cataloging, scholarly communications--and attending this year’s NASIG conference allows me to keep up on issues across the board. As a new professional and grad student, this conference also served as a great introduction into librarianship as a whole. It can be hard to find professional development activities that speak directly to the work that I’m doing in such an inclusive way as NASIG does. And of course, communication never stops at the conference’s end--if you miss a business card, there’s always SERIALST.
- The conference was great for a few reasons. I attended sessions on issues that were new to me and that I hadn’t ever thought of before. I also got to meet a lot of people and even spend time with people from my institution that I don’t see on a regular basis. I also found the whole conference very energizing, the atmosphere was so positive and encouraging that I came back to work very eager to share my experience and to tackle new problems.
- NASIG provides a great opportunity for newcomers to develop their professional network and to know the trendy topics in the field.

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

- Although I’ve been working in libraries since a teenager I just completed my MLIS May 2015 and started my first professional position in January 2016. Working in academic libraries is a change from public libraries for me and I haven’t had many opportunities to attend national conferences in the past. Being able to attend the NASIG conference as an award winner provided me with a huge confidence boost and allowed me to experience what it’s like to network in a national organization. I feel much more confident in my position now with the experience I’ve gained at the conference.
- I networked with my colleagues and attended sessions of my interest.
- The conference had many social opportunities that allowed me to meet librarians from cities and schools of different sizes. Learning about how organizations differ made me appreciate how our library functions and gave me ideas on how we, as an organization, can be more efficient and do things differently.
- For me as a student to attend this conference was very interesting since I met people with different perspectives on the profession, who had experience in the management of serials publications in the
real world, and not just theory. Knowing the experiences of other librarians in their workplace allowed me to learn about the skills that I need to acquire. This conference also helped me see the different trends in serials and the work that exists around serials. I won this scholarship to support my professional formation, to reinforce my knowledge, to learn from others, and this conference allowed me to learn more about repositories, cataloging, metadata and e-books.

- I was able to discuss my research with others interested in OA topics.
- This is probably my 15th NASIG conference, so it was as always a good chance to catch up with old friends and colleagues and learn about what’s new in the world of serials. Being able to attend the UKSG conference allowed me to make new connections in the UK, while also providing me with a wider view of the scholarly communication landscape, particularly the different initiatives carried out in the UK.
- I met a lot of new people in the field. For a seasoned professional, libraryland may be small, but for a new professional, it feels impossibly large. Through conversations before sessions, during breaks and over meals, I received advice about grad school, career guidance, solving specific difficulties at work, and guidance on tackling more general issues at my job. As I remarked many times since the start of the conference— it was refreshing and amazing to learn so much that was directly relevant to the work I was doing, and to be able to see how much I could directly apply to my work. Trust me when I say I took a lot of notes.
- I made great connections and learned a lot about how other libraries handle issues in serials management. It also helped put me on the radar at my own institution since it became a talking point for me and provided an opportunity to talk with coworkers that I don’t usually get to see on a daily basis.
- I came to the conference with two clear goals: presenting on our approach of managing e-books and showing our local development of improving CORAL workflow at the CORAL user’s group meeting. It was immensely encouraging to see others show strong interests in our work and to see how our work would benefit the community. After talking to other librarians, I realized we were not the only one facing the challenge and issues in the e-book landscape. I’m looking forward to some potential collaboration with others.

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

- When I started my search for a professional librarian position I went in with an open mind. My background is quite varied and I do have experience in serials working at the Wisconsin Historical Society managing their serials collection. My current position at an academic library managing the print and electronic serials collections is great and constantly evolving. Attending this conference showed me that this field is thriving and although print serials are declining, electronic resources are one of emerging fields in librarianship. I think this will be an area that will keep me happy for many years to come.
- No, it did not. I am quite well established in my career and future plans.
- I am finishing up with library school and working in the e-resources, serials, and acquisitions field though many of the classes don’t focus on this area. Attending the conference definitely confirmed my interest in this area and made me feel at ease with fellow attendees.
- Before the conference I understood some aspects of serials, but the conference opened up my view of seeing and working with serials.
- Not really, as a mid-career person.
• No.

• I was and still am focused on scholarly communications. I was brought to this work through working with serials. I wasn’t expecting NASIG to be so entirely relevant and practical in relation to my current work and what I want to do as a career. Attending this conference validated and informed my future career plans all around—from the vision speakers to conversing with attendees who currently hold positions that are more or less dream jobs for me.

• Attending the conference definitely solidified my desire to be in Technical Services, I’ve always been interested in it but the sessions at the conference affirmed that this is definitely the area I want to be working in.

• As a career changer from a different field, I’m a new to academic librarianship. But I can tell this is a profession with constant change and it requires us to be able to embrace the changes. I believe it’s people who drive and make the change, so networking and collaboration will help us advance in this profession. The conference provides a platform to meet people and to get involved with committee work, which will in no doubt further my career.

What can NASIG and/or the Awards & Recognition Committee do to improve the NASIG Horizon Award program?

• My experience was really positive and I didn’t think the application process was too cumbersome. I would say making it easier to book flights and providing award winners with their own hotel rooms would be a good idea.

• For NASIG: This year most of the programs related to e-resources management were scheduled for Sunday morning at the same time. I was interested in all of them but could attend only one due to the time conflict. I think you could do better with program planning and schedule e-resources management related sessions throughout the conference and not at one particular time.

At this time, I am unable to recall if there were any e-resources management related programs on the previous two days of the conference. I understand that NASIG is mainly concerned with serials management and not e-resources management but scheduling all the e-resources related session towards the last leg of the conference is definitely not a good idea. Low attendance and schedule conflict is quite discouraging for the presenters and attendees. Scheduling the conference sessions is a hard job so this is just my humble suggestion and not a criticism by any means.

For Award Committee: I personally think it is helpful to know how many applicant one was competing against in a specific award category. It kind of builds confidence. So, If NASIG could just add a sentence in the award letter stating “We received ___ number of applications and you are the lucky winner” or something like that, it would be helpful. Or, you could announce at the inaugural session about how many people applied for the awards in various categories.

Another suggestion is that NASIG members should be given a chance to serve on one of the NASIG committee of their liking or they could be nominated to the committee of their choice by the NASIG award management committee. I think, in the long run, a possibility of getting professionally involved in a committee of your choice is more rewarding than the money for attending the conference. This aspect also brings in commitment from the award winners and a gives them a chance to engage in continuous learning and fulfill their professional or scholarship responsibilities.

Also, if you gave a chance to the award winners to speak for just about 1 minute while accepting the award, it would help them to connect with the audience and express their gratitude in front of a larger audience.

• No suggestions for improvement.
• The reimbursement model can be a little problematic.
• One thing that would be helpful for the Merriman Award is if the award winner could be selected and notified earlier in the year. I was notified on March 1 and had little more than a month in which to make travel plans for myself and my partner to attend UKSG, which might be fine for domestic travel but is a little tight for international travel. It would also allow the award winner a little more time in which to set aside money for the inevitable side trips and sight-seeing they might want to do before or after the UKSG conference.
• I can’t think of anything that could possibly be improved!
• I can’t really think of anything; I really appreciate that there are paraprofessional awards.
• I think the Committee did a fabulous job for the Award program. And I greatly appreciate they were able to accommodate everything I needed for attending the conference.

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

• Unlike other conferences I never found myself sitting in a corner alone at NASIG. I did like the idea of the Dine Arounds but it might have been nice to group people by interest. It would also have been nice to have arrived the day before the conference started because with flight delays I almost didn’t make it to awards ceremony on time.
• There should be one session, where everyone comes together and discuss what they do and how NASIG could help them. We did have a breakfast session but very few people were there. It should be mandatory to attend.
• I felt that NASIG and the Awards & Recognition Committee were so welcoming during the time before the conference in planning for travel and accommodations and especially during the conference. I don’t think there was anything that could have made me feel more at ease or improve my experience.
• The winners can also present a lecture.
• Nothing, really. It was a blast.
• Nothing that I can think of
• You all did a fantastic job, and I’m greatly appreciative of all the work you put into the program!
• I had a great conference experience and appreciated how many award-winner events there were. The environment at the conference was also incredibly welcoming and supportive, so I can’t think of anything I’d improve.
• I had a wonderful experience at the conference and will definitely come back next year.

Do you have any other suggestions or comments?

• I had a wonderful experience and I can’t say enough how grateful I am for the opportunity to attend as an award winner. I feel this gave me a boost professionally and a boost in confidence in my new position. Everyone in the organization is welcoming and kind and I made connections that I can ask questions of later. I hope to be able to attend next year too!
• You guys are awesome and thank you for providing such opportunities to librarians.
• No other suggestions or comments.
• That all the presentations that were given in the conference was recorded for that later were shared in his YouTube channel
• Nope
• Nope!
• No other suggestions.

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

• Website.
• I am a NASIG member and a previous award winner so I know about the awards through the emails and other announcements.
• Being a student member of NASIG taking advantage of the free student membership offered, I am on the NASIG listserv as well as SERIALST. My
supervisor also forwarded me the award information encouraging me to apply.

- By means of the Asociación Mexicana de Bibliotecarios and by the teacher from Development collections of Escuela Nacional de Biblioteconomía y Archivonomía
- I think I first learned about NASIG’s awards way back in 1998, when a friend who was a member at the time told me about them and encouraged me to apply for the Fritz Schwartz scholarship. I applied for it (didn’t get it) as well as for a student grant, which I did get and which enabled me to attend the conference in San Diego.
- Through working on CMC
- Through research for library grad school scholarships. I can’t remember what exactly led me to apply for this one—maybe between ALA’s website and an email on a SERIALST?
- SERIALST listserv and from my supervisor.
- NASIG website

Where should NASIG be promoting awards?

- Library schools for the awards for students and listservs for professionals. An increased social media presence might be a nice idea too.
- I think you are doing great job of promoting your awards.
- If not already, NASIG should use university LIS organizations to promote the awards. I’ve seen postings on forums in the course management systems for scholarships and job postings. This could be used to target applications for the student awards.
- Library faculty and promote more on the YouTube Channel
- I think the current promotion strategies are pretty good.
- Aside from the places where you’re already promoting them, I am not sure.
- Multiple listservs, grad school program coordinators, Facebook groups, the twitterverse
- Outside of listservs and maybe publisher websites (?) I’m not sure. I think that it’s just a matter of people drowning in email and it can be hard to get through all of that. Maybe it’s a matter more of changing the subject line of the emails to make sure they get noticed.
- Listservs, website, and social media.

**Interview with Christopher Bulock, the 2016 Birdie MacLennan Award Winner**

*Please start by describing your current position and how you came to be involved with information management (i.e. serials, e-resources, collection development, etc.).*

I’m currently the Collection Coordinator for Electronic Resource Management at California State University Northridge. I work on trial management, licensing, access, and evaluation for electronic resources. I’m lucky to have a lot of colleagues who also work with e-resources, so I don’t handle metadata, acquisitions, or most activation tasks. We’re currently migrating to Alma, so it seems like a lot of my work right now is trying to configure the ERM parts of that new system.

I first got involved with e-resources as an undergrad, working as a reference assistant. During down time, I would download usage reports from vendors and the proxy server, also working with the library’s homegrown ERMS. That was almost exactly ten years ago.

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

I was a very new professional and had almost no money for travel. I was in the St. Louis area at the time, and I could get just enough support to handle registration for NASIG’s St. Louis conference. It was a great experience, where I got to meet experienced librarians, other new professionals, and vendor employees besides my own sales reps. I had a lot to learn about journal management and evaluation, licensing, and more, so it was immensely helpful. I became a member of the Communications and Marketing Committee (well, it was
the Electronic Communications Committee at the time), and I’ve been going to NASIG ever since.

**What prompted you to apply for the Birdie MacLennan award?**

I almost didn’t apply at all. It felt a little presumptuous to apply, as I still feel fairly new to the profession, but I met the qualifications for this mid-career award, so I thought I’d give it a shot.

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

Birdie’s work with SERIALST has certainly enriched my career, so I had a tremendous sense of honor. It has been very gratifying to get so much support and trust from NASIG and its members this past year.

**Which NASIG session(s) did you enjoy the most? Why?**

There were so many good sessions this year that it’s hard to pick. I’ll cheat a little bit and say that the pairing of T. Scott Plutchak and Heather Joseph’s talks was excellent. OA inspires a lot of vitriol and simplistic arguments from its supporters and detractors, so it was nice to get two talks which were at times opposed to each other, but both well-argued and nuanced.

**How might the sessions you attended at the NASIG conference influence your daily work?**

Getting back to that Alma migration, I managed to attend a couple sessions on that very topic and even snagged a couple audience members to speak about it further. E-book management within Alma (or really in any system) is a challenging affair, and it’s great to hear what others are doing.

**What advice would you give to anyone interested in applying for the Birdie MacLennan award?**

Just go for it! Your chances might be better than you think, but if you don’t apply you have no chance at all.

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**John Riddick Student Grant Report**

Natasha Siu, University of North Texas

As a first time attendee of a NASIG conference and the John Riddick Student Grant winner, I knew I was going in to the conference as a sponge, learning from the various sessions and the attendees with their vast experience in libraries. I was very impressed with the conference and grateful to have the opportunity to attend as an award winner.

I really enjoyed learning about other institutions and their migration to new library systems. Coming from a library that is in the middle of data-cleanup in pre-implementation, I was very curious to see how other libraries are handling the changes and what processes are working for them post-implementation. Though the library migrated to a different system, the presentation from Radford University by Kay Johnson and Jessica Ireland confirmed the need for the data-cleanup we are doing and proved to be beneficial in the end for Radford.

Working primarily in acquisitions had me very interested in the use of evidence-based acquisitions (EBA), a method I had not known about previously. The University of Colorado consortia set up different methods of acquisitions in their streaming video services from Alexander Street Press (ASP) and Kanopy. My library currently has a DDA program with Kanopy, so the comparison with ASP’s EBA program was interesting to learn about, though having heard the details it would not be beneficial for our campus. Learning about other library’s explorations and similar situations is the best part of conferences in knowing what you should or should not try as a library.

Both of the vision speakers on open access were interesting and both had valid points in supporting open access. I don’t currently know very much about our institutional repository (IR), but T. Scott Plutchak’s discussion of open access IR’s to support and complement the university sounded like an ideal use of IR space. Heather Joseph put open access in a different perspective for me in altering the question of having
open access “in order to do something significant.” Giving purpose to supporting open access, besides the acquisition and licensing thoughts of saving time and stress, really makes the movement more valuable and worth fighting for continuous progress.

I would suggest to students potentially interested in the e-resources or serials fields to attend NASIG. Again, I feel like the sessions were varied; there was always something to learn about or discover. As a student, I’ve enjoyed attending different conferences of various sizes, but attending NASIG has been my favorite because of the people and the environment and atmosphere the conference plans for attendees.

Conference Reports

Vision Sessions

Dialectic on the Aims of Institutional Repositories
The Power of Open

Conference Sessions

The Canadian Linked Data Initiative
Embracing Evolving Technical Services Horizons
Classifying Librarians
E-books & Open Access Textbooks
Migrating to a Next-Generation LMS
Zine Acquisition and Cataloging
Embracing Undergraduate Research
Evidence-Based Acquisitions
An Example of Librarian/Publisher Collaboration
Incorporating Streaming Video into Workflows
Knowledgebase at the Center of the Universe
Managing Content in EBSCO Discovery Services
The E-Resource Librarian’s Role in Library Service Platform Migrations
Open Access in the World of Scholarly Journals
A Reconsideration of an Academic Library’s Current OpenURL Link Resolver Service
Defining and Refining the Role of Tech Services in New Resource Rollouts
Show Me the Value!
Text Mining 101
E-books & E-serials at the Library of Congress
Using Course Syllabi to Develop Collections and Assess Library Service Integration
An Interlocking Approach of Managing E-Books

Vision Sessions

Dialectic on the Aims of Institutional Repositories
T. Scott Plutchak, University of Alabama at Birmingham

Reported by: Susan Wishnetsky

Vision presenter T. Scott Plutchak began by recounting his past and present work experiences – library director, editor of the Journal of the Medical Library Association, member of the Scholarly Publishing Roundtable which informed the U.S. government’s Open Access policy, and, currently, director of digital data curation strategies at the University of Alabama at Birmingham – which have taken him outside the library and into collaborations with different sectors of the “scholarly communication ecosystem.” These experiences have led him to view publishers and other stakeholders not as adversaries, but as partners who are willing to offer their expertise to find the best ways to innovate and improve the discovery and dissemination of information.

Plutchak recommended the recently published Making Institutional Repositories Work, with a foreword written by Clifford Lynch, executive director of the Coalition for Networked Information. In the foreword, Lynch recalls his own 2003 paper “Institutional Repositories: Essential Infrastructure for Scholarship in the Digital Age,” which envisioned institutional repositories as nurturing innovation and providing homes for new forms of scholarly information previously unavailable to researchers.
Lynch’s early vision stood in contrast to the view presented a year earlier in “The Case for Institutional Repositories: a SPARC Position Paper,” by SPARC senior consultant Raym Crow, which envisioned institutional repositories as mechanisms to move traditional scholarly publishing into academia, to compete with traditional publishers, and to support a transition to Open Access publishing.

Both Lynch and Crow also saw the institutional repository as a mechanism to highlight an institution’s research activities. In recent years, however, research information management systems such as Vivo, Symplectic Elements, and Elsevier’s Pure have emerged, along with tools such as ORCID identifiers and Altmetric. (ORCID identifiers combined with Altmetric are capable of identifying faculty authors and pulling in metadata from their published works. The tools have analytic capabilities to provide a complete picture of faculty output, including information on grants and teaching as well as publications, and they offer collaborative tools to bring researchers together.) Plutchak maintained that such systems eliminate the need for the institutional repository to function as a showcase for an institution’s research output.

