NASIG 33rd Annual Conference
Transforming the Information Community
June 8-11, 2018 · Atlanta, Georgia

June 7 • Thursday

7:00am – 5:00pm  R  Registration  Meeting Planner
Office I, Lower Lobby Level

8:00am – 5:00pm  P  Preconference: A Beginner’s Guide to MarcEdit 7  Buckhead Ballroom I

Speakers: Terry Reese
Released at the end of 2017, MarcEdit 7 represents the most recent version of the MarcEdit software suite. So, whether you are just hearing about MarcEdit, or have used it for years and interested in learning how you might be able to improve your existing workflows and processing – this preconference will endeavor to provide you with the tools that you need to take your MarcEdit skills to the next level. Presented by the software creator, the preconference offers attendees and opportunity to learn using real-world questions address issues like automation, regular expressions, and common MARC processing questions. Additionally, this presentation will look at new functionality in MarcEdit 7…from new linked data functionality, deeper integrations with OCLC, and new tools related to clustering and accessibility – this preconference will give users the opportunity to see not only what MarcEdit can do today, but where it is going.

Primary Audience: Novice to Power MarcEdit users. What will not be covered is scripting/programming using MarcEdit. Additionally, regular expressions will only be an overview – a deep discussion of regular expressions is out of scope for this session

8:00am – 5:00pm  P  Preconference: Introduction to Serials Cataloging with RDA  Buckhead Ballroom II

Speakers: Steve Shadle
Resource Description and Access (RDA) is the cataloging standard that replaced AACR2. This Basic Serials Cataloging Workshop, part of the Serials Cataloging Cooperative Training Program, will offer an introduction to cataloging serials with RDA. It will cover RDA and CONSER standards, RDA core elements and terminology, transcribed versus recorded elements, new or revised areas of information, and creation of new records and serial maintenance. Attendees will participate in hands-on exercises which will include use of tools and documentation in support of cataloging with RDA. Access to the PowerPoint presentation will be given to participants ahead of the workshop via email.
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<tr>
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<tr>
<td>8:30am – 5:00pm</td>
<td><strong>Board Meeting</strong></td>
<td>Library</td>
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<td>10:00am – 10:30am</td>
<td><strong>Preconference: break</strong></td>
<td>Buckhead Foyer</td>
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<td>Coffee, Decaffeinated coffee, tea</td>
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<td>3:00pm – 3:30pm</td>
<td><strong>Preconference: break</strong></td>
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<td>Regular, Diet and Decaffeinated Coca-Cola Soft Drinks and Assorted BoomChickaPop Popcorn</td>
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### June 8 • Friday