Research information management systems cannot provide access to content restricted by license; however, in some cases, institutional repository managers are able to provide access to some version of their faculty’s published works through the institutional repository. Plutchak warned that posting additional versions of articles available elsewhere brings its own problems. For example, if the institutional repository’s version has not undergone peer-review, it may not be pointing patrons to the best, most authoritative version of the content. If the article submitted to the repository is later corrected or retracted, it is unlikely that the version in the repository will contain those updates.

While today’s repositories house many of the types of unpublished material Lynch had in mind – theses, dissertations, multimedia formats, syllabi and other teaching material, and research data – there is still a widespread focus on obtaining versions of peer-reviewed articles, with some libraries imposing mandates on their faculty to deposit some version of their publications.

Due to the National Institutes of Health’s (NIH) public access policy, federally-funded medical research is now being made openly available; other federally-funded research may soon follow. (The European Union is developing similar policies.) Since PubMed Central and other well-curated repositories are hosting this research, Plutchak wondered why institutional repositories duplicate their effort by hosting additional versions of the same content.

As for Crow’s vision of moving the functions of traditional publishing into academia, Plutchak acknowledged the work of the Library Publishing Coalition and its members in that area, but concluded that we mostly remain dependent upon traditional publishers.

Plutchak wrapped up by supporting the use of research information management systems to manage faculty metadata and promote institutional research, and calling for greater attention to the often neglected issues of interoperability among institutional repositories and the creation of a network of repositories.

He urged a reduction in duplication of traditionally published content in institutional repositories and an effort to point patrons to an article’s version of record (or the closest version to it that is available). Plutchak concluded that the focus for institutional repository managers should be on making available more material that falls outside of traditional publishing.

When asked what existing group might create the network of repositories he mentioned during his presentation, Plutchak pointed to the publisher group Clearinghouse for the Open Research of the United States (CHORUS) (http://www.chorusaccess.org/) and the academic group SHARE (http://www.share-research.org/) as organizations already working along those lines. An audience member suggested that the
“publish or perish” standard for faculty was leading to the rise of predatory publishers. Plutchak agreed, and said that the Open Scholarship Initiative (http://osinitiative.org/) was planning to reach out to university administrators to discuss reforming the process of promotion and tenure.

In addressing a question on how much time librarians should spend creating metadata, Plutchak acknowledged that there are always more things that need doing than time or energy to do them, and advised focusing on areas where the most can be accomplished with the greatest ease to avoid areas that may cause roadblocks and frustration.

One audience member mentioned smaller, less sophisticated journal publishers whose content tends to move around and sometimes disappear, and wondered if institutional repositories might play a role in preserving that material. Plutchak recommended that such publishers might be directed to other established repositories that specialize in preservation, but agreed that a library could take on such a role if they made a commitment to “adopt” the journal and take responsibility for it.

Another audience member indicated that many faculty members are depositing material in ResearchGate, and ignoring the library’s repository. Plutchak admitted that despite ResearchGate’s faults, many researchers like the “social networking” features that library repositories cannot provide, and suggested that we need to reconsider the role of our library repositories in the information ecosystem.

Several audience members asked about including undergraduate projects; Plutchak responded that giving citations and DOIs to these works provided a tremendous service to students. One commenter noted that there was little discussion of preservation in Making Institutional Repositories Work, and wondered if it had been overlooked. Plutchak opined that real long-term preservation was very tough and probably should not be the focus of a single, stand-alone institutional repository.

The Power of Open
Heather Joseph, Executive Director, Scholarly Publishing and Academic Resources Coalition (SPARC)

Reported by: Rachel Miles

Heather Joseph spent fifteen years as a publishing executive in both commercial and not-for-profit organizations before serving as SPARC’s Executive Director. SPARC (Scholarly Publishing and Academic Resources Coalition) leads efforts in the U.S. and worldwide to create and maintain Open Access policies and practices. Access to information, data, research, and educational resources has never been more promising; yet, much of this crucial information is still concealed from the general public and the researchers most in need of using it due to publisher pricing, restrictive licenses, and prohibitions on reuse. Joseph opened the session with the current state of the Open Access (OA) movement, and in particular, the Budapest Open Access Initiative (BOAI), which has worked for the past decade to “provide the public with unrestricted, free access to scholarly research” (http://www.budapestopenaccessinitiative.org/read). The original BOAI declaration asserts that “an old tradition and a new technology have converged to make possible an unprecedented public good” (http://www.budapestopenaccessinitiative.org/read). While the OA movement has certainly made great progress in the fourteen years since the BOAI declaration was written, there are still many complex barriers to overcome.

Today, as in the past, scholars share their research and creative works without the expectation of compensation in order to build upon existing knowledge and to enhance their research skills and professional development. The concept of “open” removes the barriers to access by allowing everyone — the research community as well as the general public — to immediately and freely access and reuse content. Joseph described scholarship as an ecosystem of sharing.
As library budgets have shrunk or remained stagnant, journal prices have increased. The traditional publishing model is no longer sustainable and some stakeholders, including faculty, students, policy makers, funders, individual publishers, and members of the public, believe that scholarship deserves a model that allows for the greatest return on investment. Joseph highlighted several examples of opening up research to all, with one remarkable instance standing out among the rest: between 1988 and 2012, researchers with the Human Genome Project decided that all data and new information produced would be “freely available online within 24 hours of discovery” (http://sparcopen.org/impact-story/human-genome-project/). The project generated $956 billion in economic output with more than $293 billion in personal income through wages and benefits. Economics aside, the project also led to a number of scientific breakthroughs and helped develop new DNA screening tests and diagnostic tools “capable of quickly identifying diseases and infections” (http://sparcopen.org/impact-story/human-genome-project/).

Despite inspirational success stories, there is still a long road ahead for the Open Access movement and its advocates. Joseph describes SPARC’s involvement in the OA movement as “too close” and “in the trenches,” which often leads to difficulty in recognizing the greater implications of Open Access; this simple awareness led SPARC to first assess the OA landscape and then develop strategies based on their assessment.

When SPARC was established in 2002, there was a great deal of “stumbling around in the dark” before learning how to navigate the landscape of the OA movement. Overall, SPARC deduced that there are four themes that need to be addressed in order to move forward:

1. The Open Access landscape is much greater and more complex than we realized. Open Access applies to not just scholarly journals, but to data, software, educational resources, and more.
2. SPARC must now define its end goals in order to communicate to stakeholders the impact of defaulting to “open” in research and education.
3. SPARC’s goals must not advocate for “open” for “open’s” sake. SPARC must address what “open” achieves.
4. SPARC intends to help start a movement that will reward “open” in meaningful ways.

Recently, an opportunity arose to assist SPARC in promoting its newest initiatives. In October 2015, Vice President Joe Biden developed a plan to lead a “moonshot” to cure cancer (http://www.sciencemag.org/news/2016/01/what-vice-president-biden-s-moonshot-may-mean-cancer-research). The effort intends to accelerate progress for cancer treatments and to find strategies to take barriers down that prevent researchers from making progress.

SPARC, with Joseph leading at its helm, has determined that certain obstructions prevent the progress of the OA movement. While the task ahead appears daunting, the overwhelmingly positive responses to the OA movement from past initiatives has propelled the advancement of research forward. Joseph asserts that the time has now come to break through the obstacles that continue to stall progress in science and the arts by changing the conversation from talking about “open” for the sake of “open” to helping stakeholders understand the consequences of a world in which publishers control the majority of access to scholarly and educational content. Librarians can make, and have made, a ubiquitous influence on the scholarly community and the general public, and they will continue to do so.

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**Conference Sessions**

**The Canadian Linked Data Initiative:** Charting a Path to a Linked Data Future  
*Marlene van Ballegooie, University of Toronto Libraries*  
*Juliya Borie, University of Toronto Libraries*  
*Andrew Senior, McGill University*  

Reported by: Susan Wishnetsky

Marlene van Ballegooie began the presentation with some background on the Canadian Linked Data Initiative. In the fall of 2011, the Library of Congress announced its Bibliographic Framework Initiative would eventually replace the MARC format. Just over a year later the BIBFRAME model for bibliographic description was introduced. When Library of Congress catalogers began testing BIBFRAME for a wide variety of formats and languages in August 2015, the coming changes became real and urgent.

In the U.S., a transition team was already being formed. Linked Data for Production (LD4P), a collaboration of five universities (Columbia, Cornell, Harvard, Princeton and Stanford) with the Library of Congress was formed to reinvent the production of metadata, to work with standards organizations to establish common protocols and procedures, to test and expand the BIBFRAME ontology, and finally to transition library systems to the linked data model. A related project, BIBFLOW, was established to analyze existing workflows in library systems and find ways of migrating them to the new model.

The major research universities in Canada have a long history of collaboration on many projects, including sharing a single library platform. Via one of their regular teleconferences, the five largest research libraries in Canada (University of Toronto, University of British Columbia, McGill University, Université de Montréal, and University of Alberta) formed their own joint initiative to develop a path toward linked data.

In September 2015, they held a daylong meeting with LD4P members and other experts at the annual Access Conference in Toronto, which resulted in an agreement to cooperate, a communication plan, the development of initial working groups, and the inclusion of three additional libraries which were national in scope (Bibliothèque et Archives nationales du Québec, Canadiana.org, and Library and Archives Canada) to the initiative. More working groups and relationships between them were later established, presented by Juliya Borie as a linked-data cloud:

There is also a steering and planning committee consisting of associate university librarians and working group chairs, which meets via a monthly conference call; it is intended to provide vision, enthusiasm, and leadership to the members of all the working groups. A shared web space was quickly established for documentation.
The Summit Planning Working Group has scheduled its first Linked Data Summit for October 24-26, 2016, in Montreal. The Grants Working Group has prepared a grant application to the Social Sciences and Humanities Research Council, a national funding body. The Education and Training Working Group is collecting resources and preparing to train others by educating themselves. They have participated in online training and made several presentations on linked data to staff and senior management. The Digital Projects Working Group has identified possibilities for collaborative projects around linked data, including student publications, historical postcards, and a collection to celebrate the 150th anniversary of Canada in 2017. The French Language Working Group will assist with translation of documentation and try to identify the needs of the French-speaking community for authorities and identifiers. The Identifiers Working Group is tackling the enhancement of legacy data with URIs and other linked data elements, and exploring how linked data tools such as OpenRefine, MARCEdit BibNext, Catmandu, Karma, and RIMMF (RDA in Many Metadata Formats) can be used in metadata production. The BIBFRAME Editor Working Group is testing and examining tools when available (e.g. BIBFRAME Editor from the Library of Congress and BIBFRAME Scribe from Zepheira). The IT Working Group was only recently formed, to enable the integration of linked data into digital repositories and provide programming expertise. The User Experience Working Group, of course, is planned for the future.

Andrew Senior concluded by listing the challenges ahead: the “big picture” challenges of funding, coordination, and reaching multicultural and multilingual institutions over the wide expanse of Canada, as well as the individual challenges of incorporating new workflows and making the “mental shift” to new ways of thinking. Future challenges will involve migrations, working with vendors to ensure interoperability of systems, and finding “meaningful” ways to connect library data to the web. Senior recommends small steps and patience, combined with a culture of learning and an atmosphere of optimism.

Charting a Course toward Embracing Evolving Technical Services Horizons
Nadine Ellero, Auburn University

Reported by: Kelli Getz

Nadine Ellero, head of Technical Services at Auburn University, began her tenure by analyzing current processes in technical services. She quickly noticed that the department faced many challenges, including creating more efficient ways to serve users; pruning and maintaining print resources; and maintaining print and electronic workflows.

As the department’s leader, Ellero had to make the environment safe for staff to provide honest feedback. She met with each staff member to learn their “pain points.” She felt that this was an important step because it fostered an environment of honesty and respect. It became clear that the experienced staff had
been overlooked for some time, and they felt uncertain managing electronic materials and dealing with the increasing complexity of the work.

In addition, she faced blending new staff into the department. In bringing the disparate groups together, she focused on seeking the truth, doing the right thing, and promoting respect through frequent communications. It took nearly a year to gain staff trust, but she eventually did see results of her hard work.

She felt responsible for creating a new culture of servant leadership based on growth, caring, and communication. The first step in implementing the new culture was to focus on personal growth. Personal growth would allow staff to better embrace change. Ellero found that she often became a counselor for staff on their personal growth journeys.

Additionally, Ellero sought to instill and emulate a learning and productive environment that invites expression of thoughts and ideas, especially those unknown or unpopular. Her staff has become a group of individuals who value and work on the art of listening, who reflect and share to effectively solve problems, who create new products and services by seeking truth, by promoting respect, and by helping each other.

Ellero emphasized the importance of frequent communication. Her next project is to work on holding effective large group meetings to solicit more meaningful feedback. She makes it a point to touch base with each staff member as often as possible as part of her communication strategy. Ellero feels that it is time well-spent due to the professional growth demonstrated by her staff over the past year.

Ellero cautioned against potential pitfalls, such as experiencing burnout. She experienced burnout because most days she was unable to get her own work completed due to spending so much time working with staff. The burnout went unchecked and eventually caused her physical ailments. Also, both Ellero and her staff had to learn that it was impossible to control everything and that mistakes were going to happen. Ellero chose to accept the mistakes as learning opportunities. Additionally, she had to accept the inevitable conflicts that she would encounter.

Overall, Ellero transitioned reluctant, experienced staff into more open-minded individuals by building up their self-esteem and empowering them to make decisions.

**Classifying Librarians:**

**Cataloger, Taxonomist, Metadatician?**

*Beverly Geckle, Middle Tennessee State University*

*David Nelson, Middle Tennessee State University*

Reported by: Marsha Seamans

Beverly Geckle and David Nelson reviewed approximately 300 job ads from 2013 to 2016 that had “cataloging” or “metadata” in their title or job description. They deconstructed the job ads as well as analyzed the use of the terms “cataloging” and “metadata” in order to identify trends within the profession. They did not examine organizational structures of the institutions for whom the jobs were posted.

The analysis identified fifty-four unique job titles, including ones which contain some form of “cataloger/cataloging,” “metadata,” “metadata and cataloging,” “metadata and [something else],” as well as many where the terms were just part of the job description. Besides the proliferation of job titles, a number of general observations emerged. Job ads for cataloging and metadata services included a high, perhaps unrealistic set of expectations that blend cataloging and computer programmer expertise. The length of the job ads has increased, along with desired personal qualities listed in the job description. Besides the proliferation of job titles, a number of general observations emerged. Job ads for cataloging and metadata services included a high, perhaps unrealistic set of expectations that blend cataloging and computer programmer expertise. The length of the job ads has increased, along with desired personal qualities listed in the job description. Finally, the use of the term “metadata” was ambiguously defined in job description postings.

The qualifications in job ads often included knowledge of or experience with both cataloging and metadata standards, as well as programming skills and software
knowledge. Additionally, the ads usually required previous experience. These trends raise a number of questions and concerns: Is expertise being sacrificed for doing more? How does one demonstrate experience? How do we train future librarians if experience is a requirement? Finally, as we look at the direction in which libraries are headed, will we start seeing job ads for linked data librarians?

Some of the personal qualities that appeared in job ads included: innovative, creative, energetic, self-motivated, collaborative, forward-thinking, knowledgeable, service-oriented, dynamic, flexible, and detail-oriented. The use of these evaluative adjectives raises the questions of how these are presented by candidates and how they are judged by those doing the hiring.

Despite the proliferation of the term “metadata” in job ads, the definition remained elusive, and the presenters wondered if the term “cataloging” is now deemed archaic and “metadata” is more current. Metadata is typically defined as data about data, but job qualifications typically reference knowledge of content standards such as Library of Congress Subject Headings, Library of Congress Classification, Dewey Decimal Classification, the Art & Architecture Thesaurus, the Union List of Artist Names, and the Thesaurus of Geographic Names. Metadata often refers to schemata rather than content standards. The presenters argued that what is really needed is “data value creators using metadata standards.” Catalogers might be thought of as taxonomists rather than metadata librarians, with taxonomy being defined as the science of classifying things.

As expected, the deconstructed job ads identified a number of trends in the profession and raised important questions. This presentation engaged the audience with a lively discussion about this trend. The presenters concluded by suggesting participants read Heather Hedden’s *The Accidental Taxonomist*.

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**E-books for the Classroom & Open Access Textbooks: Two Ways to Help Students Save Money on Textbooks**

*Jason Boczar, University of South Florida*

*Laura Pascual, University of South Florida*

Reported by: Nancy Hampton

Jason Boczar and Laura Pascual work in the University of South Florida Library (USF). Boczar is the digital scholarship and publishing librarian. Pascual is the electronic resources librarian and manages the university’s “E-books for the Classroom” program. Their presentation focused on three main topics: the need for textbook affordability programs; initiatives the USF is taking in this area; and how two programs were implemented (E-books for the Classroom and Open Access Textbooks).

Between 2002 and 2012, the Government Accountability Office determined that textbook prices increased 82%. At USF over half of all students receive financial aid packages that include Pell grants, scholarship aid, and federal student loans. When surveyed, over half of respondents admitted to foregoing the purchase of textbooks due to cost, despite the fact that this decision could negatively impact their grades. On October 8, 2015, the Affordable College Textbook Act was introduced in the United States Senate. This Act directed the Department of Education to make competitive grants available to institutions of higher education to support pilot programs that expand the use of open textbooks.

In response to the need for affordable textbooks, Boczar and Pascual created the Textbook Affordability Project. They determined that librarians, with their knowledge of instructional materials and their experience with publisher licenses, are well suited to provide advice on e-books, reserves, Open Access, and the best textbook price advice to faculty and students. The USF Library developed a website with information about the most affordable textbooks, e-books for the classroom, course reserves, and Open Access textbooks. Their website recommends that faculty request open
DRM e-books so that students can access supplemental readings as well as required readings online.

Open Access textbooks are encouraged because faculty at USF can control the content of the textbook as well as its cost. In addition, Open Access textbooks can incorporate interactive materials such as videos and maps, and they can be hosted on the university’s institutional repository. In order to increase faculty participation, USF librarians worked with the Provost’s Office to promote the creation and use of Open Access materials.