**Meeting Planner Office**
I, Lower Lobby Level

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<tr>
<td>8:00am – 5:00pm</td>
<td><strong>P Preconference: Linked Data for Serials</strong>&lt;br&gt;&lt;i&gt;Speakers: Amber Billey, Robert Rendall&lt;/i&gt;&lt;br&gt;Are you baffled by BIBFRAME? Overwhelmed by ontologies? Or feeling turmoil about Turtle? Then this workshop is for you. Learn the practical foundations of Linked Data with a particular focus on serials in this one-day workshop. The presenters will go beyond just talking about RDF triples and actually break down linked data technology and how its application can be utilized for serials. Topics to be covered:&lt;br&gt;- Linked Data 101&lt;br&gt;- Ontology Basics&lt;br&gt;- Turtle Tutorial&lt;br&gt;- BIBFRAME&lt;br&gt;- Other ontologies for libraries&lt;br&gt;- CONSER Standard Record to BIBFRAME 2.0 Mapping&lt;br&gt;- Current hot topics in serials and linked data&lt;br&gt;Attendees are strongly encouraged to bring a laptop. The presenters will be demonstrating online linked data tools that attendees will have the opportunity to use, and the workshop will include hands-on exercises working with ontologies and creating linked data descriptions of serials.</td>
<td>Buckhead Ballroom I</td>
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<td>10:00am – 10:30am</td>
<td><strong>K Preconference: break</strong>&lt;br&gt;Coffee, Decaffeinated coffee, tea</td>
<td>Buckhead Foyer</td>
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<td>1:00pm – 3:00pm</td>
<td><strong>A User Group Meeting: Alma</strong>&lt;br&gt;&lt;i&gt;Speakers: Chris Bulock&lt;/i&gt;&lt;br&gt;Alma Users Group (Convener: Chris Bulock)</td>
<td>Highland Ballroom III</td>
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<td>1:00pm – 3:00pm</td>
<td><strong>A User Group Meeting: CORAL</strong>&lt;br&gt;&lt;i&gt;Speakers: Steve Oberg, Heather Wilson&lt;/i&gt;&lt;br&gt;CORAL User group meeting (Convener: Heidi Becker)</td>
<td>Library</td>
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<td>1:00pm – 3:00pm</td>
<td><strong>A User Group Meeting: Dimensions &amp; Anywhere Access</strong>&lt;br&gt;&lt;i&gt;Speakers: Heidi Becker&lt;/i&gt;&lt;br&gt;Discussion Group: Dimensions &amp; Anywhere Access (Convener: Heidi Becker)&lt;br&gt;Are your researchers purchasing publications and materials you’ve already painstakingly subscribed to? Are they accessing the materials on platforms where you can’t monitor their use? In this session, we will have a brief Q&amp;A about Dimensions, with a special focus on using Dimensions with Anywhere Access - a Digital Science service that provides one-click, legal access for your users to your library's holdings from within the Dimensions platform. We’ll show you the magic in action and answer your questions.</td>
<td>Highland Ballroom IV/V</td>
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| 1:00pm – 3:00pm | A Ivy I/II             | **User Group Meeting: The Pros and Cons of Discovery Layers for Today’s Library**  
*Speakers: Beverly Charlot*  
Discussion Group: The Pros and Cons of Discovery Layers for Today’s Library (Convener: Beverly Charlot)  
Interested attendees will discuss how discovery layers provide access and the user’s experience in locating library materials. |
| 1:00pm – 3:00pm | A Azalea               | **User Group Meetings: Informal Round Table Discussion Groups**  
*Speakers: Melissa Belvadi, Martin Patrick*  
Informal Discussion Groups: Please join a discussion group of your choice.  
- How many knowledgebases do we need? Managing e-holdings in OCLC and elsewhere (Convener: Martin Patrick)  
- Ebook Acquisitions (Convener: Melissa Belvadi)  
Discussion will focus on ebook purchase models (DDA, EBA, subscription) - choices, handling discovery, and holdings overlap issues. |
| 1:00pm – 3:00pm | A Highland Ballroom I/II | **User Group Meetings: Print journals – Current Practices and Effectiveness**  
*Speakers: Helen Monagle, Derek Wilmott*  
Discussion Group: Print Journals – Current Practices and Effectiveness (Conveners: Derek Wilmott and Helen Monagle)  
Discussion topics for this meeting will include current practices and effectiveness of consortia shared print and storage services, systems in place for collating print usage statistics, and other related topics relevant to management of print journals. |
| 1:00pm – 5:00pm | P Buckhead Ballroom II | **Preconference: Beyond “Set it and Forget it”: Proactively Managing Your EZproxy Server**  
*Speakers: Jenny Rosenfeld*  
When was the last time you really took a deep dive into your EZproxy configuration? Many EZproxy administrators are happy that EZproxy “just works,” but they may be missing critical opportunities to provide better access to their e-resources. In this workshop, Jenny Rosenfeld, Senior Implementation Program Manager at OCLC, will share a simple monthly routine to help reduce your patrons’ barriers to access and identify potential security concerns. We’ll also cover current topics of interest to the EZproxy community, such as how to modify database stanzas to support HTTPS, for both OCLC-hosted and self-hosted customers. |
| 3:00pm – 3:30pm | K Buckhead Foyer       | **Preconference: break**  
Regular, Diet and Decaffeinated Coca-Cola Soft Drinks and Assorted Clif and Kind Energy Bars |
| 3:00pm – 4:00pm | G Ivy I/II             | **Student Mentoring Orientation**                                                                                                                                                                                  |
| 4:00pm – 5:00pm | F Peachtree            | **First Timers Reception**  
*All items are Gluten Free*  
Build-Your-Own Snack Mix from an assortment of ingredients including Candied Pecans, Spiced Almonds, Pistachios, White Chocolate Bits, Milk Chocolate Chips, Raisins, Dried Cherries, Apricots and Peachtree |

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# Gluten-Free Pretzels
Sparkling Citrus and Mint Lemonade

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<tr>
<td>5:30pm – 6:30pm</td>
<td><strong>Opening Session</strong></td>
<td>Grand Ballroom II/III</td>
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<td>David Bradley will be our opening speaker. David is a self-described storyteller, writer, filmmaker, and history geek, with an obsession for the history of Atlanta, where he has lived for 33 years. David will perform a stand-up history and visual presentation of Atlanta history. Expect to be entertained, informed, and excited to be in Atlanta.</td>
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<tr>
<td>6:30pm – 10:00pm</td>
<td><strong>Opening Reception</strong></td>
<td>Grand Ballroom I</td>
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<td>The opening reception is already included in all attendee registrations. The increase in guest cost is due to an increase in the food costs for the reception.</td>
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The document-oriented workflows in science have reached (or already exceeded) the limits of adequacy as highlighted for example by recent discussions on the increasing proliferation of scientific literature and the reproducibility crisis. Now it is possible to rethink this dominant paradigm of document-centered knowledge exchange and transform it into knowledge-based information flows by representing and expressing knowledge through semantically rich, interlinked knowledge graphs.