Boczar and Pascual described challenges they experienced while assisting with the creation of Open Access textbooks, including that different Open Access platforms use different formats. For example, they noted that one platform may use the iBook format and another may simply use PDF. When PDF is used, a separate PDF should be created for each chapter rather than each book. This will allow patrons to download or print only the chapters that they want.

The library team also needs to locate peer reviewers, provide copy editing, and host the content on the university’s institutional repository. Peer reviewers need to be given ample time to review the materials once they receive them. Faculty authors will need to be compensated for their time. Librarians will need to gather all copyright permissions as early as possible. The presenters noted that getting these permissions can be time consuming. Once a new Open Access textbook has been created, the Library should inform all faculty about the new resource even if it is not within their discipline. Once they see how Open Access works, they will want to create material of their own.

In 2015, Radford University decided to migrate to OCLC’s WorldShare Management Services (WMS). Kay Johnson and Jessica Ireland shared their experiences with the migration process and their analysis of the workflow within the Collection and Technical Services (CaTS) Department at McConnell Library. One of the first instrumental decisions was to evaluate what data would migrate and what would not, along with assessing what data in records would need to be cleaned up before migration. WMS migrated bibliographic and items records, along with patron and circulation information, reserves, and holdings records as expected. The knowledgebase, acquisitions and electronic resource management system (ERMS) data, check-in records, and authority records were items that would not migrate and careful planning was needed to manage accordingly. Attendees learned how Radford University’s librarians dealt with the difficult challenge of accurately reflecting thousands of local holdings records for their serials in OCLC while retaining critical data in check-in notes, such as routing information, coverage, and other important detail information during the migration process.

Next, the speakers shared how they mastered setting up the knowledgebase, aptly named Collection Manager. One huge challenge was the inability to batch import data into OCLC’s knowledgebase (this would create custom collections that would not be updated automatically by OCLC). Therefore, the librarians decided to individually update collections and titles, a huge undertaking, but one that was needed in order for the collections to be automatically updated by OCLC. Although this process was not the most streamlined, they loved the ease of turning on collections and individual titles in WMS, along with the ability to access links between the knowledgebase and financial data in
the acquisitions module. There is, however, improvement needed with accurate linking to streaming videos and music collections, more timely removal of titles from various collections, and providing better refined searching.

When switching library management systems, is it important to not only carefully plan out all the details of what and when to move data, but also to train staff in the new system. The library took on this challenge by having weekly meetings and utilizing many training videos, in addition to collaborating and networking with various other universities to better learn from their experiences. They also examined their workflow, proposed changes, and hosted question and answer sessions with their staff. One particular idea which alleviated apprehension among staff was having a special “CaTS” (Cataloging and Technical Services) Retreat. This was an opportunity to go through NASIG Core Competencies, conduct PEST (political, economic, socio-cultural, and technological) and SWOT (strength, weakness, opportunity, threat) analyses, and review the position descriptions of various staff.

Post-migration projects naturally developed during the migration process. Primary focus was given to verifying the accuracy of serials titles, local holdings records, and simplifying journal location fields. Another post-migration project involved creating order records and updating historical payment information in the new system.

Overall, the Radford University librarians were pleased with the relatively smooth process of migration. They unified and carefully planned in a very limited timeframe, and most impressively had less than one percent of their records not match up with OCLC’s bibliographic records! Best of all, they were pleased that OCLC’s WMS and knowledgebase operates on all browsers and electronic devices.

In the future, they will continue to review possible changes to positions and workflows; submit enhancement requests as needed; populate a license manager; and develop procedures for their department.

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**Embracing the Zines: Zine Acquisition and Cataloging at the Vassar College Library**

Heidy Berthaud, Vassar College

Reported by: Scott McFadden

Zines are self-published works, created by individuals or groups, usually sold or distributed directly by their creators. They represent voices and narratives often absent from traditional publishing. The library of Vassar College, a private, four-year liberal arts college with a diverse and socially active student body, maintains a zine collection. The collection consists of 182 cataloged zines, with others waiting to be cataloged. Cataloging these materials began in 2014, and the zines were made available to the public in the catalog in the fall of 2015. While zines can cover a wide variety of subject matter, Vassar collects mostly ones pertaining to political issues.

The concept of ethical zine collection is central to Vassar’s collection development policy. Most zines are not done for profit, and zine creators, a.k.a “zinesters,” spend their own money to produce zines. Thus, a policy of ethical zine collection suggests the library should purchase the zine directly from the creator whenever possible, which helps the zinester defray costs. When direct purchase from the creator is not feasible, a second choice is to purchase from a zine distributor, a.k.a. “distro”. It is also considered ethical to give the zine creator the right of refusal, as some creators intend their zines for a particular specialized audience and prefer that they not be more widely available to the public at large. In practice, Vassar has found that most zinesters are happy to be included in the collection, and the library has received many thank you notes from creators.

Unlike traditional publishing, zines require much more active searching on the part of the acquisitions librarian. Sources such as Twitter, Etsy, and Tumblr are good ways to find zines. As mentioned above, online distros are also good sources of zine content. While the zine creator does not typically receive as much money for a zine purchased through a distro as one purchased directly, they do still receive some remuneration.
Cataloging zines can create a number of challenges, since many zines deliberately decline to follow the paradigms of traditional publishing. For example, in many cases, common elements such as dates of publication or places of publication are simply not present. It may even be difficult to discern the intended title of the zine. Zines are deliberately radical and unconventional. For this reason, local practices will play a large part in a library’s cataloging of zines.

Identifying a zine’s author can also be challenging, as many authors employ pseudonyms, and in some cases have reason to prefer the anonymity this provides. In many libraries which collect zines, the MARC name qualification $c (Zine author) has begun to be used in name authority records. For example, a zine might be entered under the heading Rachel $c (Zine author). Vassar maintains a file of known zinesters, as well as their names and preferred pronouns. Another development among libraries which catalog zines has been the creation of a metadata standard called xZINECOREx. Based on Dublin Core, xZINECOREx offers metadata elements important to zine publishing, including subject matter, genre, content notes, freedoms and restrictions on distribution, provenance, and trigger warnings.

Because of the unconventional nature of zines, Library of Congress Subject Headings (LCSH) are often not a good fit for the subject matter of these publications. Vassar’s zine collection is heavily focused on diversity, and LCSH is often at odds with the terms that zinesters use to describe themselves. Those outside the traditional gender binary, as well as genderless people, are not well represented by the terms of LCSH. Vassar attempts to use language that is inclusive and that reflects the usage of the community being described. Thus, local subject headings are created when necessary. For example, the term “transsexual” is controversial within the zine community, and so it is used as a subject heading only when it actually appears in the zine being cataloged. In addition, Vassar has established local subject headings for terms such as “white privilege” and “non-binary gender,” even though such terms are not included in LCSH. This policy is an attempt to be true to the resource being cataloged, rather than being true to the cataloging code. In cases where subject headings seem inadequate, the cataloger may also rely heavily on summary notes, which attempt to include as many keywords as possible that might be searched for by researchers.

The session concluded with an activity for the audience that illustrated the challenges in cataloging zines. The audience members were shown examples of zines that posed particular cataloging difficulties.

Embracing Undergraduate Research:
Creating the Arsenal
Melissa Johnson, Augusta University
Kim Mears, Augusta University
Reported by: Maria Aghazarian

Melissa Johnson and Kim Mears presented in NASIG’s first Skype session on how Augusta University’s libraries were involved in the creation of a new Open Access undergraduate research journal, Arsenal. They presented a detailed report of the journal’s creation, including empowering interested students, creating a journal identity that meshed with the University’s identity, and discussing challenges and future plans.

Johnson and Mears began with some context for the educational system of the university, which was recently reformed as a consolidation of two public Georgia universities. The university highly values undergraduate research and has two research programs in place, including the Center for Undergraduate Research and Scholarship (CURS). Excited to share their research, students formed an organization called On the Shoulders of Giants (OSG) and approached CURS with the idea of starting a journal. The importance of the journal was evident: publishing allows students to see the value of their research by making it publicly available, establishing students as the creators of knowledge as well as consumers.

A major success of the journal was the ability to show CURS that costs could be kept to a minimum. The
in机构al repository was chosen as the journal’s home due to supported web hosting, archiving, and platform stability without extra cost or staffing. Article submissions were handled through a Wufoo form, as the university was already a subscriber. A LibGuide was created for the journal’s homepage to give students more control over the look and feel of the site. OSG’s student organization budget funded CrossRef fees so DOIs could be assigned to published articles.

Finding an appropriate name was challenging. The students originally wanted to name it after OSG, but their advisors recommended coming up with a title that would connect more closely to the university’s identity. This would encourage faculty and student buy-in, and showcase the journal as a part of the university’s research identity. In the 1800s, the Summerville campus was an arsenal, so the name “Arsenal” had significance.

The editorial board is composed of faculty members, librarians, and OSG student members, providing a great opportunity for librarians to teach students about copyright and Open Access. While they had support, students were primarily responsible for the core decisions of the journal, such as aims and scope, metadata infrastructure, and the peer review model. One of the most important decisions was to create a faculty mentor consent form. This form required student authors to seek guidance from a faculty member who would oversee ethical and legal aspects of the research, including institutional review board (IRB) approval.

An unexpected challenge to the Arsenal was apprehension from CURS faculty. Some faculty members were hesitant to encourage students to submit to the journal because they wanted to ensure that the articles produced were credible scholarly products. Sustainability is an ongoing challenge, especially considering the rate of faculty turnover since the consolidation.

Future plans for the journal include applying for Directory of Open Access Journals (DOAJ) inclusion, creating subscription notifications when new issues are published, continuing to increase faculty buy-in, marketing of the journal, and indexing of the journal articles.

Exploring the Evidence in Evidence-Based Acquisitions

Stephanie J. Spratt, University of Colorado Colorado Springs

Reported by: Derek Wilmott

Stephanie Spratt shared the University of Colorado (CU) Libraries’ experience with two different demand-driven acquisition platforms. She and her colleagues at the University of Colorado campuses - Colorado Springs, Boulder, and Denver, had the opportunity to compare both the Alexander Street Press evidence-based acquisition (EBA) model with Kanopy’s patron driven acquisition (PDA) model for streaming video.

The CU Libraries began comparisons with usage statistics. Issues that arose included the types of usage statistics available; interpretation of the gathered usage statistics; and other data provided in the usage reports. A second comparison focused on assessments of the EBA and PDA models and workflow comparisons to other resources or models.

Spratt first pointed to differences and similarities between the EBA and PDA models through the lens of the Alexander Street Press and Kanopy platforms. In the case of Alexander Street Press EBA, there is an up-front monetary commitment with the cost known at the program’s start. Selections are mediated, as the collection development librarian decides titles to purchase at the end of the contracted time. Kanopy’s PDA, on the other hand, has quarterly invoices for videos accessed, and a less flexible spending option that requires a deposit account for libraries. Video selection is not mediated and relies on patrons to trigger purchases.

According to Spratt, the licenses for streaming videos in Kanopy have a default setting of one or three years. The
library can decide subject areas and producers they wish to activate and they enjoy full public performance rights. Both Alexander Street Press and Kanopy provide the following: free MARC records for discovery; accessibility features; library management system (LMS) integration; and a flexible clip and playlist construction by a patron.

The CU Libraries examined the setup, maintenance, and assessment process for both platforms. The initial setup for the Alexander Street Press EBA program needed an up-front decision as to where to place access points into the platform. It was noted that with the Kanopy PDA platform, selecting subject area or producer collections took more time than activating the entire catalog. MARC records for both platforms required de-duplication efforts in the libraries’ LMS. This meant that when one institution purchased a title, the other libraries needed to suppress the title from displaying for the rest of the consortia. The Alexander Street Press EBA program required constant monitoring by staff to track usage and make purchasing decisions for the consortium by the program’s end. One concern was the possibility that individual title selection could cause double payment, if a subject collection was purchased at a later date. The Kanopy PDA platform does not require staff to monitor usage for triggering a video licensing event. However, staff did spend more time managing quarterly invoices and tracking the deposit account, if that option was selected. Finally, Kanopy licenses needed to be reviewed for renewal before the expiration of the program.

The last part of the presentation focused on what the CU Libraries learned, pointing out the best features of both programs, and describing the next steps that they decided to take. Spratt advocated for the need to actively promote the programs. Cost is definitely a factor in deciding which platform to use. Setting up platforms required two months, which they felt was excessive. There was also a need to manage faculty expectations. Spratt gave the example that University of Colorado Colorado Springs no longer had access to the PBS streaming videos, which disappointed some faculty.

The Alexander Street Press EBA model is best suited for libraries with available space in their budgets for perpetual access streaming video. It has extensive program offerings, and patrons can provide input on which subject areas have need for streaming video. The Kanopy PDA model is best suited for libraries with limited budgets. The model is also suited for libraries that value access over ownership and/or prefer requests for streaming videos in specific subject areas.

The CU Libraries decided to replace their Alexander Street Press EBA platform with individual Academic Video Online: Premium (AVON) subscriptions and to continue with the Kanopy PDA platform for another year. Their next steps will include devising a license management workflow and electronic resource management (ERM) tracking.

There were a few questions that centered on workflow issues and a comment that maintaining two different platforms seemed like a lot of work. Spratt acknowledged the sentiment and noted that the CU Libraries were not prepared to deal with how challenging usage data collection would be for them. Finally, Spratt described the workflow process for introducing MARC records first into the catalog and then adding them to the discovery layer.

The Future of Information Literacy in the Library: An Example of Librarian/Publisher Collaboration
Rebecca Donlan, Florida Gulf Coast University
Stacy V. Sieck, Taylor and Francis

Reported by: Stephanie Spratt

Taylor & Francis (T&F) is putting more focus on content and services to aid in information literacy (IL) instruction. To demonstrate this, Stacy Sieck of T&F partnered with Rebecca Donlan of Florida Gulf Coast University (FGCU) in a collaborative project to update and rebrand the library’s IL instruction efforts. They co-presented a poster session, Stop, Collaborate and Listen, at the 2015 Charleston conference and presented an informational session at NASIG.
Librarians at FGCU are academic faculty and have established relationships with other campus faculty through liaison work and committee work. Using the ACRL Framework for Information Literacy for Higher Education and focusing on undergraduate research, the FGCU librarians did their best to provide quality IL instruction. Finding that just-in-time instruction was more beneficial than just-in-case instruction, the librarians disclosed their findings to faculty. The librarians and the writing center faculty collaborated to propose improvements to the curriculum that resulted in a partnership and a requirement for all students to participate in IL activities throughout their programs.

The FGCU Scholars: Think, Write, Discover program was developed to improve IL instruction. The library and writing center faculty created a rubric incorporating critical thinking and IL components that identified benchmarks for students to meet throughout their college careers, including a capstone project intended to be met by graduation. However, current students had difficulty meeting benchmarks and milestones indicated on the rubric. The goal of the current project is to overhaul the IL instruction program to improve the results of incoming students as they progress toward graduation.

T&F is collaborating with the FGCU Scholars program to develop a literacy toolkit using webinars, instructional materials, a website, and in-person workshops. This toolkit will be designed to help students achieve the benchmarks defined in the FGCU rubric. T&F was interested in developing an IL program after holding a forum with librarians in March 2015. During that forum, T&F discovered that IL instruction is a shifting and challenging responsibility for librarians.

The launch of the updated IL instruction program is planned for fall 2016. In order to be successful, the collaborators noted that faculty buy-in is essential, timing is important, and marketing will need to be used to build interest. Additional components of the new IL instruction program include partnering with FGCU’s undergraduate research journal and getting student work into FGCU’s institutional repository. They plan to assess the program after five years.

**Juggling a New Format with Existing Tools: Incorporating Streaming Video into Technical Services Workflows**

*Jennifer Leffler, University of Northern Colorado*

Reported by: John Kimbrough

“Dealing with streaming video can feel like you’re juggling fire,” warned Jennifer Leffler at the start of her presentation. Format complexities, copyright questions, authentication issues, and user expectations are just some of the difficulties posed by streaming video. Leffler exhibited existing workflows for streaming videos at the University of Northern Colorado (UNC), and then described some of the challenges encountered by UNC staff in cataloging videos and making them accessible.

Within UNC’s Technical Services Department, streaming video orders are initially entered into the ILS, and then passed to one of the two technical services managers (Leffler and her colleague Jessica Hayden). The managers handle licensing and copyright, seeking permission to stream the video at UNC. Amenable copyright holders and/or vendors provide access to streaming videos in a variety of ways. Some simply grant permission for UNC to locally host and stream the video, either from an existing DVD or a file sent by the vendor. In these cases, technical services staff obtain a DVD copy and arrange to host the file on a local video server maintained at UNC. A second way to provide access is by linking to the video via a vendor’s website, YouTube, or Vimeo. Leffler related one copyright holder that granted permission, then sent 100 user/password keys to a password-protected Vimeo video, leaving technical services staff the task of distributing and managing keys. Once access to the video is obtained, the order is paid and the video is cataloged.

Many streaming video permissions are only granted for a finite period, such as one year or three years. To track expiration dates, UNC makes entries for streaming
videos in their ERM, and uses existing ERM workflows to generate reminders when videos are up for renewal. Leffler posed several questions about streaming video processing for audience discussion using some of the issues that had arisen at UNC while developing workflows:

- Are multi-year video leases treated as monographs or serials? (UNC treats them as monographs.)
- If the library acquires a title in both streaming video and DVD, are these formats cataloged together or separately? (UNC catalogs separately.)
- Should libraries track streaming video usage, and if so, how much of a video has to be watched to “count” for usage? (Some legitimate uses could be quite brief, such as scene studies in a theater class.)

Providing discovery and access of streaming video is an ongoing challenge. At UNC, all videos are cataloged, either with vendor-supplied MARC records or original cataloging. UNC inserts local descriptors for streaming video records (e.g., “sv” prepended to the call number to help identify streaming videos). Although UNC’s discovery layer tool can ingest MARC records, the process strips away some of the format-specific information, making it difficult for users to find videos. In addition, some knowledgebase vendors have worked directly with video providers to ensure their entire inventory is available in discovery tools, posing difficulties for libraries who only subscribe to a selection of the provider’s content.