The core of the establishment of knowledge-based information flows is the creation and evolution of information models for the establishment of a common understanding of data and information between the various stakeholders as well as the integration of these technologies into the infrastructure and processes of search and knowledge exchange in the research library of the future. By integrating these information models into existing and new research infrastructure services, the information structures that are currently still implicit and deeply hidden in documents can be made explicit and directly usable. This has the potential to revolutionize scientific work because information and research results can be seamlessly interlinked with each other and better mapped to complex information needs. Also research results become directly comparable and easier to reuse.

The Digital Preservation Task Force proposes a panel discussion wherein we take the opportunity to share updates about the task force’s work, and discuss recent developments in the field of Digital Preservation. The main focus of the session will be a discussion between the panelists with plenty of opportunity for those in attendance to ask questions and offer feedback. Panelists will include members of the Task Force and publisher representation.

Currently, the Task Force is working on documentation to be made available via the NASIG website for reference by librarians, publishers, third party preservation agencies, and other interested parties. In addition, the Task Force has plans to develop a survey to better understand how NASIG can serve its membership and the profession at large with
regard to digital preservation initiatives. The Task Force is also seeking ways in which it can collaborate with other professional organizations to proactively ensure digital preservation of the scholarly record.

10:45am – 11:45am  
**S Information Sharing Pipeline**  
*Speakers: Violeta Ilik, Lukas Koster*  
In this paper we will discuss the proposal of creating an information sharing pipeline [real-time information channel] where all stakeholders would engage in exchange/verification of information about entities. Entities affected by this discussion include personal and organizational names and or identifiers as well as subject headings from different controlled vocabularies. This decentralized system could potentially join together various software instances so that everyone would be able to see the activities in all the hubs. Identified stakeholders include individuals, libraries, vendors, publishers, identity providers, OCLC. The proposed solution is a shared information pipeline where these stakeholders/agents will be able to share and exchange data about entities that would enable real time data exchange. Two W3C recommended protocols are considered as potential solution: the WebSub protocol and the ActivityPub protocol. We will compare and explore the two protocols for the purpose of identifying the best way to create an information sharing pipeline that will enable all stakeholders to have access to most up to date information. According to the document on the World Wide Web Consortium (w3c) site, “WebSub provides a common mechanism for communication between publishers of any kind of Web content and their subscribers, based on HTTP web hooks. Subscription requests are relayed through hubs, which validate and verify the request. Hubs then distribute new and updated content to subscribers when it becomes available.” ActivityPub “is a decentralized social networking protocol based upon the [ActivityStreams] 2.0 data format. It provides a client to server API for creating, updating and deleting content, as well as a federated server to server API for delivering notifications and content.”

10:45am – 11:45am  
**S The Future of Cataloging in a FOLIO Environment**  
*Speakers: Natascha Owens, Christie Thomas*  
FOLIO is an open source Library Services Platform development project that includes partners from the library and vendor communities. FOLIO is designed to be a flexible system meant for all libraries—a system that can be modified to conform to new library standards or technologies and, due to its microservice architecture, is readily adaptable to unique library workflows. This session will focus on the development process from the librarian perspective, specifically the metadata management aspects of FOLIO. Questions that will be addressed include: What are some of the challenges and opportunities that have presented themselves during the development process? What types of applications are available in FOLIO that will be used to create and manage bibliographic and holdings metadata? How does FOLIO intend to accommodate the future of cataloging?

10:45am – 11:45am  
**S The New Dimensions in Scholcomm: How a global scholarly community collaboration created the world’s largest linked research knowledge system**  
*Speakers: Heidi Becker, Ralph O’Flinn, Dr. Robert Scott*  
Digital Science and 100+ global research institutions have spent the better part of the last two years collaborating to solve three distinct challenges in the existing research landscape:

* Research evaluation focuses almost exclusively on publications and citations data  
* Research evaluation tools are siloed in proprietary applications that rarely speak to each other  
* The gaps amongst proprietary data sources made generating a complete picture of impact extremely difficult (and expensive)

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The goal of this collaboration amongst publishers, funders, research administrators, libraries, and Digital Science was to transform the research landscape by attempting to solve the problems resulting from expensive, siloed data research evaluation data.

10:45am – 11:45am

S Transforming the Quality of Metadata in Institutional Repositories

*Speakers: Margaret Mering*

Established in 2005, the University of Nebraska-Lincoln Libraries manages one of the largest and most-used institutional repositories in the country. It has approximately 95,000 unique items. There have been nearly 45 million full-text downloads of the works. It is powered by bepress. The staff consists of three faculty and one managerial-professional staff member. The repository hosts original journals, including: Library Philosophy and Practice, Transactions of the Nebraska Academy of Sciences, Journal of Women in Educational Leadership, Manter: Journal of Parasite Biodiversity, RURALS: Review of Undergraduate Research in Agricultural and Life Sciences, SANE journal: Sequential Art Narrative in Education, and Contemporary Issues in Educational Leadership. The IR also hosts backlists or online sites for: Journal of the National Collegiate Honors Council, Honors in Practice, Insecta Mundi, Great Plains Quarterly, Great Plains Research, Textile Society of America Symposium Proceedings, Nebraska Law Review, Nebraska Bird Review, Nebraska Anthropologist, Cornhusker Economics, and Business in Nebraska. The Zea Books, the repository's imprint, has published monographs in areas of reference, bibliography, ornithology, modern European history, zoology, botany, art history, music history, Native American studies, and early childhood and language education. More than fifty Zea Books titles have appeared since 2006.

This presentation will cover the workflows that have been established for managing the identities (authority control) of journal authors, adding ORCIDs for authors and working on the quality of metadata in the institutional repository. It will explore the limitations of attempting to manage the identities of authors in an IR (i.e., the metadata template is limited, e.g., no cross references, no dates or qualifiers for names). It will look at how users access the materials in the repository and why some may question if working on metadata quality is really necessary or sustainable in an IR. Finally, it will discuss the plan to create Nebraska Scholarly Commons, a repository for all four University of Nebraska campuses, and the possible impact on metadata.

11:45am – 1:15pm

L Lunch in the Vendor Expo

11:45am – 3:45pm

V Vendor Expo

1:15pm – 2:15pm

S An Ongoing Treasure Hunt - One library's practical experiences documenting post-cancellation perpetual access

*Speakers: Arthur Aguilera, Nancy Sims Donahoo*

Experiences realized by Albertsons Library staff in documenting post-cancellation perpetual access offers practical solutions for implementing a 'controlled approach' to recordkeeping and workflow which focuses on the 'longer run' large purchase deals and packages. While undoubtedly some perpetual access e-journal content may well 'slip through the cracks', on-going access to highly used and/or expensive purchases would be chronicled.

In a 2014 article entitled "Providing Perpetual Access: Results of a Survey", author Sarah Glasser identified 'four top challenges' encountered in efforts to provide post-cancellation perpetual access for e-journal content. These included the "extensive work involved, documentation shortfalls, dealing with transferred titles, and license issues". (Glasser 2014, p.150)
Albertsons Library embarked on a practical effort this past year to document post-cancellation perpetual access for those ejournal titles that had been or were part of large package purchases. It was felt there would be more success to work with vendors and publishers from whom we had purchased content over long periods of time. Documenting content to which we were entitled was challenging, and hampered by limits to accounting records maintained at the Library and University; a change in the Library’s ILS system; limited or incomplete access to 3rd party subscription agent order and payment records; and changes or the demise of consortia. Decisions were made to ‘work with the known’ more recent electronic journal content purchased, and to work backwards from there, using the interest and talents of a graduate MLIS student employed elsewhere in Library. A procedure for creating standardized notation of perpetual access scope by title was devised for use in the ILS cataloging module as well as the Library’s ERMS system.

This proposed program at the NASIG conference in Atlanta in June 2018 would provide an opportunity to offer examples of practical workflows and procedures pertaining to documentation of perpetual access while sharing insight into the ‘pitfalls’ and ‘dead-ends’ encountered for finding the needed information to claim ongoing access to these electronic resources.

1:15pm – 2:15pm  S Collection Management, Assessment, and Development: Reviving collections during LMS implementation

*Speakers: Erin Ridgeway*

As small academic libraries move towards new, cloud-based systems, metadata evaluation and whole-collection analysis has never been easier. These libraries have small or non-existent staff, limited resources, and sometimes a lack of training that prevent them from maintaining a dynamic, vibrant collection. Meanwhile, budget cuts, the increased demand for e-resources and changing technology require budgetary funds to shift to other resources and endeavors. For this library, years of print and microform metadata issues as a result of poor training, difficult to use systems, and a lack of adherence to cataloging standards created several serious problems when migrating from Ex Libris Voyager to OCLC WMS. Migration presented the opportunity to correct these issues and evaluate the print and electronic collections as a whole to create an up to date collection with far greater impact for our university’s curriculum. This presentation will detail the workflow changes, along with several of the issues we experienced during migration and how we corrected them. How we used our new LMS to evaluate our collections for overlap, suitability, and usage to deselect materials and shift funds to other resources will also be discussed.