Much like a novice juggler, managing streaming video can initially feel like an exercise in dropping balls. However, according to Leffler, things do get better with practice. The days when we can juggle streaming videos with aplomb and ease may be far off, but sharing ideas helps make progress towards that goal.

Knowledgebase at the Center of the Universe

Kristen Wilson, North Carolina State University

Reported by: Sanjeet Mann

Conventional wisdom has long held that bibliographic records are the most important resource for describing library collections, and the catalogs that contain them are the preeminent library system, central to all workflows. However, much as the Copernican revolution transformed views on the natural world and social order by demonstrating that the Earth orbited the Sun, so too is the prominence of electronic resources leading to a paradigm shift in the way we think about library systems. Kristen Wilson, Associate Head of Acquisitions and Discovery at North Carolina State University Libraries, has distilled this new thinking into a forthcoming Library Technology Reports issue. At this session she shared her research with NASIG, explaining why knowledgebases have supplanted the catalog as the crucial library system undergirding patron discovery and staff workflows. She also surveyed the current state of knowledgebases and reported on efforts to make them even more collaborative and global in scope.

Wilson defines a knowledgebase as “structured data describing the institutional collection and how to access it.” Knowledgebases combine descriptive metadata about an information resource (such as the title or a publication date range) with acquisitions information (such as the package in which it was sold or the library’s subscription entitlement). Knowledgebases exceed the capabilities of the traditional catalog by blending global data true for all libraries with local data specific to a given institution. Wilson offered an example by comparing a knowledgebase record for Serials Review to the corresponding bibliographic record, which lacks information about previous providers, perpetual holdings, and alternative access through aggregators. Because they are aware of resources in a global and local context, knowledgebases serve as an “identity broker” that orchestrates the proper function of other library systems.

Wilson envisions knowledgebases at the center of four core library services: electronic resource management systems (ERMS), OpenURL link resolvers, MARC record exporting, and discovery services. More satellite services are drawn into the knowledgebases’ orbit each year, including resource sharing, ordering and invoicing functionality, application programming interfaces (APIs), and linked data services.
The centrality of knowledgebases makes their maintenance and design all the more important. Wilson reviewed the metadata supply chain connecting content providers (who create and sell metadata), knowledgebase vendors (who normalize metadata) and libraries (who display and help troubleshoot metadata). In practice, these roles are blurred; the proliferation of competing knowledgebases leads to duplicated effort for content providers and libraries alike; and erroneous titles, holdings, and identifiers trigger frequent linking errors. Fortunately, widespread adoption of the NISO KBART recommended practice is helping to make knowledgebases more accurate.

By examining case studies of how various proprietary vendors and open source initiatives are developing their knowledgebases, Wilson was able to identify trends in knowledgebase design. Knowledgebases are expanding to include more kinds of information content and track changes in content over time; they are leveraging APIs to make themselves interoperable with many other systems; they encompass both central management and support for library specific holdings; and they are opening themselves up to allow customers to collaboratively contribute and edit the metadata. For example, the KB+, BACON, and ERDB-JP knowledgebases all originated in consortia and contain highly-curated metadata, with provisions for partners to improve any errors they find.

Wilson closed with the observation that knowledgebase metadata seems to naturally lend itself to being maintained at multiple levels. For example, there could be global data on publishers, packages and standard license terms, national or consortia-level data on shared packages and licenses, and local data on institution-specific holdings, pricing and negotiated license terms. Doing so would move these systems toward the infinitely flexible, all-encompassing and “self-sustaining” global knowledgebase envisioned by Ross Singer.

Managing Content in EBSCO Discovery Services: Action Guide for Surviving and Thriving
Regina Koury, Idaho State University Library
Charissa Brammer, Idaho State University

Reported by: Emily Ray

Regina Koury, from Idaho State University, spoke about her experiences with EBSCO Discovery Services (EDS). (Her presentation partner, Charissa Bremer, could not attend the conference.) Koury began by outlining the size of Idaho State University (14,371 students and thirty-nine faculty and staff in the library) and the transitions of her department’s name from Technical Services to Content Management to Resource Discovery Services.

Most of the session addressed her library’s experience with EDS and specific issues they resolved. E-book records from their Voyager catalog were not loading to EDS; records from EBSCO collections were able to be loaded. However, EBSCO collections’ records either displayed no concurrent user information, or the concurrent user information appeared too low at the bottom of the page for patrons to notice it. Working with EBSCO support, they set up filters to prevent loading records into EDS when the 856 field contained “Netlibrary,” 049 contained “N $ T”, and 938 contained “EBSCO”. With the filters in place, the Library’s catalog records for EBSCO e-books loaded into EDS. This process took about two weeks.

Other issues discussed included that “bound-with” bibliographic records appeared in EDS with only the first title visible to patrons. They hope for better title discovery in the future. There were also some issues with a few databases. For example, widgets for Ovid and Natural Medicine did not appear in EDS, so they decided to load MARC records for these resources into EDS. They considered a similar process for Clinical Key, but the content is now available in EDS. Following a request from public services librarians, videos were removed from their EDS indexing and were no longer visible to patrons.
In addition to outlining the issues and workflows to resolve issues in EDS, Koury discussed attitudes towards EDS and discovery tools in general among public service and technical services librarians. Since implementation of EDS, library staff are more in favor of discovery tools.

Koury listed ways to contact EBSCO to receive information from them, including the EDS content newsletter, the EDS partner listserv, the EDS blog, and the EDS wiki (which requires a log in). For customer service, she was happy with the engineering team, but lately there have been some issues with general support. She was optimistic; however, and hoped that her recent issues were due to changing roles and will improve. She reported that her institution prefers EBSCO’s LinkSource and EDS over SFX and Primo.

In answering questions, Koury detailed how the Library uses a Google Form ticketing system that is sent to several individual emails for troubleshooting. They have not yet started weeding e-books from their catalog or from EDS. Koury noted that content must be deleted in three places to remove it fully from EDS. For Open Access content, they loaded Project Gutenberg titles, but there were so many updates they deactivated this service. For Directory of Open Access Journals (DOAJ), there have been some problems, but they are retaining those journal titles in EDS.

Master of “Complex and Ambiguous Phenomena”: The Electronic Resource Librarian’s Role in Library Service Platform Migrations

Conor Cote, Montana Tech of the University of Montana
Kirsten Ostegaard, Montana State University

Reported by: Sanjeet Mann

When Conor Cote and Kirsten Ostegaard polled the audience at the beginning of their NASIG session, nearly everyone in the room was either contemplating a library service platform (LSP) migration or had recently completed one, and many were migrating as part of a consortium. System migrations are disruptive for any single library; one audience member likened the experience to changing the wing of an airplane while flying it. Libraries that choose to migrate as a consortium face added complexity, and typically their electronic resource librarians (ERLs) are caught in the middle. At this session, Cote and Ostegaard used the NASIG Core Competencies of Electronic Resources Librarianship to explain how their consortial migration has affected their work; and facilitated discussion with audience members on the communication, project management, and time management strategies needed to achieve a successful migration.

TRAILS, a diverse consortium of Montana academic, special, and tribal college libraries, includes Montana Tech (a 2,500 FTE engineering and science campus in Butte within the University of Montana where Cote works as electronic resource librarian) and Montana State University (a 15,000 FTE land grant university in Bozeman where Ostegaard is electronic resources and discovery librarian). The consortium recently chose Alma as its new LSP, concluding contract negotiations in May 2016 and committing all members to undertake a migration before their existing ILS contracts expired.

To manage the migration, the consortium set up three groups of project teams: “functional teams” composed of experts from various libraries in five areas such as “discovery” or “e-resources”; a “core team” containing the leaders of each functional team (and a few others); and primary contacts from each library in TRAILS (usually the director). Teams used Basecamp to manage key documents, and communicated via email and recorded webinars. Cote used OneDrive for Business to share documents and archived key emails in a shared OneNote notebook. He also served as Montana Tech’s primary liaison with Ex Libris, with responsibility for submitting support tickets on behalf of all departments in the library. Cote and Ostegaard both cited time management as a challenge; they negotiated reduced workloads and wrapped up competing projects in order to focus on the migration. Audience members from other consortia undertaking LSP migrations reported similar experiences.

Research literature shows that LSP migrations require buy-in from every department in a library; consortial
migrations also require trusted relationships between institutions and the leveraging of shared experience and resources. E-resource and systems librarians are disproportionately affected; one recent study estimated that they fielded a quarter of the problems that arose during the migration. Ostegaard and Cote examined how each of the seven Core Competencies can help an ERL participate in a system migration:

1. **Life Cycle.** Tracking resources throughout their life cycle gives the ERL enough familiarity with library operations to be able to serve as a bridge between departments, or between the library and the system vendor.

2. **Technology.** The ERL’s technical knowledge is necessary to orchestrate hardware and software changes, train staff, and communicate with external stakeholders.

3. **Communication.** Once begun, a LSP migration moves with surprising speed. The ERL must keep up with changes and communicate in multiple directions: “up” to management (especially regarding potential problems), “down” to all staff, and “across” to teammates.

4. **Research and Assessment.** Migrations test the ERL’s analytical skills by offering plenty of problems to solve. Audience members shared that the learning curve remains steep for the first year after going live.

5. **Supervision and Management.** ERLs involved in a systems migration may find themselves influencing and managing people over whom they have little formal responsibility. Cote remarked on the need to share a sense of urgency with project teams, while setting realistic deadlines that give them sufficient time to respond. Ostegaard commented on the need to translate policies and redesign workflows to suit the new system.

6. **Trends and Professional Development.** LSPs have a rapid development cycle and continue to add new functionality even as staff are being trained on the system. ERLs can use release notes, listservs, and peer advice to help keep up with the changes.

7. **Personal Qualities.** Cote and Ostegaard highlighted emotional intelligence as a key skill for ERLs involved in a migration. “Leading with respect,” empathizing with anxious staff, and establishing guiding principles for how the migration will benefit end users can help ward off the phenomenon of “emotional hijacking” that might otherwise foment staff resistance.

Libraries in the midst of a LSP migration may be tempted to liken the experience to that of navigating an obstacle-ridden skijoring course, as one audience member did when Ostegaard included a slide on this popular Montana pastime (where a person on skis is pulled by a horse). However arduous the process, Cote and Ostegaard concluded that ERLs are well positioned to help pull their libraries through, as long as they act with respect, stay goal oriented, and communicate transparently.

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**Open Access in the World of Scholarly Journals: Creation and Discovery**

*Sandra Cowan, University of Lethbridge*

*Chris Bulock, California State University Northridge*

Reported by: Shona Toma

Sandra Cowan and Chris Bulock brought together issues faced when advocating for the creation of Open Access (OA) content, and the discovery and access issues posed by OA content in hybrid journals. First, Cowan summarized the current status of OA content. She presented stark figures demonstrating that the current subscription model is unsustainable for libraries. The increasing costs of commercially-published journals are damaging monograph budgets and even impacting the ability to hire new staff. Cowan described how Canadian institutions are seeking to overcome this current crisis. Assessing which journals are absolutely critical has served as useful leverage in negotiations, particularly in breaking down “big deal” journal publication packages. She asserted; however, that the best solution is to diminish the power that commercial publishers have over libraries. Cowan gave a very useful overview of OA policies and initiatives in Canada, including the University of Lethbridge’s Journal Incubator [http://www.journalincubator.org/](http://www.journalincubator.org/). The obstacles and...
incentives for OA publishing were also discussed. Cowan called on librarians to lead by example, advocate for positive OA publishing and policies, and to demonstrate the many benefits of OA to our academic colleagues.

Bulock spoke more specifically about hybrid journals and the many reasons why they are problematic. A hybrid journal gets funding in two ways: it has a subscription fee, and also offers authors the option to pay to make their article OA. Bulock identified reasons why these are a popular choice. Publishing in a hybrid journal satisfies many OA mandates, but publishing in hybrid journals still has the “prestige” element required for promotion and tenure because there are subscription fees associated with these journals. For the library, hybrid journals are a particular challenge to integrate with OpenURL link resolvers and discovery layers. Bulock explained that within a hybrid journal, it is difficult to determine which content is accessible to the library. If the library doesn’t index Open Access articles, the user is probably getting better results via searching Google. The use of NISO Access and License Indicators offer an article level indicator in the metadata; however, Bulock revealed that this is not being used by many publishers of hybrid journals, or if it is being used, it is not implemented correctly. There is a high volume of research published in hybrid journals, particularly in the UK, and therefore content needs to be accurately indexed. Bulock concluded with suggestions for what librarians faced with this challenge can do. These included discussing the issue with your discovery and content providers, and advocating for the proper use of the NISO indicators.

Remain in Safe Mode or Embark on a New Horizon? A Reconsideration of an Academic Library’s Current OpenURL Link Resolver Service

Rachel Erb, Colorado State University Libraries

Reported by: Sanjeet Mann

After nearly thirteen years running Ex Libris SFX link resolver software, Colorado State University (CSU) Libraries decided in early 2015 that it was time for a change. Within the department, organizational restructuring and staff reductions had combined to leave the electronic resource management librarian, Rachel Erb, with only one staff member to assist with e-resource management, even as Erb’s role shifted away from troubleshooting and knowledgebase management toward licensing and vendor negotiations. Outside the department, the vendor marketplace for link resolvers had changed considerably, and the CSU library system was looking to integrate operations across its three campuses. Conditions were ripe for change; however, as Erb shared in this NASIG session. The process led her and her colleagues in a direction they could not have predicted.

The search began in March 2015, when library deans created a committee to identify the pros and cons of alternative link resolvers, gather price quotes, recommend the best system, and propose workflow recommendations and an implementation timeline. Erb chaired the committee, which also included representatives from library systems, academic computing, and a subject librarian. They had only six months to complete their work, so they tracked milestones using Only Office project management software.

After brainstorming a list of ideal features, the team drew up a short list of four OpenURL providers (including Ex Libris) and compiled a forty-five question Request for Information (RFI). Vendors were asked to comment on their capacity to provide training and technical support, compliance with industry standards, MARC record and usage reporting functionality, customizability of the public interface, product development goals, and overall cost. Erb sent the RFI to vendor contacts and answered countless follow up questions. Vendor responses took over three months to arrive and were tracked in a spreadsheet.

Three of the four vendors looked promising, so the team scheduled them to give ninety-minute product demonstrations and invited the whole library. A brief three-question survey collected feedback from library staff who attended the demos. These meetings helped the project team identify a preferred finalist.
At this point, the unexpected happened: library leadership revisited the work of two dormant task forces that had been researching next-generation ILS and discovery services, and decided to migrate to Ex Libris Alma and Primo. Erb had served on both task forces and recognized that the Ex Libris products would meet those needs; however, the decision also obliged the e-resource department to stay with SFX as the link resolver of the future.

The migration project expanded to include other library departments, now that it was an ILS migration instead of an OpenURL migration. The core project team began holding twice-weekly meetings, produced monthly reports for library management, and convened monthly meetings for all library staff. Documents were shared through OneDrive and project materials distributed through Basecamp.

Implementation proceeded in three stages, beginning with a planning and data cleanup phase scheduled to last through July 2016. Staff scoured the Ex Libris documentation for ideas when they realized that ERM and order records in the existing Innovative Millennium system could not be easily imported into Alma. They converted records to XML where possible, and developed a creative workaround involving Create Lists and spreadsheets to address records that could not be converted. They are also working with campus IT staff to replace the library’s expiring MetaLib subscription with an easier way for patrons to access subscription databases.

Ex Libris staff will take the lead in the second implementation phase, scheduled to occur before December 2016. This phase includes configuration of system options, the actual transfer of data to Alma, and going live with the new systems. The entire year of 2017 has been dedicated to post-implementation work. This phase will likely entail extensive troubleshooting, data cleanup, and further system configuration.

While CSU Libraries’ e-resource department is still using the same system under which they had begun their investigations, the outcome can hardly be considered a regression to “safe mode.” Researching OpenURL systems taught Erb and her colleagues a lot about the systems marketplace and helped them gain a holistic approach to library systems integration. Since changes in any one system ripple across other systems, Erb recommended that libraries interested in replacing their OpenURL resolver should instead broaden their view to reconsider their entire ILS. Erb closed by encouraging audience members contemplating the new horizons offered by a replacement ILS to “expect the unexpected” and stay nimble throughout their journey.

**Shaping Expectations: Defining and Refining the Role of Technical Services in New Resource Rollouts**

*Jeff Mortimore, Georgia Southern University*
*Debra Skinner, Georgia Southern University*

Reported by: Linda Smith Griffin

Mortimore and Skinner presented on how the technical services department at their library has taken an active and front-facing role in improving public communication strategies and promoting new and existing resource rollouts to the library and university community. The presenters noted that prior to the creation of the “New Resource Rollouts Protocol,” the library’s messaging was inconsistent and contributed to a series of internal problems between technical and public services, and external issues between the library and patrons. Additionally, the presenters noted that technical services are well-suited to lead communication activities because communication begins at the point of acquisition and setup. Knowledge and familiarity with resources enables technical services librarians to provide consistent messaging for liaison librarians. In turn, faculty will be better positioned to promote the new resources and increase student buy-in and use. Attendees were given copies of the protocol that contained a detailed communications timeline and a copy of a rollout template that highlighted the entire messaging process.

The protocol is conducted in three stages and requires coordination between technical and public services.
The first stage, Trial and Adoption, is the beta period where most configuration work is conducted to ensure that the resource is functional. This occurs two weeks prior to the first go-live announcement. It is during this trial period that the resource is activated and can be discovered before the actual go-live date.