1:15pm – 2:15pm  S Cultivating TALint: Using the Core Competencies as a framework for training future information professionals

*Speakers: Marlene van Ballegooie, Jennifer Browning*

In 2014, the University of Toronto’s Faculty of Information and the University of Toronto Libraries (UTL) partnered in the development of the TALint (Toronto Academic Libraries Internship) program. Focused on workplace-integrated-learning (W-I-L), the TALint program provides enhanced educational experiences for Masters of Information students by combining periods of in-class study with actual workplace experiences. The two-year program is intended to enhance the quality of student learning by providing interns with specialized knowledge and practical skills, professional development and mentorship opportunities. It is often the case that the workplace is ahead of academic programs. This is particularly true in technical services and the field of electronic resource management, where the requisite knowledge and practical skills required to perform these roles has traditionally been under-represented within library and information studies curricula. The TALint program has provided UTL with the unique
opportunity to bridge the gap between the expertise developed through information studies programs and the specific knowledge and skills required to take on roles as electronic resource librarians. With this year’s TALint cohort in UTL’s Metadata Technologies Team, we are using NASIG’s Core Competencies for Electronic Resources Librarians as a framework for training our two TALint interns. In this session, presenters will discuss the development of a comprehensive student training plan in electronic resource management, the ongoing assessment of learning outcomes, student perceptions of competency-based training, and the benefits of using the Core Competencies that have been felt beyond the internship program. We will share how this training plan can better equip Masters of Information students for careers in electronic resource management by producing graduates who are qualified, technologically skilled and workplace-ready.

1:15pm – 2:15pm

S Journal Collection Analysis and Evaluation for Outreach and More!
Speakers: Nat Gustafson-Sundell, Evan Rusch
If you could create any collection management report, including any data, what would it look like?

At Minnesota State University, Mankato, we’ve created a tool to provide journal collection analysis and evaluation (JCAE) reports which bring together a wide variety of data in one place. These reports can include Scimago journal evaluative data, any number of COUNTER JR1s, cost and payment data from the integrated library system or from vendor licenses, holdings data from the knowledgebase, subject data from indexes, Scimago, or the knowledgebase, journal data from Ulrich’s, custom data from academic departments, and more, as well as calculations based on combinations of these data. The tool is data-source agnostic. Really, there is no limit to the data we can include in our collection analysis reports. Thus, our question to ourselves – what do we want and why, now that we can do almost anything?

We developed the collection analysis reporting system for several purposes, including full journal collection analysis, evaluation, and review, which we pursue biennially. We are most excited about the outreach opportunities to academic departments. We have formed a team including a development group to prepare reports, and a consultant. The consultant leads a service: (1) to help academic departments or programs realize the value of the collection, (2) to encourage collaboration with the library to improve student utilization of the collection, and (3) to inform library liaison decision-making. Our presentation will be split into two parts. In the first part, we’ll display several reports, including subject-level and collection-level reports. We’ll also provide a peek into how we create these reports. In the second part, we will talk about the JCAE service overall and what we have learned so far by providing these reports to our liaisons and to academic departments. We’ll display and discuss several graphs and figures we have adapted for different stakeholder groups.

We’re especially excited to share some of the opportunities we see as we move forward. We will be migrating our JCAE tool to a new platform and version, so we also want to learn, what else should we be thinking about? What would you want in your own library to help you manage collections and to reach out to academic departments?

1:15pm – 2:15pm

S Navigating 21st-Century Digital Scholarship: Open educational resources (OERs), Creative Commons, copyright, and library vendor licenses
Speakers: Christina Geuther, Rachel A. Miles, Heather Seibert
Digital scholarship issues are increasingly prevalent in today’s environment. We are faced with questions of how to protect our own works as well as others’ with responsible attribution and usage, sometimes involving a formal agreement. These may come in the form of Creative Commons Licensing, provisions of US Copyright, or terms of use outlined by contractual agreements with library vendors. Librarians at Eastern Carolina
University and Kansas State University are among several university libraries now providing services to assist navigating these sometimes legalistic frameworks. East Carolina University Libraries are taking initiatives to familiarize faculty, researchers, and students with Open Educational Resources. Librarians identified a need to have pertinent understanding of the Creative Commons license and how it is used to protect created works that can be shared, modified and reused. At Kansas State, librarians identified the overlap of their subject matters through their correspondence regarding users’ copyright and licensing questions; a partnership formed, and they implemented a proactive and public-facing approach to better meet user needs and liability concerns at a research university.

NASIG audience members will learn how to:
- Find and identify Creative Commons licensed materials
- Modify and cite Creative Commons works
- Obtain a Creative Commons license
- Provide copyright literacy education to their campus communities through outreach and online copyright learning resources
- Present vendor license terms and best practices for the everyday user’s understanding and search process

2:30pm – 3:30pm  
**S Cooperative Cataloging Projects: Managing them for best results**
*Speakers: Charlene Chou, Steve Shadle*

Cooperative cataloging is not a new concept but the ease with which online resources can be accessed provides opportunities for cataloging projects which haven’t existed previously. There are few models for the cooperative cataloging of collection-based projects and those that exist have not been well publicized. This session will provide an overview of a number of projects developed by both the CONSER Program and the Council on East Asian Libraries (CEAL). There are several considerations to be taken account when beginning a project. These include:

- Collection characteristics
- Title list sources
- Record reporting and distribution
- Staffing and organizational support
- Workflows, procedures and training
- Strategies for managing ongoing collections

Because every cataloging project brings unique challenges and opportunities, the presenters will provide real-life examples from the projects they have worked on.