The second stage, Go-Live Announcement and Go-Live Two Week Notice, is the actual launching of the product. Final testing and support materials are created for the resource. Liaisons are notified that the new or existing resource will be promoted to the public in two weeks. At this stage the focus is on giving the liaisons time to become familiar with the resource prior to promoting it to the public. Specifically, liaisons are given time to train, test, submit corrections, and request additional support. A week before the product is launched, several documents are drafted including the external FAQ post; a faculty read-copy of talking points in language liaisons can use to communicate about the resources with faculty; the blog announcement; and the faculty announcement regarding liaison training. The internal FAQ is also finalized and released and a liaisons go-live reminder is sent.

Stage three focuses on the public release and includes an official go-live date. This stage includes revision of the internal FAQ post; finalization and release of the external FAQ, faculty read-copy, blog announcement, faculty announcement; and the beginning of liaison training. Public promotion and support begins. Liaisons and the promotion committee take over.

At the conclusion of the session, the presenters shared the impact, lessons learned, and future directions. It was noted that the new resource rollouts protocol has improved the relationship between technical and public services and it is contributing to a unified customer experience that clearly shows technical services is public service. The next steps will include looking at cancellations (rollbacks), publicizing FAQs, increasing public services’ support autonomy, and expanding assessment. Since the protocol’s implementation, there have been thirty-three new resource rollouts. The success of this technical services initiative has merit for the University System of Georgia Libraries.

Show Me the Value!

Matthew Harrington, North Carolina State University

Reported by: John Kimbrough

What is your serial ROI? In recent years many librarians have asked, or been asked, to measure return on investment (ROI) for their serial subscription purchases. Consortial arrangements introduce additional complexity for ROI assessment, as both journal package costs and ROI data may be spread across multiple libraries. For the past few years, Matthew Harrington has developed and maintained a Microsoft Access database to measure ROI for the Triangle Library Research Network (TRLN), a consortium of four libraries including North Carolina State University (NCSU).

Harrington chose to work in Microsoft Access for its easily understood graphical user interface and its ability to handle multi-dimensional data (e.g., from multiple libraries, in multiple years, and/or drawing from multiple sources). The goal was to produce a tool that would show metrics for a given journal package. Collections librarians and other users could define their own standard of value (e.g., a certain cost per use) and use the ROI database for queries such as: Does a package meet this standard? How has the package performed in the past? Would we get a better score with a different mix of titles?

The ROI database includes a variety of data: title prices, package costs, usage data, bibliographic metadata, coverage dates, and impact factors. Working with multiple libraries and multiple branches makes data collection especially challenging. Harrington used a combination of linking ISSN (ISSN-L) (http://www.issn.org/understanding-the-issn/assignment-rules/the-issn-l-for-publications-on-multiple-media/), institution, and year to uniquely identify data, but “linking data is never a straightforward process,” he noted.
TRLN currently uses the ROI database for two packages: Springer and Wiley. Springer is a “true shared collection” in TRLN, with a single package and cost shared among consortium members. Wiley holdings are more complex; each TRLN member has their own set of Wiley journals, often a combination of a Wiley package and individual subscriptions. These different journal title mixes made for 1,500 titles and 24,000 subscriptions over the six years of available data.

Harrington used a demonstration version of the ROI database to show several possible views of a package’s data. A “TRLN view” displays consortium-wide pricing, savings over list price, total usage, cost per use, and titles falling outside the Wiley collection package. Each member can display its own annual data at the branch level, and institutions can compare data with other members, such as overlap analysis, cost per title, or cost per use. Individual titles can also be selected and subscription information can be displayed, along with impact factor and usage. The database also includes subject-level views of cost data based on LC class. Librarians can set limits, such as a minimum number of uses per year or maximum cost per use, and the database will display the number of journals that meet the limit.

In the future Harrington hopes to automate additional features, such as automatic data integrity checks (e.g., titles with no list price) and easier ingestion of annually produced data, such as COUNTER reports. During the Q&A session, current and former members of the TRLN collections committee, the primary user group of Harrington’s ROI database, noted the tool had been very helpful for evaluating journals and determining savings of package deals over individual subscriptions.

Text Mining 101: What You Should Know

Ethan Pullman, Carnegie Mellon University
Denise Novak, Carnegie Mellon University
Kristen Garlock, ITHAKA.org
Patricia Cleary, Springer Nature

Reported by: Marcella Lesher

As promised by the title of their presentation, the speakers provided a comprehensive overview of text mining and how it impacts and provides opportunities to libraries, library service providers, publishers, and, most importantly, researchers. Novak of Carnegie Mellon started the program off by defining text mining as “the automated processing of large amounts of structured digital texts” which enables researchers to analyze and interpret massive amounts of textual data, an impossibility using traditional retrieval methods. Pullman, also of Carnegie Mellon, highlighted examples of text mining projects that use word clouds built from mining large texts, including a class project looking at case documents in the Authors Guild v. Google copyright infringement case, and a Carnegie Mellon and Georgetown University joint project called the Six Degrees of Francis Bacon (http://www.sixdegreesoffrancisbacon.com/). This project has allowed researchers to trace the “social connections” between individuals during the time period of Bacon’s life.

Pullman described how text mining challenges the traditional roles of library liaisons by going beyond the task of acquiring texts and providing access to them. He noted that “Librarians need to understand how texts are used in the digital age, what tools are available, and what issues impact their acquisition and access.”

Pullman posed the question of how a librarian can stay informed in order to bring these new tools and methods to faculty and student patrons. He remains informed by reviewing faculty curriculum vitae, publications, syllabi, and research showcases. In general, participation in the research and scholarly communication life of faculty and students is critical.

Novak discussed the acquisition factors associated with
text mining. Acquiring text mining services requires knowledge of who will allow text mining, cost information, and licensing that will permit text mining to take place. At Carnegie Mellon users are presented with library guidance that describes text and data opportunities as well as links to free sources that allow text and data mining (http://www.library.cmu.edu/research/tdm/overview).

Support of text mining of the JSTOR digital library was discussed by Kristen Garlock. She presented information on JSTOR’s free Data for Research service (http://about.jstor.org/service/data-for-research) which is “a self-service website for generating datasets from the content on JSTOR.” This type of service provides both opportunities and challenges for the organization. Opportunities include development and promotion of new types of scholarship, new partnerships, increased use of publications as scholarly tools, and increased recognition of influential articles. Challenges include staffing and support, keeping up with research trends, and the increasing number of requests for larger and more complex data sets.

Cleary, from Springer Nature, described the publishing side of text mining. She noted that Springer Nature will very shortly be updating their text and data mining (TDM) policy. As noted on her slide presentation, “Springer grants text and data mining rights to subscribed content, providing the purpose is noncommercial research.” Individual researchers can download content directly from the SpringerLink platform without going through a registration process. Future SpringerLink subscription agreements and renewals will include a TDM clause; those holding current agreements may also add the TDM clause to take advantage of TDM now. Cleary provided some technical guidance to downloading content, indicating that the CrossRef TDM initiative may be useful. Springer Nature also provides a free metadata API that allows for searching Springer content.

To Lead to Learning, Not to Madness: E-Books & E-Serials at the Library of Congress
Dr. Theron Westervelt, Library of Congress

Reported by: Jamie Carlstone

Dr. Theron Westervelt, a supervisor at the Library of Congress (LC) discussed the implementation of a system for e-book and e-journal deposit at LC. Westervelt’s presentation discussed the challenges and benefits to electronic deposit for both e-journals and e-books, and focused on how LC uses its established relationships with publishers to broaden collections to include digital files. The challenges are particularly great at LC, where the mission is to create a rich and diverse collection for the American people. LC has done this successfully in the past with print; however, there is nothing in the mission statement that says, “Forget the digital stuff.” Collecting intellectual content is key, regardless of format.

In 2004, there were about 150,000 e-books in the LC’s collection. In 2013, there were over 900,000. Each year, the e-book and e-journal collections are increasing. In 2004, over 15% of the serials that began that year had an online version. By 2013, this had increased to 40%. By 2013, nearly 30% of serials were available as online only. To ensure the deposit of online resources, LC took advantage of processes that were already in place for print acquisition, and created Copyright Mandatory Deposit (electronic deposit for serials) and the Cataloging in Publication (CIP) program for e-books. Essentially, LC is using the same relationships that were there for building print collections, and applying them to build electronic collections.

Mandatory deposit requires anyone who publishes or widely distributes creative work in the United States to send two best copies to the Library of Congress. This has been an integral way LC has built its collections since the late nineteenth century. In the late 1980s, when creative output began on the World Wide Web, an exemption to the deposit law was written for non-print materials. In the 1980s this exception made
sense, as the future of the web was uncertain. In February of 2010, LC made an exception to the exception beginning with e-serials that were published online. Now, mandatory deposit must be made for e-journals that are published online only. LC is now in the process of changing that exception to extend to e-books and digital sound recordings, and hopes to have that written into the regulation by the end of the year. By the end of 2017, LC will receive books and music that are only digitally distributed.

The Cataloging in Publication program (CIP) at LC is used to deposit e-books. This program has been in place for four years and is an agreement between LC and publishers. Publishers send LC galley copies, LC does as much cataloging as possible, and then publishers use the cataloging metadata for publication. LC decided to create the metadata and take advantage of the already existing CIP relationships to build the e-book collection. The publishers were very interested, and nearly two hundred publishers signed up for the program. About 4000 e-books have been acquired this way.

One of the main challenges of digital deposit is file formats. LC has received eight-seven different file extension types, which presents many challenges for file management in the digital life cycle. LC invested in Signiant Media Exchange, which handles file uploads, metadata, and provides a landing space on the Library’s side of the workflow. LC also uses Delivery Management Services, which handles digital files like they are print material, thus making acquisitions workflow easier. LC also developed recommended format statements because it has to consider the digital life cycle and the potential future costs of managing obsolete formats.

The program will expand in the future to include foreign publishers. LC is still in the early days of this process and is still figuring out how to navigate the many challenges of the program. However, these challenges are faced by everybody: libraries, authors, and publishers; and everybody has a common interest in ensuring there is a model that allows for the creation, distribution, preservation, and access of creative work.

Using Course Syllabi to Develop Collections and Assess Library Service Integration
Ria Lukes, Indiana University Kokomo
Angie Thorpe, Indiana University Kokomo

Reported by: Melanie J. Church

Ria Lukes and Angie Thorpe began their presentation with a statement that it was based on practical research intended to make them better at the job of collection development and noted that they are not part of a bigger collection development team. They were already using course lists and degree requirements, faculty and student requests, their own judgment, and gaps within the collection to perform collection development, but they wanted a more precise method for assessing the gaps. They decided to approach this by examining course syllabi to assess what the gaps were in library holdings of required and recommended resources.

At Indiana University Kokomo, faculty are required to submit their syllabi to departmental secretaries, which made it possible for Lukes and Thorpe to collect a significant number of them at one time. After standardizing the resource lists gleaned from the syllabi and assessing the data, Lukes and Thorpe found that books were the most commonly mentioned resource type, but databases, media, periodicals, and legal cases also appeared frequently enough to warrant assessment.

Assessment included looking at library holdings and usage. In determining whether or not the library provided access to the books listed on the syllabi, one factor that needed to be accounted for was the library’s policy to not purchase textbooks. As many of the books listed on syllabi are textbooks; the high number of titles that the library did not provide access to (87%) is not as problematic as it would be if they collected textbooks.

The range of media listed on syllabi, which included PBS videos, YouTube, C-Span, and Rotten Tomatoes, made the number that the library did not provide access to fairly high (79%). In analyzing usage, Lukes and Thorpe noted that print journals, e-journals, and e-books that
were mentioned on syllabi didn’t have significantly higher usage than other titles in the same formats.

In addition to the resources listed, Lukes and Thorpe noted a number of surprising things in some of the syllabi. Specifically, none of the faculty sent students to any streaming video available from the library. They also found outdated language prohibiting the use of “Internet” resources. Some suggestions faculty had for how to do research in Google were troubling and the library was infrequently mentioned as a place for research. More frequently, it was described as a place to get a laptop, a place to study, or the location of tutoring and other services. Lukes and Thorpe also learned of a twenty-five-page research-intensive paper that was not reflected in any of their reference transactions.

Based on their analysis, Lukes and Thorpe have made some plans for next steps to improve collections and services. They intend to do outreach to individual faculty, use known assignments to develop library courses to embed in the learning management system, and identify underutilized online resources to make decisions to either cancel or promote them. Some final thoughts Lukes and Thorpe wanted to share were largely about project planning. They advised attendees to invite buy-in before beginning, prioritize, and define who’s leading the project along with the goals and boundaries. They also encouraged people who are looking at doing this type of project not to lose track of what their dream goals are.

When there is No Magic Bullet: An Interlocking Approach of Managing E-Books

Xiaoyan Song, North Carolina State University Libraries

Reported by: Shannon Regan

Xiaoyan Song’s presentation detailed the challenges for managing e-books and e-book packages. Using the metaphor of Legos, the talk started by looking at how different systems, workflows, and individuals contribute to building a dependable process for the acquisition, access, and management of e-books. By reviewing the existing e-resources acquisition workflow and the systems used to manage this workflow, the team at NC State identified needs that were not met by the current process. Song described that their approach of using a knowledgebase, traditional ILS, discovery system, and ERMS left gaps in their ability to manage licenses, title lists, administrative information, requests from collection management, and access. NC State implemented the following new tools to address many of these gaps:

- CORAL, to manage e-book acquisition workflows;
- An internal wiki site (an e-resource hub) to capture all administrative information about e-book packages;
- An e-book reconciliation database built in MS Access to provide title list support.

Song ended the talk with some suggestions for those looking to improve upon the management of e-books. Suggestions included evaluating existing systems for what they can and cannot do, focusing on needs not met, and exploring other solutions to address those needs.
Profile of Anna Creech, NASIG President
Christian Burris, Profiles Editor

I’m Christian Burris, and I serve as a member-at-large for NASIG as well as the profiles editor for the NASIG Newsletter. It was my pleasure to interview Anna Creech, who is the president of NASIG for 2016-2017.

Anna earned her B.A. in Mathematics from Eastern Mennonite University and her M.S. in Library and Information Sciences from the University of Kentucky. Currently, she is the head of resource acquisition and delivery for the Boatwright Memorial Library at the University of Richmond. She took over the gavel from Carol Ann Borchert at the close of the 31st Annual Conference in Albuquerque in June 2016.

My interview with Anna was conducted by e-mail in early August.

Who or what drew you to NASIG initially?

My first professional position after graduate school was as a serials cataloger. I had minimal experience with cataloging, though I had worked with serials to some extent in previous jobs. My supervisor gave me some manuals to get started, and also suggested I attend the NASIG conference, specifically because there was a pre-conference on serials cataloging.

When did you decide to become a librarian?

When I decided I would be a terrible high school math teacher. It was right after my sophomore year of college, and I had just finished a three-week practicum at a local high school. I was already questioning whether I should continue with the secondary education degree, and that experience sealed it for me. I had been working in the college library since my first year, and I had been a big fan of libraries all my life. As I assessed my options, it seemed like this was the next best career choice to make. I finished up the mathematics degree sans secondary education, and got a job at another university library to give myself a few years of breathing room before I then plunged into graduate school full-time.

What has been your greatest reward as a librarian?

I don’t think I have a good answer for this. It just feels like the right thing for me to be doing. I think having a purpose in life is rewarding, but perhaps not the greatest reward.

What drew you to academic libraries?

I loved college and never wanted to leave it. This was my cheat to stay in higher education without having to pay for it. I briefly considered special libraries, but I didn’t want to do reference/research work, and I figured the competition for NPR jobs would be really stiff.
How did you arrive at the University of Richmond?

Rachel Frick joined Jeff Slagell and me at the hotel bar in Louisville before the NASIG conference [in 2007], and she told me about the electronic resources librarian position she had created at the University of Richmond. I was ready to move on to a new place, and I wanted to get back to the mid-Atlantic area, or at least somewhere within driving distance of my family in Ohio. I applied for the position, got an interview, and apparently they liked me well enough. NASIG has been partially responsible for every job I’ve received since I joined.

How did you get started as host at WRIR-LP?

They were tabling at an event I attended within my first year of moving to Richmond, and that’s how I first heard about them. I had been involved with two college radio stations some years before, and I missed doing radio. I applied to be a DJ, went through the training process, and landed my first show from 3am-6am on Sunday mornings. I moved around the late night slots until finally a morning show opened up. I’ve been the “Monday Morning Breakfast Blend” host for the past two years now, and the Rock/AAA music director for the past three years. The latter is my application of library/organizational skills to the disorganization of the radio station’s music collection.

What’s currently on your playlist?

Tegan & Sarah, Love You to Death
Sleater-Kinney, No Cities to Love
Missy Higgins, The Ol’ Razzle Dazzle
Tycho, Awake
Worriers, Imaginary Life
Erin McKeown, According to Us
Kiya Heartwood, Palo Duro
Lucius, Good Grief
Lucy Dacus, No Burden
…and a bunch more. I know I’ve probably forgotten something I’d want to share.

I know that you’ve been to Dragon Con several times. What’s your favorite thing about geek culture?

For Dragon Con specifically, it’s the cosplay. People really go all-out in their costumes. My favorites are the ones that color outside of the lines. The first year I went, it was all zombie versions of standard characters, and the next year it was steampunk variations. I was really impressed with a woman who knit a full-body costume of the hat that Jayne wore in Firefly. That’s a very specific kind of fandom. I could never think of a character that I was that fond of or obsessed with to dress up like them, and to be honest, having no crafting skills was a bit of a setback. However, one year I decided to dress as Michael Porter’s Libraryman character, and that was rather fun.

Who are you currently reading?

Matt Wallace is writing a series of novellas about a catering company for the supernatural community. His irreverent humor reminds me of Christopher Moore, and the books move at a good pace.
What are your priorities/goals as the president of NASIG?

Many of the things I wanted to do when I ran for president a few years ago have already been or are in the process of being implemented, so I’ve had to think a bit about this. Recent presidents and boards have done quite a bit to shift us in the direction of focusing on creating content for the profession, and I plan to support and move forward those initiatives. I also want NASIG to be more visible in the places where it should be an obvious choice for partnerships. Mainly, I think we have a lot of good things going on right now that need to keep rolling.

Would you like to share anything else with us?

It may come as a surprise to some, but I’m actually a shy person. I’ve just learned how to fake it well enough.

Profile of Nettie Lagace, Associate Director for Programs at NISO
Christian Burris, Profiles Editor

Nettie Lagace is the associate director for programs at NISO (National Information Standards Organization). She earned her B.A. in Political Science and History at Wellesley College and her M.I.L.S. at the University of Michigan. Before arriving at NISO, she was the business information librarian and webmaster at the Baker Library for Harvard Business School as well as a project librarian, project manager, and project director at Ex Libris.

When did you decide to become a librarian?

I graduated from my liberal arts college smack into a recession, and felt fortunate to land a regular job as a secretary in a very small law firm. Because it was so small, I became the “gofer” who would go to regional libraries and town offices to do research on historical matters and records lookup for the partners. I found I liked the process of finding various things (much more than doing my research for papers in college!) and the thought of becoming a person who organized materials for future access seemed quite appealing. So I went back to my college library (I lived nearby) to look up library schools in order to get a degree...this was in the early 90s when many of them were closing. Through fate, I made it to the University of Michigan’s School of
Information and Library Studies as it was planning its eventual transition to the School of Information and my first semester was when version one of the Mosaic web browser was released. It was a very interesting time to be in library school. My fellow students there, who were all so bright, energetic, and perceptive, made the difference for me.

Were there any challenges as you transitioned from libraries into the role of a supporting partner for libraries?

Not so many, for me. Again, when I moved from working in a library to working for a vendor (Ex Libris in 2000), timing was on my side: the link resolver technology was so very new that it was fun to be able to discuss how it worked with potential customers and partners. Nowadays we can take interoperability for granted all we want; but then, connecting two disparate pieces of technology (abstracting and indexing databases and online journals) seemed like a wonder! The fast pace made me learn as quickly as possible and I appreciated that my understanding of the issues that libraries faced helped me communicate their product needs to our development process. I tried to make the most of that experience.

How did you become involved with NISO?

NISO was a crucial part of the standardization of OpenURL (ANSI/NISO Z39.88-2004 (R2010) The OpenURL Framework for Context-Sensitive Services), the technology that link resolvers are based on, and to this day OpenURL is my favorite standard, of course! So I understood the importance of standards very early in my library technology career. I began representing Ex Libris as a member of the NISO Education Committee (a group that helps NISO staff plan webinars and other events) and soon after that I served as Ex Libris’ voting representative to NISO. These tasks helped me understand the role that NISO plays in connecting different stakeholders to create tools that help “grease wheels” for everyone and how full, open input on standards during their creation and maintenance is necessary to cultivate the richest development environment possible. Moving to work at NISO when I did in 2011 seemed like a pretty natural transition for me!

You’re the associate director for programs at NISO. Could you share more about what you do in this position?

NISO has a very small staff so we all do a bit of everything, but my main role is to manage the working groups and our leadership groups (called “topic committees” at NISO). These are made up of volunteers from the different communities NISO serves: libraries, vendors, publishers, and others. Every group and project is different – different problems, different context and outcomes, different personalities – which ensures that I’m learning something new every day. I ensure that NISO’s standards are updated and maintained, and work with ANSI, the American National Standards Institute, our accrediting agency, to follow our approved procedures. I also work with NISO executive director Todd Carpenter and my fellow staff members on strategic initiatives to ensure that NISO stays relevant in the community, and we represent the United States TAG (Technical Advisory Group) at the Annual ISO TC46 Information and Documentation Meeting, which is an additional set of international standards in which to be immersed.

Are you watching any specific emerging technologies?

It seems like everyone is moving to social media… but as an easily distracted multi-tasker, I’m not sure how I feel about it personally! Mobile technology can always be improved; now that I use reading glasses I can see that accessibility technology really is for everyone.

What is the next challenge for technology in libraries?

Company mergers—the library world is not immune to this trend across industries.
Would you like to share anything else with us?

I’m always honored to work with the folks at NASIG – at an IFLA (International Federation of Library Associations and Institutions) satellite meeting last week, a librarian approached me to recall a presentation I made at the 2002 NASIG meeting in Williamsburg, VA – I thought I was the only one who remembered it! NASIG has been a great organization for so long and I know NASIG’s collegiality and professionalism will continue to underpin its success.

Columns

Checking In
Kurt Blythe, Column Editor

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

NASIG continues to be super popular, as evidenced by the worthies you’ll find below. Please help me in welcoming our new members:

Maria Aghazarian is the digital resources and scholarly communications specialist at Swarthmore College in Swarthmore, Pennsylvania:

I wanted work experience before I started library school, and I found myself falling into serials librarianship. I started at Swarthmore as the serials and e-resources specialist, where I mostly managed print continuations and standing orders and assisted with e-resources. My responsibilities expanded as I was eager to learn more, and my introduction to NASIG came through the Fritz Schwartz Serials Education Scholarship and the privilege to attend the 31st Annual Conference. The conference was incredible because not only did I learn a lot, but I learned a lot that I could directly apply to my work. In particular, it was a fantastic opportunity to connect with others on issues of open access. It’s pretty amazing to see the wide array of work covered by NASIG attendees, and to see that it’s not unusual for serials librarians to be working with/in scholarly communications.

Rachel Becker, previously the serials acquisitions assistant at the Wisconsin Historical Society, now the electronic/continuing resources librarian at the University of Wisconsin – Parkside, writes:

My career in libraries has been varied from public to archives to academic and finally electronic resources. While in library school, I accepted a position at the Wisconsin Historical Society working in the serials department helping to manage a large collection of print journals and newspapers. I found the work both fascinating and challenging. After graduating, I decided I wanted a position where I could use the skills I had learned in this position as well as gain new ones in the academic library world. My current position is a delightful mix of electronic resources management, collection development, copyright advising, and research help. I became involved with NASIG after I was awarded the 2016 Horizon Award and enjoyed attending my first conference. I look forward to many more years as a NASIG member!

Lisa Gonzalez writes:

I first became involved with NASIG when I attended the conference for the first time in order to give a presentation on institutional repositories and metadata about journal articles. NASIG seemed like the best venue for this topic, and I was pleased with the response to my topic and the overall quality and relevancy of the conference to my work as an electronic resources librarian in a theological library. My interest in the conference was sparked in the first place because of NASIG’s work to produce the document Competencies for Electronic Resources Librarians. The competencies do a very good job of
outlining the scope of work that many e-resource librarians perform, and I found the document to be very helpful as I planned my own professional development.

Besides studying ways to improve electronic resource management, I am also interested in exploring how libraries can make better use of data to improve acquisitions decisions and make the best use of library budgets. I am also passionate about supporting open access in scholarly communication and would like to see more systematic investment of time and money by libraries to develop and support open access projects. Currently, I am the knowledge base and license manager librarian with the PALNI (Private Academic Library Network of Indiana) consortium. My job focuses on supporting librarians in their work to maximize access to electronic resources for their patrons and to improve their libraries’ e-resource workflows. Now that I’m officially a member of NASIG, I plan to explore more of what NASIG has to offer as far as professional development opportunities.

Bethany Greene [ed. note: my colleague!] is very grateful to have been awarded a position as Carolina Academic Library Associate in the E-Resources and Serials Management department at University of North Carolina (UNC)-Chapel Hill.

Since starting the position last fall, I have acquired a much deeper appreciation for serials and feel as if I have truly found my place in the library world. I frequently look to NASIG materials for direction and guidance as I become more familiar with the responsibilities of electronic resource librarians. I am currently a student member of NASIG and hope to attend a conference in the near future.

John Kimbrough writes:

I’m an electronic resources librarian at Georgetown University in Washington, DC. After several years as a reference librarian and other public service positions at Georgetown and the University of Chicago, I recently made the jump to the dark side (or saw the light) in technical services. My new colleagues strongly encouraged me to attend the NASIG conference in Albuquerque, and now I understand why it was on the “must-do” list!

Peter McCracken, at Cornell University:

I’m a returning NASIG member, rather than a new member. Some long-time members will recognize my name in connection with Serials Solutions, which I founded with my brothers and a friend. Serials Solutions introduced me to NASIG and I thoroughly enjoyed participating in, presenting at, and attending conferences from 2002 to 2009, including being on a planning committee for 2003’s conference in Portland. Before starting Serials Solutions, I was a reference librarian at East Carolina University, and then at the University of Washington. In 2009, I founded ShipIndex.org, and with ShipIndex, I attended the 2013 conference in Buffalo, which was not too far from my home in Ithaca, NY, where I’ve lived since 2007. In June 2016, I became electronic resources librarian at Cornell University, and in that role I found it important to re-join NASIG. I look forward to re-engaging with NASIG members and contributing my experiences as a reference librarian, an e-resources management vendor, a database vendor, and now an e-resources librarian.

Then, Nayeli Cortés Rafael, writes:

I am a student from the Escuela Nacional de Biblioteconomía y Archivonomía. I am currently in my ninth semester and am performing my social service in the Lorenzo Boturini Library (Biblioteca Lorenzo Boturini) at The Insigne y Nacional Basilica de Santa Maria de Guadalupe. In this library, I am cataloging serials publications.

I am finishing my studies and have found that in school we are only taught a little about continuing resources. However, throughout my academic training as a librarian I have discovered new trends in the world of serials publications. This why I was interested in seeing the call that came through of the Asociación Mexicana de Bibliotecarios for scholarships to NASIG for Mexican students. It was an opportunity not to miss.

In truth, I do not regret having attended the 31st Annual Conference in Albuquerque, New Mexico, because I was opened to new expectations for my work, and ways of working, and aspects of the daily life of working in continuing resources. Because I am
a few steps away from beginning my professional career, I have enjoyed being a part of the conference. I am now a member of NASIG and look forward to working with serials in the future.

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

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

My visits to the beach are not yet concluded this summer. Lucky me. All of us are in luck given the following reading list though -- plus presentations!


Ed. note: That sounds really cool.


From Katy, “I think most Acquisition Librarians can relate to being called "Accidental."”


This is an overview of new and revised work from the last 2 years.

Betty also presented:

“(Fun and) Games in the Library’s Collection: Cataloging Games for Optimal User Discoverability.” Presented at the Ohio Valley Group of Technical Services Librarians (OVGTS), Louisville, KY, May 26, 2016.


All really cool entries into the scholarship!

Title Changes
Kurt Blythe, Column Editor

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

Please join me in congratulating Selina Lin on her retirement from the University of Iowa after nearly 39 years on the job. Closing out her tenure on April 1 as Iowa’s Continuing Resources Librarian, Selina will be missed from the NASIG rolls.
Summary of Results from the New Student Members Survey, May 2016

In the spring of 2016, the Board asked the Student Outreach Committee (SOC) to conduct a survey of the new student members who took advantage of the free NASIG membership offer to better understand what they wish to gain from a NASIG membership. Members of the SOC collaborated and created a short survey of nine questions. The survey was open from May 17, 2016 to June 3, 2016. Shannon Regan distributed the survey with a cover letter to the list of 400 new student members provided by the Database and Directory Committee. A total of 97 responses were recorded.

Summary of Results

Overwhelmingly, students learned about NASIG via email. Of the membership benefits that most inspired students to join, the majority responded that networking opportunities and discount webinars and educational opportunities were key factors in joining NASIG. The opportunity to network and have access to discounted educational webinars indicates that these are essential roles that students see a professional organization serving.

One question asked students, “What resources do you wish NASIG offered that you do not currently see?” Opportunities for student specific programming, a mentoring program, and student specific participation beyond the scholarships are in particular demand. One respondent commented:

“I am currently trying to publish works that I have completed in the final semester of my Master’s degree, and I have found that some professional organizations have student-focused avenues, allowing student unique opportunities to publish work before moving into the professional world. Perhaps mentoring, or a special submission forum for aspiring authors would encourage greater involvement in scholarly publishing, as well as assistance and a place to display completed work.”

Students were also asked to include where they attend library school and their future line of work. A full report was submitted to the Board in June 2016.

Next Steps and Recommendations

1. Expand opportunities for students to network with NASIG members and learn more about continuing resources management with a mentoring program.

2. Continue to work with the Awards & Recognition and Program Planning Committees to debut Student Snapshot Sessions at the 2017 Conference in Indianapolis, Indiana. This will give students the opportunity to share their research, actively participate in the conference and gain experience public speaking.

3. Build upon NASIG’s strong information sharing and educational programming by continuing to collaborate with the Continuing Education Committee to create a webinar with a student audience in mind. The webinar will introduce students or new members to NASIG as an organization and an overview of continuing resources management.

For this term, SOC plans to focus its energy on the first recommendations; the mentoring program and student snapshot sessions. We have approached the webinar topic with CEC and they are willing to help SOC when we begin to work on the content for a webinar.

Respectfully submitted,
Shannon Regan
July 19, 2016

Student Outreach Members When the Survey was Conducted

Chair: Shannon Regan (New York Public Library), 15/17
Library consultant Marshall Breeding opened the panel discussion by outlining the historical and market contexts of integrated library systems, services platforms, and discovery layers, and addressed a question that represented conversations that were taking place in the industry: whether such systems should be available “bundled” together in a single product, or separately in an “à la carte” fashion.

Beginning with the earliest library automation phase, Breeding showed a historical pattern of consolidation. First generation integrated library systems (ILS) were based around separate functions - specific modules for print management. This changed with the advent of electronic resources. OpenURL link resolvers, implemented through separate knowledgebases, replaced hard-coded links, and electronic resources management (ERM) systems appeared with varying longevity. Breeding argued that some ERMs, such as Ex Libris’ Verde, Serial Solutions’ 360 Resource Manager, Endeavor’s Meridian, and Innovative Interface’s E-Resource Manager, were a less successful genre of automation.

A subsequent movement in discovery centered on improving patron interfaces. Rather than use the native ILS online catalog, separate discovery systems (examples include Endeca’s ProFind, AquaBrowser, and VuFind) proved popular with librarians, though less so with patrons. Breeding highlighted the complexity of synchronizing different front- and back-end systems at the time and how ultimately libraries often reverted to the ILS vendor’s discovery product. Index-based, web-scale discovery layers such as ProQuest’s Summon, Ex Libris’ Primo, the EBSCO Discovery Service, and OCLC’s WorldCat Local/Discovery followed, leveraging knowledgebases that draw on a central index. More recently, there has been a move to a less fragmented model of resource management through bundled library services platforms that support workflows and multiple resource types. These are created by providers of pre-existing index-based discovery services that offer bundled products with an added cost benefit incentive such as, Ex Libris’ Alma, OCLC’s WorldShare Management Service, and ProQuest’s Intota.

Breeding returned to the principle question of his part of the presentation: do index-based discovery and library services platforms need to be bundled together as a single product, or should there be an “à la carte” selection? He proposed the response could be argued both ways: bundling products has the advantage of built-in interoperability between discovery indexes and common knowledgebases, with only a single provider to contact when support is required. Disadvantages...
include potential disconnects between the desired discovery services and back-end management needs, as well as a lack of customization options. For example, one provider may offer superior indexing coverage, or libraries might wish to opt for an open source discovery solution apart from their provider’s product. Breeding also outlined some obstacles to leaving a bundled environment, such as obtaining support for non-integrated systems and pricing or migration incentives that leave libraries feeling obliged to opt for a bundled solution. Current market dynamics display the prevalence of bundled systems in recent academic library platform choices. Ex Libris’ Alma/Primo and OCLC’s WorldShare Management/Discovery are the current dominant services. According to Breeding, ProQuest’s acquisition of Ex Libris means they are well-positioned in the academic and research library market through a consolidated central index.

Neil Block of EBSCO continued the presentation by stating what he considered to be the two big themes in discovery evaluation: choice and quality. Block urged attendees to become familiar with the substantive differences in web-scale discovery systems. Taking the level of trust we place in Google search results as an example, he enumerated the elements for evaluating quality, such as assessing relevancy ranking, metadata, user experience, platform interface and interoperability. He emphasized that there are key differences in the current marketplace to consider. For example, does the quality of metadata in the index and the relevancy ranking permit sophisticated search retrieval, thus driving user experience? Irrespective of the interface, the underlying technology should still return the correct search results and discovery platforms should be interoperable with the varying campus systems such as databases, institutional repositories, existing ILS, and the learning environment. Drawing on his role as Vice President of Discovery Innovation at EBSCO, Block mentioned that EBSCO maintains more than sixty partnerships that enable interoperability.

Using a photo of a traditional purpose-built bedroom dresser as an analogy for the library “all-in-one systems,” Block showed how discovery is currently one constituent part (or drawer), while the original design was to function outside of that system. He argued this is a limiting choice for libraries that was unfortunately driven by marketing rather than technology. He juxtaposed this view with another image of a modern extensible bedroom shelving-storage unit which he likened to the future of discovery with new functionality, such as linked data interoperability, both flexible and adaptable to future trends. Block employed the analogy with a food product: did users want Kraft slices or Gouda cheese? Both represented the same product but with very different experiences and he hoped that libraries would avoid an equivalent experience in discovery.

Robert H. McDonald from Indiana University then presented on the options of buying, building, or leasing discovery platforms in the context of a “dis-integration” between user experience and the management needs of libraries. He discussed how often the work that libraries had originally contributed to the discovery user experience was lost when their provider’s interface proved unsustainable by highlighting the number of products and technologies listed in Breeding’s early slides that were now defunct. Consequently, many libraries in that position have since tried to leverage open source interfaces drawing on search APIs. McDonald provided the context for Indiana University Libraries, currently using the EDS API, and their experience regarding whether to buy, build, or lease. Subscription models mean the university is buying less software outright, and more frequently using “software as a service” or leasing options. When assessing the feasibility of building a product, exploring the open source community was part of the process.