2:30pm – 3:30pm  
**S Electronic Resources in a Consortial Implementation of Alma and Primo**
*Speakers: Chris Bulock*

After years of planning and preparation, the 23 libraries of the California State University went live with a consortial implementation of Alma and Primo in the summer of 2017. A primary goal of that project was to simplify the management and sharing of consortially purchased or brokered electronic resources. During implementation, we discovered that many of our assumptions regarding electronic resources in a shared environment did not match the reality. While the consortium was able to eliminate duplicate work in some areas, this often came with significant tradeoffs or unintended consequences.

Attendees will learn how electronic resource management in a Library Service Platform differs from a traditional ILS or ERM system. Attendees will also learn about the nature of ERM work in a consortial Alma implementation, and the interconnected issues of shared metadata, discovery, and full text fulfillment. There will be ample time for Q&A.
Knowledge Management for Collection Development: Transforming institutional knowledge into tools for selectors

Speakers: Julia Proctor

In an organization with a decentralized collection development structure, it can be difficult for selectors to find correct and/or detailed information at the point of need when engaging in collection development. Institutional knowledge that is possessed by individuals who have worked at the library for many years is not always easily shared with others due to the lack of an effective conduit. Simply knowing what is happening and what has happened with purchases, licensing, vendor negotiations, budget planning, and policy creation can be a challenge for those who have not been directly involved. This presentation will detail the presenter’s experience in a new collections role at Penn State Libraries and her work gathering the information that exists on shared drives, in file cabinets, dark corners of the intranet, and in the brains of faculty and staff that have worked at the library for many years and making it available to selectors in a meaningful way. The presentation will discuss projects such as compiling information about annual ebook packages and ejournal backfiles as well as Penn State’s management of theses and dissertations. How those projects were identified and prioritized as well as the process for compiling that information and making it available will also be discussed. The presentation will conclude with a long-term plan for storing and presenting this kind of information so that knowledge continues to be shared across Penn State Libraries. Many libraries face challenges with regard to capturing institutional knowledge, and collection development is an area within libraries where historical information needs to be referenced frequently. This presentation will offer attendees some ideas for how to approach this issue as well as the benefit of the successes and failures the presenter experienced while attempting to address this challenge.

Managing a Mass Collections Review from Assessment to Deselection

Speakers: David Burke

Starting in 2017, Falvey Memorial Library at Villanova University initiated a long-overdue collection review of the monograph collection. This is partly to ensure a healthy collection with room for growth, but also to prepare for a renovation of the building--ideally by the summer of 2019. This presentation will explore the ongoing process of organizing and enacting this weeding project. This includes using OCLC’s GreenGlass software to assist liaison librarians with selection, the criteria developed for deselection, and incorporating faculty participation in the project without undermining it. There is also intensive training of student workers to pull the proper books, withdraw them from the catalog and WorldCat, and dispose of them. The talk will highlight the ongoing challenges related to this project, which hopefully would encourage some discussion of the issues.

Wrangle and Corral that License Agreement

Speakers: Carolyn Carpan, Alexis Linoski

By now, you’ve probably attended several sessions to learn and understand what should and shouldn’t be in an electronic resource license agreement. It can be a daunting task to keep track of everything – what items does your university/state require in the license agreement, what can’t be in license agreement, and where exactly are you in that process? Is it under review? Sent for signature? With the General Counsel’s Office? Waiting on the vendor? The possibilities are endless. And, once you’ve got everything squared away, the job isn’t done. Is it in the ERM? Is it filed (either print or electronic or both)?

As anyone who’s worked with License agreements knows, the process of managing the workflow for a license agreement is almost as daunting as reviewing the license agreement. In this session, two librarians will present how they manage the licensing workflow from start to finish.
Alexis Linoski will share how she uses Trello to manage the license workflow from receipt to entry in the ERM. Checklists will be shared as will criteria for choosing what data from each license agreement is entered in the ERM. While the workflow will vary from institution to institution, and in some cases will vary depending on the type of license (i.e. locally negotiated agreement vs a consortial agreement), this process can be modified to meet any workflow need and accommodate collaboration and process management with team members. In addition, it will include a high level overview of some of the features of Trello.

Carolyn Carpan will share how the Collection Strategies Unit at the University of Alberta Libraries inherited two licensing databases, one of which displays usage rights to users and how they merged the two database, using CORAL for their combined product. She will discuss why libraries would build a licensing database and display usage rights for licensed materials to users, how to use the CORAL licensing database for this purpose, discuss advantages and limitations of the CORAL licensing database over other products, and make recommendations for enhancements to the CORAL licensing module.

### 3:45pm – 5:00pm  E  Vendor Lightning Talks

_**Speakers:** Alvaro Arias, Kristin Cunningham, Emily Farrell, Courtney Little, Ken May, Yung Murphy, Kait Neese, Jill Power, Wyatt Reynolds, Caitlin Sheeder-Borrelli, Kimberly Steinle, Emma Waecker_

Vendor Lightning Talks
- Author Services (Ken May, AIP Publishing)
- Affordable Learning with Springer Nature eBooks (Courtney Little & Kait Neese, Springer/Nature)
- Research Now (Emily Farrell, DeGruyter)
- How ACS is Improving Peer Review Education (Yung Murphy, American Chemical Society)
- Bloomsbury Digital Resources (Kristin Cunningham, Bloomsbury)
- Digitalia Academic Databases (Alvaro Arias, Digitalia Hispanica)
- What’s New at Oxford University Press? (Wyatt Reynolds, Oxford University Press)
- EBSCO takes accessibility-first approach (Jill Power & Emma Waecker, Ebsco)

### 5:00pm – 6:00pm  E  Great Idea Showcase

_**Speakers:** Rachel Becker, Melissa Belvadi, Jamie Carlstone, Ernie Evangelista, Caitlin Harrington, Anita Kazmierczak, Megan Kilb, Courtney McAllister, Fiona McNabb, Jeffrey Mortimore, Faye O’Reilly, Erika Ripley, Karen Sheldon, Debra Skinner, Sofia Slutskaya_

### 5:15pm – 6:00pm  E  Student Spotlight Session

_**Speakers:** Jonathan Olivas Gandarilla, Kendra Macomber, LaQuanda T. Onyemeh, Jordan Pedersen_