In the context of leasing, McDonald contrasted a traditional loss of lease (and the work involved in moving physical materials) with that of a library system lease. Cloud-based discovery entailed moving data across platforms, a process which is currently a ten-yearly cycle for many libraries. In the same way, contingency plans for backup form the basis of IT directors’ cloud migration strategies. Libraries must likewise be sure of their plan for future migration when
entering into a leasing arrangement and aim for greater agility around back-end management and the speed of such migrations. He continued by arguing for a “dis-integrated” user experience design with control in the hands of institutions. Sometimes this is obtained through open source, but the key element to consider is interoperability. In mentioning the work of 501(c) (3) tax-exempt non-profit organizations for community source software, McDonald concluded with a question: “Where is that fabric of collaborative support in libraries that can sustain some of the open source community?” While not all ventures will need sustenance, libraries will need to build such a fabric for sustainability or embrace current options that may be longer-lived.

Curtis Thacker from Brigham Young University concluded the panel presentation by first asking attendees several questions relating to their satisfaction with - and the performance of - their institutions’ discovery layer. He explained how the library at Brigham Young University decided to build their own discovery platform, first using Primo, and then EBSCO EDS for their central index. He suggested that there were many smaller reasons for doing this, rather than one single one. Taking real search examples, he showed how their discovery layer displayed variant formats of publications, with the simplicity of user experience belying complex back-end work. Accordingly, Thacker believed that hiding complex details from the user is part of the job of making discovery easier.

Then, Thacker discussed open source in general and the commonalities between the Open Source Software (OSS) movement and libraries, such as shared values for open formats and information. Paraphrasing a paper by Kate Moore and Courtney McDonald, he pointed out that open source was only free in the same way that puppies are free, with hidden financial and time costs. To prove his point, Thacker discussed the survey in the ARL Spec Kit [340] he authored, in which 69% of respondents said that although they were in a position to implement an OSS project, they had chosen not to do so, for reasons ranging from time to community support, code quality, and external system dependence. Significantly, Thacker pointed out that over 50% of initiated OSS projects fail, but that none of these aspects were reasons not to invest in OSS projects. He reiterated that the shared values between the open source community and libraries were important reasons we should support OSS platforms. Finally, he suggested that the future of discovery will involve personalization, leveraging usage data for greater relevance ranking, and employing tools building on data mining and machine learning, utilizing already existing technological solutions. Thacker hoped that a combined effort will enable our communities to figure out solutions to current discovery issues.

**Executive Board Meeting Minutes**

**NASIG Board Conference Call**
**March 31, 2016**

**Attendees**

Executive Board:
Carol Ann Borchert, President
Steve Kelley, Past-President
Anna Creech, Vice President/President-Elect
Kelli Getz, Secretary
Beverly Geckle, Treasurer
Michael Hanson, Treasurer-Elect

Members at Large:
Eugenia Beh
Christian Burris
Maria Collins
Laurie Kaplan
Wendy Robertson

Ex Officio:
Kate Moore

Regrets:
Steve Oberg, Member-at-Large
1.0 Welcome (Borchert)

The meeting was called to order at 12:03 pm.

2.0 Treasurer’s Report (Geckle)

2.1 Review of Conference Compensation (Geckle)

The Board reviewed a list of individuals receiving conference compensation to identify any inconsistencies between NASIG policies and actual practice. A&R brought forth an issue regarding whether or not award winners were required to have roommates during the three nights that NASIG covers their hotel room costs.

**VOTE:** All award winners (including student award winners) will not have to have a roommate, and NASIG will pay for the full cost of their hotel rooms for 3 nights. The motion was made by Creech and seconded by Borchert, and the motion passed unanimously.

The award winner compensation information should be passed along to A&R, CPC, and PPC by their respective Board liaisons. Additionally, these committees may need to update their manuals to include this information.

The Board also noticed that the Mexican Student Award is not on the website. Additionally, the Board would like A&R to announce the award winners since an announcement has not yet been made.

**ACTION ITEM:** A&R will coordinate with CMC to include the Mexican Student Award on the Awards page of the NASIG website (Creech & Burris).

**ACTION ITEM:** A&R will send out a message to the NASIG membership announcing the award winners (Creech).

It was decided that much of the compensation information would be maintained by CPC. However, the NASIG website needs to be updated regarding the current compensation information.

3.0 Secretary’s Report (Getz)

**VOTE:** Borchert made a motion to approve the minutes from the March 15 conference call. Burris seconded, and the motion passed unanimously.

Board Activity Report:

- March 4, 2016: Board approves the registration rates for the half-day preconferences in 2016 at $75.
- March 8, 2016: Board approves giving $500 of financial support to the eBooks Festival at Wake Forest.
- March 9, 2016:
  - Board approves the creation of the Fundraising Coordinator position.
  - The Board approved the purchase of 3 physical banners to replace the banners with the old NASIG logo.
- March 11, 2016:
  - The Board approves the Bylaws revisions as presented to the Board on March 8.
  - The Board accepts the revised conference registration cancellation policy, including removal of the $50 processing charge.
- March 15, 2016: The Board elects to become a voting member of NISO for an annual fee of $1,800.
- March 17, 2016: The Board approves the minutes from the conference call on February 22, 2016.

3.1 Action Items Update (Borchert/Getz)

The Board went through the list of outstanding Action Items.

The Board documents have now been moved to a shared Board Google Drive account.
ACTION ITEM: Board members will send their preferred Google Drive account addresses to Getz so that she can add them to the Board’s shared Google Drive account.

VOTE: A motion was made by Burris for to upgrade the Google search box on the NASIG website to an ad-free version for $100. The motion was seconded by Robertson and passed unanimously.

Room Block Discussion (Borchert/Kelley)
Kelley and Creech are verifying that we have enough reserved rooms for the NASIG award winners.

4.0 Committee Updates (All)

- SOC: Nothing to report.
- Site Selection: Site Selection will be meeting next month.
- SCCTF: Nothing to report.
- PPC: Nothing to report.
- N&E: Nothing to report.
- Newsletter: Moore will be sending out the call for the Submissions Editor soon.
- Mentoring: Nothing to report.
- Membership: Nothing to report.
- FPTF: Nothing to report.
- E&A: E&A submitted their mid-year report.
- D&D: Nothing to report.
- CEC: Nothing to report.

(action item continued)

- Proceedings Editors: Kristen Wilson has been named the new Proceedings Editor. Dresselhaus will be taking over as First Production Editor, with Pope serving as the Production Assistant.
- CPC: CPC is investigating potential off-site event spaces for the conference.
- CMC: Nothing to report.
- Bylaws: Nothing to report.
- A&R: Nothing to report.
- Archives Task Force: Nothing to report.
- Archivist: Nothing to report.

ACTION ITEM: Board liaisons need to remind their committees that annual reports are due May 2.

5.0 Adjourn (Borchert)
The meeting was adjourned at 1:04 pm.

Minutes submitted by:
Kelli Getz
Secretary, NASIG Executive Board

NASIG Board Conference Call
April 25, 2016

Attendees

Executive Board:
Carol Ann Borchert, President
Steve Kelley, Past-President
Anna Creech, Vice President/President-Elect
Kelli Getz, Secretary
Beverly Geckle, Treasurer
Michael Hanson, Treasurer-Elect

Members at Large:
Eugenia Beh
Christian Burris
Laurie Kaplan  
Steve Oberg  
Wendy Robertson  

Guests:  
Betsy Appleton, Incoming Member-at-Large  
Chris Bulock, Incoming Member-at-Large  
Angela Dresselhaus, Incoming Member-at-Large  
Adolfo Tarango, Incoming Member-at-Large  

Regrets:  
Maria Collins, Member-at-Large  
Kate Moore, Newsletter Editor  

1.0 Welcome (Borchert)  
The meeting was called to order at 10:02 am.  

2.0 Treasurer’s Report (Geckle)  

3.0 Secretary’s Report (Getz)  
The new physical banners with the new NASIG logo and tagline has been ordered. The banners should be printed before the end of April.  

4.0 NISO Membership (Borchert)  
There was a discussion on NISO membership regarding our NISO representatives. Oberg and Creech are temporarily serving as NASIG’s NISO representatives. Borchert already announced NASIG’s NISO membership in the President’s Corner of the NASIG Newsletter, but a more formal announcement will be made after the Board develops a permanent plan for NASIG NISO representatives.  

CEC needed the Board to vote on whether NISO members would be allowed to get the NASIG member rate for NASIG webinars since NASIG members pay the NISO member rate for NISO webinars.  

VOTE: Robertson moved to allow NISO members to get a NASIG member rate for NASIG webinars. The motion was seconded by Hanson, and the motion passed unanimously.  

5.0 Fundraiser Position Update (Borchert)  
Borchert provided an update on the new Fundraiser Position.  

6.0 Rebranding/Marketing Update (Borchert)  
Borchert hasn’t heard back from Tenney. Borchert will follow up with her to see if Tenney has contacted Non-Profit Help yet.  

Collins had reported earlier in the day that an agreement with Taylor & Francis had been reached regarding their open access policy.  

ACTION ITEM: Borchert and Collins will draft a statement of the outcome of the negotiations with Taylor & Francis. They will run the statement by the rest of the Board for wordsmithing, and then they will send the statement to the Publicist to broadcast to the membership.  

7.0 Committee Reports (All)  
- PPC: Nothing to report.  
- CPC: The Board discussed several of the conference logistics.  
- Archives: Nothing to report.  
- Archives Task Force: Nothing to report.  
- A&R: Nothing to report.  
- Bylaws: Voting on the proposed changes has begun. NASIG members can vote when they log into the NASIG website.  
- CMC: Nothing to report.  
- Proceedings Editors: Nothing to report.  

56  
NASIG Newsletter  
September 2016
• CEC:
  o The Board has approved a new CEC structure that will be in place after the conference.
  o There was discussion about the committee chair training webinar and where the link should go.

ACTION ITEM: CEC should send the link to the committee chair training webinar to CMC to put on the website.

• D&D: Nothing to report.

• E&A: Nothing to report.

• FPTF: A report and recommendation will be ready soon, although not prior to the conference.

• MDC: Nothing to report.

• Mentoring: Mentoring sent out a call for mentors. They encourage members of the Board to participate as mentors.

ACTION ITEM: Beh will send out the link to the Board list where Board members can sign up to be mentors.

• Newsletter: The banner for the Newsletter has been updated.

• N&E: Nothing to report.

• SCCTF: They hope to have a report ready for the Fall Board Meeting.

• Site Selection: They will be meeting soon to discuss the recommendation regarding rotating sites.

• SOC: SOC will be sending out a survey soon to the new student members.

ACTION ITEM Committee annual reports will be due Monday, May 2, 2016.

8.0 Adjourn (Borchert)

The meeting adjourned at 10:48 am.

Minutes submitted by:
Kelli Getz
Secretary, NASIG Executive Board

NASIG Board Conference Call
May 23, 2016

Attendees

Executive Board:
Carol Ann Borchert, President
Steve Kelley, Past-President
Anna Creech, Vice President/President-Elect
Kelli Getz, Secretary
Beverly Geckle, Treasurer

Members at Large:
Eugenia Beh
Christian Burris
Maria Collins
Laurie Kaplan
Wendy Robertson

Ex Officio:
Kate Moore

Guests:
Betsy Appleton, Incoming Member-at-Large
Chris Bulock, Incoming Member-at-Large
Angela Dresselhaus, Incoming Member-at-Large
Adolfo Tarango, Incoming Member-at-Large

Regrets:
Michael Hanson, Treasurer-Elect
Steve Oberg, Member-at-Large

1.0 Welcome (Borchert)

The meeting was called to order at 11:02 am.
2.0 Treasurer’s Report (Geckle)

The administration budget is higher this year than last year due to the Board’s Strategic Planning session on January 21 before the Board’s Winter Meeting on January 22. Additional expenses this year also include NISO membership fees, the purchase of recorders for the Conference Proceedings Editors and the Secretary, and the printing of new physical banners with the new NASIG logo and tagline.

3.0 Secretary’s Report (Getz)

Board Activity Report:

- May 11, 2016: Board approves the minutes from the 3/31 and 4/25 conference calls.

4.0 NonProfit Help (Borchert)

4.1 Marketing

The Board will wait to discuss Marketing with NonProfit Help.

4.2 Insurance

NonProfit Help completed the insurance review.

4.3 Auditing

The tax-exempt status for Indianapolis still needs to be completed.

5.0 Committee Reports (All)

5.1 PPC (Creech)

Introducers have been assigned. Everything else is moving along nicely.

5.2 CPC (Kelley)

The contract with the Balloon Museum has been signed. Outstanding contracts include transportation to the Balloon Museum and the balloon ride contract.

At this point, over 300 people have registered for the conference.

- Archivist/Archives Task Force: Nothing to report.

- A&R: A&R suggested some ways in which the application process could be streamlined, as well as designating a flat reimbursement rate for award recipients. The Board will discuss the suggestions at the Board meeting in June.

- Bylaws: Today is the last day to vote on the Bylaws changes.

- CMC: The Google site search is working.

- Proceedings Editors: Authors of the 2015 Conference Proceedings signed the previous version of the contract. CPE will be following up with those authors to have them sign the new license to publish.

- CEC: Nothing to report.

- D&D: The committee is updating the D&D manual with new procedures.

- E&A: Nothing to report.

- FPTF: Nothing to report.

- MDC: Nothing to report.

- Mentoring: The Mentoring Committee is working on organizing the First Timers’ Reception.

- Newsletter: The May issue is out. Also, a Submissions Editor is still needed.

- N&E: Nothing to report.

- SCCCTF: Nothing to report.
SOC: SOC will be giving out gift cards as an incentive to get students to fill out the survey. The SOC report will be available to the Board before the Board meeting in June.

6.0 Site Selection (Borchert)

A list of sites for potential conference site rotation has been developed and shared with the Board.

7.0 Adjourn (Borchert)

The meeting was adjourned at 11:57 am.

Minutes submitted by:

Kelli Getz
Secretary, NASIG Executive Board

1.0 Welcome (Borchert)

The meeting was called to order at 9:05 am.

2.0 CPC/PPC Report (Kelley, Creech, Appleton, Jones, Marsh, Williams)

CPC discussed the following:

- Approximately 320 attendees registered for the conference.
- CPC is under budget, and sponsorships are higher for 2016 than they were in 2015.
- One presenter was unable to fly, so she will be presenting via Skype.
- Bottles of water will be provided to attendees at the registration desk.

PPC discussed the following:

- Two sessions cancelled [E-preferred approval plan in a large academic library & Assessment and collection development implications], and one session needed to be moved to another day.
- Half of the PPC members were unable to attend the conference.
- Vision sessions will be streamed and also available on the NASIG conference website after the conference.
- Two of the workshops were filled to capacity [A beginner’s guide to MarcEdit and Beyond the Editor: Advanced tools and techniques for working with library metadata].

Guests:
Betsy Appleton (CPC Co-Chair, Incoming Member-at-Large)
Chris Bulock (Incoming Member-at-Large)
Angela Dresselhaus (Incoming Member-at-Large)
Mary Ann Jones (CPC Co-Chair)
Corrie Marsh (PPC Vice-Chair)
Adolfo Tarango (Incoming Member-at-Large)
Danielle Williams (PPC Chair)
The Board appreciates all of CPC and PPC’s hard work in making the Albuquerque conference a success.

3.0 Secretary’s Report (Getz)

3.1 Action Items Update

The Board went through the list of outstanding Action Items. New Action Items include:

**ACTION ITEM:** Dresselhaus will update the FAQ on the conference proceedings site to reflect NASIG’s new agreement terms with Taylor & Francis.

**ACTION ITEM:** Oberg and Creech will work with PPC and CPC to identify a web liaison on each committee. The web liaisons will be in charge of updating the web presence for their respective committees. Additionally, this information needs to be added to both manuals.

3.2 Board Activity Report

**VOTE:** Kelley moved to approve the minutes from the conference call on 5/23. Burris seconded. The motion passed unanimously.

4.0 Treasurer’s Report (Geckle)

- Organizational memberships have increased from 11 in 2015 to 17 in 2016.
- Active individual memberships (excluding student memberships) have increased from 517 in 2015 to 589 in 2016.
- There are 403 student members.
- NASIG now accepts American Express.
- The IRS now has our correct name and address.

4.1 Non-Profit Help--Insurance Review

4.2 Auditing

The company that does NASIG’s taxes advised Geckle to do a review instead of an audit. The review is routine, cheaper, and easier. Audits are typically only done if required for a particular purpose.

The Board reviewed Geckle’s budget to be presented at the Business Meeting.

5.0 Committee Updates (All)

5.1 Archivist/Archives Task Force: Updates

The Board reviewed the activities of the Archivist and the Archives Task Force. Peter Whiting was named as the Archivist-in-Training for the 2016/2017 year.

5.2 A&R: Flat Budget Reimbursement and Streamlining the Questionnaire

There was a discussion around setting a flat amount of money for travel for the award winners. If the winners would go over the amount, they could then submit the receipts for additional compensation.

There was also a discussion around streamlining the award questionnaire. A&R suggested collecting resumes/CV from award applicants. The Board agreed that this was fine as long as resumes/CVs are restricted to 2 pages.

**VOTE:** Creech moved to set a flat $600 reimbursement for travel costs (including the $75 stipend for meals) for award winners (excluding the Mexican Student Award winner) with the option of getting reimbursed for additional costs. Oberg seconded, and the motion passed with 11 votes in favor and 1 abstention.

**ACTION ITEM:** Bulock will notify A&R regarding the new flat $600 reimbursement travel policy.

5.3 SOC: Sponsorships for Potential Student Snapshot Speakers

The Board decided not to pursue sponsorships for potential student snapshot speakers. However, SOC and PPC need to work together to organize the student snapshot speakers for the 2017 conference. There is also the potential that the student award winners would be offered a slot at the Snapshot Sessions in
addition to having the option to write up reports for the NASIG Newsletter.

**ACTION ITEM:** SOC will work with PPC to organize the student snapshot speakers for the 2017 conference (Oberg). A&R may need to be involved if student award winners are offered a slot at the Snapshot Sessions.

Additionally, the Board agreed that it is important for SOC’s outreach ambassadors to communicate well with library schools in the Indianapolis area for the 2017 conference. There was a recommendation for SOC to work with the Publicist to send out blast emails to library school students and outreach ambassadors prior to the conference to publicize the student awards, the snapshot sessions, and any additional information of interest to student members. The Board also agreed that outreach ambassadors need to be copied in on any email sent to student members.

**ACTION ITEM** Oberg will work to coordinate SOC and the Publicist to send out information of interest to student members and outreach ambassadors prior to the 2017 conference.

**ACTION ITEM** SOC will review the list of outreach ambassadors to verify that the list is current, identify those schools for which there is no outreach ambassador, and include any Canadian schools that may not be on the list. Additionally, SOC will include the list of outreach ambassadors on the NASIG website. (Oberg)

**5.4 Site Selection: Site Rotation Discussion**

There was a discussion of rotating sites. Benefits to rotating sites include the ability to create manuals for CPC on running the conference and better deals to be had if we return to a site. More will be discussed at the Business Meeting.

**5.5 New Committee/Position Updates**

**5.5.1 Strategic Planning Implementation Task Force**

A Strategic Planning Implementation Task Force has been assigned.

**5.5.2 Digital Preservation Task Force**

A Digital Preservation Task Force has been assigned.

**5.5.3 Fundraising Coordinator**

The Board discussed the status of the Fundraising Coordinator position.

- **A&R:** The Board clarified that it is acceptable to have more than one student award winner per year. A&R can determine the number of award winners based on their annual budget. If A&R chooses to offer more awards than their current budget allows, they can contact the Board to request more money.

- **Bylaws:** The vote to approve the changes to the bylaws passed with only 2 votes against the changes.

- **CMC:** The Board recognizes the large amount of work done by this committee during 2015/2016.

- **Conference Proceedings Editors:** Dresselhaus reviewed the MOUs. There is need to change the language so that authors can choose to write their own papers. Also, the Proceedings Editors set the due date for the papers, and this needs to be updated in the MOU each year.

**ACTION ITEM:** Dresselhaus will send the changes to the MOU to PPC.

- **CEC:** Nothing to report.

- **D&D:** Nothing to report.
• E&A: Nothing to report.

• FPTF: Nothing to report.

• MDC: Nothing to report.

• Mentoring: Nothing to report.

• Newsletter: The Newsletter will be writing up profiles of long-time NASIG members.

• N&E: Nothing to report.

• SCCCTF: The timeline for their report was sent to the Board. The Board approved of the timeline.

6.0 NISO Representative/Project COUNTER Discussion (Borchert)

The Board discussed the need to appoint a NASIG representative for NISO. Currently, the NASIG President and the Vice-President/President-Elect serve as NASIG’s representatives to NISO. All agreed that the NASIG representative should not be an elected person because the representative would need to be both interested in the position and knowledgeable about the NISO standards.

The Board decided to create a Standards Committee. The NASIG NISO representative would serve on the Standards Committee and would both interpret the ISO standards and vote on NASIG’s behalf. The Standards Committee would be constructed of 5 individuals with terms ranging from 1-5 years, and the Standards Committee can select a chair and decide which person will serve as the official NASIG NISO representative.

ACTION ITEM Oberg will appoint a Standards Committee.

NISO did recommend that NASIG send out a summary of the standard to the NASIG listserv, not the entire standard.

The Board discussed becoming an organizational member of COUNTER because COUNTER supports the work of e-resources and serials librarians. Becoming an organizational member of COUNTER would also give NASIG the ability to vote at general meetings and provide guides and trainings for NASIG members. The Standards Committee would be body that would be in charge of voting on NASIG’s behalf, and members of the committee could possibly serve on one of COUNTER’s working groups.

VOTE: Oberg moved for NASIG to become an organizational member of COUNTER for $469. The motion was seconded by Robertson, and it passed unanimously.

7.0 2017 Conference Streaming (All)

The Board discussed the streaming options for the 2017 conference. Currently, only the vision speaker speeches are being streamed. The goal is to eventually stream 100% of the conference, although incremental steps will likely be taken each year in order to get to 100%. Additionally, recorded copies of the conference sessions were discussed. CPC’s budget for A/V costs will likely need to be increased.

8.0 Conference Coordinator Overlap (All)

Anne McKee continues to serve as Conference Coordinator, and she has agreed to serve as Conference Coordinator for the 2017 conference. There were some concerns about succession planning when McKee steps down, and the possibility of a Conference Coordinator-in-Training was discussed. The Board would like to make note of the hard work and time spent by McKee in making the NASIG conference a success.

9.0 Parking Lot Issues (All)

The Board discussed the continuation of the free student memberships. All agreed that this program has been successful in getting more students to join. Over four hundred students signed up for the free student memberships for the 2016 year.
**ACTION ITEM:** Hanson will work with D&D to update the membership renewal message to include information specifically regarding the student memberships.

**VOTE:** Oberg moved to continue the free student memberships in perpetuity. Creech seconded, and the motion passed unanimously.

**ACTION ITEM:** Kaplan will notify MDC to let them know that the free student memberships will continue in perpetuity.

**ACTION ITEM:** Oberg will notify SOC to let them know that the free student memberships will continue in perpetuity.

There was also a discussion about using Skype during the committee meetings so that committee members unable to travel to the conference could meet. The Board agreed that this can continue on an ad hoc basis and does not need to be standardized.

The Board did agree that committee members on CPC and Mentoring do need to make a great effort to attend the conference. This should be communicated to committee members when they are offered positions on these committees.

**10.0 Adjourn (Borchert)**

The meeting was adjourned at 5:20 pm.

Minutes submitted by:

Kelli Getz
Secretary, NASIG Executive Board
NASIG Treasurer’s Report

31st Annual Conference, June 2016
Beverly Geckle, Treasurer

Current Balance Sheet

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<th>May 31, 2016 Amount</th>
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Retrospective Comparison

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<tbody>
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<tr>
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<td>JP Morgan Investments</td>
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<td>Alternative Assets</td>
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</tr>
<tr>
<td>Total Equity</td>
<td>$624,383.66</td>
</tr>
</tbody>
</table>
2016 Organizational Members

- AIP Publishing
- American Chemical Society
- bepress
- Cabell's International
- De Gruyter
- Duke University Press
- EBSCO Information Services
- Harrassowitz
- IOP Publishing
- NA Publishing, Inc.
- Oxford University Press
- Penn State University Press
- Rockefeller University Press
- SAGE Publications
- Springer
- Taylor & Francis
- WT Cox Information Services

2016 Conference Sponsorships Total

$37,675.00

2016 Webinar Income Total

$5,950.00
**Committee Reports/Updates**

**Archivist Annual Report**

Submitted by: Sara Bahnmaier

**Members**

Sara Bahnmaier, archivist (University of Michigan)
Peter Whiting, archivist-in-training (University of Southern Indiana)
Carla Bywaters, Photo historian (graduate student at San Jose State University)
Zahra Saeedozakerin, Photo historian (Concordia Library and graduate student at McGill)
Kelli Getz, board liaison (University of Houston)

**Continuing Activities**

The NASIG photo archive is on Yahoo Groups as a private site that was set up in 2010. It contains some documents and clips as well. We tried Flickr for a public photo site before, but we experienced too many irrelevant comments and deleting them from the Flickr site got to be a burden. We will review the Yahoo site and sort out which files to move to a Dropbox account that can be accessed by the publicist and CMC to obtain image files for the website, and which ones to send to the UIUC archive. Dropbox is not an elegant solution but it buys us time to investigate other options: Apple Photo, Lyve, Shoebox, Adobe and Mylio, etc. Some are free; others require a low fee, less than $100. We’ll make a recommendation to the Board but cannot make a budget request at this time.

Sara will be setting up a task calendar by August, assign tasks for moving the photo archives from Yahoo Groups to Dropbox and conduct monthly follow-up with committee members on their tasks and send deadline reminders as appropriate.

Sara is tasked with sending updates on the history timeline to CMC for the website by August 1.

**Completed Activities**

The previous photo historian stepped down and Anna Creech put forth a call for volunteers and appointed two students to share the position and tasks: Carla Bywaters, San Jose State University and Zahra Saeedozakerin, working at Concordia Library and a graduate student at McGill. Neither of them could get institutional funding to attend the annual meeting but they agreed to collaborate on the photo historian role.

Peter Whiting was appointed as the archivist-in-training to take over when Sara’s term ends in June 2017.

In May, Sara attended a 3-day meeting on personal digital archiving with hands-on workshops to learn about availability of tools and feasibility of converting parts of our paper archive into digital format online so it can be more accessible to the board, committees and members.

Photos of award winners were taken by Deberah England at the conference.

**Budget**

Our deposit account with the Archives at University of Illinois shows $399 balance. This is more than sufficient to take care of the next deposit of papers from 2013-2016. Any additional deposit is at the board’s discretion.

**Questions for Board**

There are banners created for previous annual meetings that are currently stored in Kelli’s office. I believe she said there are four of them with old logos. The archive does not contain artifacts, just documents, but Kelli offered to have photos taken in her library and send
them to this committee to be archived. What does the board want to do with the actual banners?

Submitted on: June 24, 2016

**Mentoring Group 2016 Annual Report**

Submitted by Sandy Folsom

**Members**

2015/2016
Simona Tabaracru, chair (Texas A & M University)
Sandy Folsom, vice-chair (Central Michigan University)
Adolfo Tarango (University of British Columbia)
Eugenia Beh, board liaison (Massachusetts Institute of Technology)

2016/2017
Sandy Folsom, chair (Central Michigan University)
Trina Holloway, vice-chair (Georgia State University)
Rachel Lundberg (Duke University)
Adolfo Tarango, board liaison (University of British Columbia)

**Continuing Activities**

The Mentoring Group is working with the Student Outreach Committee on a proposal to create a year-long mentoring program for student members of NASIG. A conference call for members of both groups and board liaisons took place on July 19. A follow-up call is scheduled for mid-September. The Mentoring Group will take the lead on developing mentor/mentee applications for the proposed program. The entire proposal is projected to be submitted to the Executive Board prior to the fall meeting.

**Completed Activities**

The mentoring program proved quite popular at the conference in Albuquerque. The final participation totals were 31 mentees and 27 mentors. Initially, there was a dearth of volunteers to mentor. Some more mentors volunteered after requests were posted to NASIG-L and the NASIG Facebook page and committee members directly asked individuals to volunteer. Also, some of the mentors agreed to work with two mentees.

The First-Timers Reception was well attended. There was a drawing for door prizes, gift cards to Starbucks, Amazon, and Barnes & Noble. Unfortunately, the room was a bit small. There was access to a patio but most attendees chose not to take advantage of it. As a result, the room was quite crowded and noisy. This was mentioned in several of the responses to the mentoring program survey. Overall, the reception seemed to be an enjoyable experience but room size should be a consideration in future conference planning.

After the conference, the mentors and mentees were asked to participate in a survey regarding the mentoring program. The survey was conducted via the NASIG website. Notifications were e-mailed directly to all participants. A reminder was posted on NASIG-L and the NASIG Facebook page. There were a total of 31 responses, 13 from mentors and 18 from mentees. What follows is a summary of the results.

There were two questions about how the mentoring program was publicized. The vast majority of respondents indicated that they learned about the programs via NASIG-L. When asked if publicity was adequate, most gave an affirmative response.

When asked, “What was your favorite part of the experience?” most responses focused on mentor/mentee interactions. Some examples:

- “Recommended some sessions based on my interests and the nature of my library”
- “Helped me come out of my shell and start networking right away.”
- “Meeting an experienced NASIG member-mentor and being able to touch base throughout the conference, secure in the knowledge that I would be able to ask “newbie” questions if needed!”
- “Learning new things from my mentee.”
• “Meeting with someone who was attending for the first time and being able to answer questions and encourage participation.”

Mentees were asked if the programs were of value to them. Nearly all the responses were positive. Some examples:
• “Yes. My mentor introduced me to a lot of people that I ended up talking to again, later in the conference.”
• “Yes, made me feel welcome and included.”

When asked for suggestions for improving the program, there were a number of comments about deficiencies in the venue for the First-Timers reception:
• “Such a small place that it got too noisy and hard to hear each other.”
• “The initial gathering was a bit awkward, but I think that was partially due to space constraints.”

Several other participants suggested that there be follow-up opportunities later on in conference via another event for mentors/mentees. There were also some suggestions about the mentor/mentee matching process. Some indicated that they didn’t feel that they had much in common with their mentor or mentee and that the experience would have been improved if there were more common interests between them. Others suggested that the matching process occur earlier so there would be more time to communicate.

Finally, all but one of the respondents indicated that they would participate in the program again. There were also a number of positive remarks and thank-yous left in the Other Comments box.

Budget

The Mentoring Group did not have its own budget in 2015/2016. The only expenditure was for $100 worth of gift cards that were door prizes at the First-Timers Reception. The gift cards were obtained by the Treasurer via a rewards program from the bank that NASIG uses.

Recommendations to the Board

Move forward with the idea of including an option for mentoring participation on the conference registration. This may help alleviate the problem we had this year when there were not enough volunteers to mentor.

When addressing the proposal for the student mentoring program, consider a name for the new program that is unique enough to distinguish it from the current mentoring program. If both names are similar, it will be confusing.

Submitted on: August 5, 2016

Program Planning Committee Annual Report

Submitted by: Danielle Williams

Members

Danielle Williams, chair (University of Evansville)
Corrie Marsh, co-chair (Stephen F. Austin State University)
Marsha Aucoin (EBSCO)
Lisa Blackwell (Chamberlain College of Nursing)
Sharon Dyas-Correia (University of Toronto)
Rene Erlandson (University of Nebraska, Omaha)
Benjamin Heet (North Carolina State University)
Kittie Henderson (EBSCO)
Violeta Ilik (Northwestern University)
Betty Landesman (University of Baltimore)
Buddy Pennington (University of Missouri, Kansas City)
Anna Creech, Board Liaison (University of Richmond)

We began contacting potential vision speakers August, 2015. We received several suggestions from the board and the committee suggested several vision speakers. Ultimately, with the board’s approval, we asked Heather Joseph from SPARC, Jim O’Donnell from University of Arizona, and T. Scott Plutchak from University of Alabama to speak at the conference.
Call for proposals was open from October 1 to December 15, 2015. There were 32 concurrent sessions with 65 speakers participating in sessions. One session had to be cancelled due to speakers’ inability to attend, and one session required the use of Skype to conduct their session. The Skype session went very well and I recommend Skype as an alternative for future sessions when speakers cannot attend.

The use of Proposal Space to collect and review proposals made the process much more streamlined. The committee seemed to appreciate the ease of use and committee chairs greatly appreciated the ease of use.

The committee also used Sched to create the conference schedule. The cost is minimal and the benefits are enormous. Conference attendees can easily identify what sessions they wish to attend and the program sends an email each day of the conference alerting attendees to the sessions they are scheduled to attend. In addition, the Conference Planning Committee encouraged attendees to use Sched in lieu of providing printed schedules for attendees. The CPC should continue to encourage attendees to use Sched or to print their own copies of the schedule instead of providing printed copies of the schedule.

There were limited submissions for Great Ideas Showcase and Snapshot Sessions. Four speakers submitted proposals for the Snapshot session, but one speaker did not show up at the session. There were six submissions for Great Ideas Showcases, which were well attended.

There were four pre-conference workshops presented and were well-attended. Eleanor Cook, Maria Collin, Shana McDanold, Terry Reese, Marlene Van Ballegooie, Kristen Wilson, Sheri Meares, Corrie Marsh and Dylan Wackerman presented five sessions. Shana McDanold and Terry Reese’s workshops on MARCEdit were very popular and I recommend offering additional cataloging and MARCEdit workshops at future conferences. The pre-conferences were held on Wednesday morning, Wednesday afternoon, and Thursday morning. I recommend that pre-conferences be held on Wednesday afternoon and Thursday morning.

**Archives Task Force Annual Report**

Submitted by: Sara Bahnmaier

**Members**

Sara Bahnmaier, Co-chair (University of Michigan)
Peter Whiting, Co-chair (University of Southern Indiana)
Eleanor Cook, member (East Carolina University)
Jeannie Castro, member (University of Houston)
Carol Ann Borchert, board liaison (University of South Florida)

**Continuing Activities**

We are in the process of obtaining an access copy from the NASIG Archive of a recorded video from the 25th anniversary celebration in 2009.

We are gathering updates to NASIG history from 2012-2016 including the 30th Anniversary Celebration, which will be written for the website.

We are investigating the requirements and scope of undertaking a digitization project to create a NASIG online archive. The committee is charged with writing a report on moving the Archive and making it more accessible to members.

**Completed Activities**

CMC set up a mail list at archives-tf@internal.nasig.org
The first conference call was held on April 8, 2016.
Carol Ann met with Sara at the annual meeting in Albuquerque and recommended appointing Peter Whiting as Co-Chair.
**Budget**

Conference calls ($0)

Co-chairs will travel to the archive at University of Illinois Urbana-Champaign on a week day when the Archive is open and the Archivist is available for an appointment. No date is set yet. The requested budget includes mileage for personal autos, lodgings and meals. ($820)

Submitted on: June 24, 2016

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**Active Individual Memberships**

May 2015: 517
May 2016: 589

**Student Memberships:**

May 2016: 403

**Organizational Memberships**

May 2015: 11
May 2016: 17
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  Cerritos College
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  Colorado State University
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  Clemson University
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  Wake Forest University

In 2016, the Newsletter is published in March, May, September, and December. Submission deadlines (February 1, April 1, August 1, and November 1).

Send submissions and editorial comments to:

**Kate B. Moore**  
Indiana University Southeast Library  
New Albany, Indiana  
Phone: 812-941-2189  
Email: kabmoore@ius.edu

Send all items for “Checking In”, “Citations,” & “Title Changes” to:

**Kurt Blythe**  
University of North Carolina, Chapel Hill  
Email: kcblythe@email.unc.edu

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Assistant Head of Acquisitions  
University of Houston Libraries  
4333 University Drive  
Houston, TX 77204-2000  
United States  
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Email: membership@nasig.org