### 6:00pm – 10:00pm  D  Dine arounds/Dinner on your own

### 9:00pm – 11:30pm  Late night social
# June 10 • Sunday

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<tr>
<th>Time</th>
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<tr>
<td>7:00am – 8:45am</td>
<td><strong>T Breakfast</strong></td>
<td>Grand Ballroom I</td>
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<td>7:00am – 5:00pm</td>
<td><strong>R Registration</strong></td>
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<td>7:30am – 8:45am</td>
<td><strong>C Committee Breakfast</strong></td>
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<td>9:00am – 10:15am</td>
<td><strong>I Vision II: Lauren Smith - Communities of praxis: transforming access to information for equity</strong>&lt;br&gt;<strong>Speakers: Lauren Smith</strong>&lt;br&gt;Title: Communities of praxis: transforming access to information for equity&lt;br&gt;Abstract: Access and accessibility to knowledge for research and professional practice has implications for social equity and democracy. Library and information services have many opportunities to make knowledge discoverable, retrievable and useable, but on many occasions are instead (actively or passively) complicit in maintaining a status quo that feeds social inequality. In this presentation, Lauren will combine work by key theorists in the field, empirical research into information experiences and practices, and her own experiences of establishing an evidence search and summary service for the social services workforce of over 200,000 across Scotland. She will explore issues of access, accessibility and user experience to consider the social justice implications of practices in library and information services, including scholarly communications and systems.&lt;br&gt;This talk will articulate how imbalanced power relations across librarianship and the systems we promote reflect those of society, and offer insights into how, through evidence-based, reflective practice, we can harness the transformative potential of library and information services to improve outcomes for society through democratising access to knowledge. It will explore how critical approaches to user experience, privacy and openness could act as as springboards to change structures within library and information services. With these tools we may mitigate against the inequalities caused by problems such as inaccessibility, algorithmic bias and ideologically-driven policies in the context of educational and workplace information practices, and maximise beneficial outcomes for the public good.</td>
<td>Grand Ballroom II/III</td>
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<td>10:15am – 10:45am</td>
<td><strong>K Break</strong></td>
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<td>10:45am – 11:45am</td>
<td><strong>S Core Competencies at Every Stage</strong>&lt;br&gt;<strong>Speakers: Eleanor I. Cook, Angela Dresselhaus, Rebecca Tatterson</strong>&lt;br&gt;The Core Competencies for Electronic Resources Librarians (CCERL) has defined the role of an electronic resources librarian (ERL) and has served as a framework for additional applications. The (CCERL) has helped ERLs reorganize departments, create updated job descriptions, and implement Library Services Platforms. Librarians have also used the (CCERL) to extend skills to digital projects, weeding projects, scholarly communications and other areas. This presentation seeks to further connect theory to practical applications by illustrating how the (CCERL) impacted three librarians at the beginning, middle, and later</td>
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<td>10:45am –</td>
<td>Ethical Dilemmas in Collection Development of Open Access Electronic Resources</td>
<td>Highland Ballroom III</td>
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<td>11:45am</td>
<td><strong>Speakers:</strong> Amanda Echterling</td>
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<td>All across the nation, universities are being called into critical conversations about social justice. The ALA</td>
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<td>Code of Ethics calls on librarians to “uphold the principles of intellectual freedom” and “distinguish</td>
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<td>between our personal convictions and professional duties.” Our ethics shape our engagement in these critical</td>
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<td>conversations. In my presentation, I will address the ethical dilemmas raised in open access electronic</td>
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<td>resources from predatory journals, to article processing charges (APCs), to xenophobic collections. We will</td>
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<td>discuss how our professional ethics are applicable to and stretched by the goals of open access. Real examples</td>
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<td>of ethical dilemmas will be shared for open discussion.</td>
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<td>10:45am –</td>
<td>From Content Creation to Content Delivery: Partnering to improve e-book accessibility</td>
<td>Library</td>
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<td>11:45am</td>
<td><strong>Speakers:</strong> Melissa Fulkerson, JaEun Ku(Jemma), Jill Power, Emma Waecker</td>
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<td>Part I. We will discuss how publishers, aggregators, and libraries can partner to provide a better experience</td>
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<td>for users. We will discuss the consolidated results of a number of studies and audits of eBook accessibility,</td>
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<td>limitations and options for creating accessible PDF and EPUB eBook files, the real-life impact of these</td>
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<td>limitations on users, and what skillsets we can help to develop and disseminate to help close the gap.</td>
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<td>Part II. We will discuss the methods to assess accessibility of your eBooks, website or other electronic</td>
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<td>resources. We will look at both automated testing systems and usability testing. After this session we will</td>
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<td>have an understanding of how these two approaches can be leveraged to help optimize the research experience</td>
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<td>for your users.</td>
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<td>10:45am –</td>
<td>The Heart of the Cycle: How can Metadata 2020 improve serials metadata for scholarly communications and research?</td>
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<td>11:45am</td>
<td><strong>Speakers:</strong> Juliane Schneider</td>
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<td>Metadata 2020 is a collaboration that envisions a future with better metadata; not only increasing discoverability</td>
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<td>of content, but also benefiting reputation management, attribution, discoverability, efficiency, data</td>
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<td>reproducibility and reusability, in addition to future services that don’t yet exist! It aims to facilitate</td>
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<td>the collaboration of all in scholarly communications to consistently improve metadata to enhance discoverability,</td>
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<td>facilitate new services, and create efficiencies with the ultimate goal of accelerating scholarly discovery.</td>
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<td>Almost a year after launch, Metadata 2020 has gained considerable ground in gathering information from multiple</td>
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<td>community groups surrounding metadata challenges and opportunities to find ways to enhance metadata and find</td>
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<td>new solutions. Now that Metadata 2020 has received feedback and stories from all sectors of the research and</td>
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<td>scholarly communication cycle, we are targeting crucial points where metadata needs to work across all groups</td>
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<td>in order for a mature metadata model to become a useful reality.</td>
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<td>The Metadata 2020 Librarian Community Group seeks to conduct a workshop to narrow in on insights from serials</td>
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<td>metadata experts to:</td>
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<td>1. Better understand the current state of serials metadata</td>
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<td>2. Consider the flow of serials metadata between publishers, libraries, repositories and service providers,</td>
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<td>and how it could be improved</td>
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3. List the roadblocks that prevent smooth transition of serials metadata from one place to another
4. Develop recommendations for the groups within Metadata 2020 to consider (Library Group, Funder Group, Researchers Group, Publishers Group, Service Provider Group and Data Publishers/Repositories Group)

This session will use a roundtable and group discussion format, and will deliver a set of roadblocks and recommendations for improvement for Metadata 2020 to use in their goal of creating best metadata practices across the scholarly communications/research lifecycles.

10:45am – 11:45am  S **The Transfer Code of Practice: Overview and Updates**  
*Speakers: Jessie Copeland*  
The Transfer Code of Practice: Overview and Updates  
The Transfer Code of Practice is a NISO recommended practice and voluntary code for journal publishers containing best practices for transferring and receiving journals. The code helps publishers to ensure that journal content remains accessible by librarians and readers when there is a transfer between parties, and ensures that the transfer process occurs with minimum disruption. Publishers who register as Transfer-compliant are asked to endorse the Code, and to abide by its principles wherever it is commercially reasonable to do so.  
This presentation will briefly review the current activities of the Transfer working group, changes to Transfer, and a brief overview of the Transfer Alerting Service.

11:45am – 2:00pm  L **Lunch (on your own)**  
TBA

2:00pm – 3:00pm  E **Snapshot Session**  
*Speakers: Susan Davis, Travis Hewgley, Matthew Jabaily, Colleen Johnson, Courtney McAllister, Molly Rainard*  
1. Great Relationships: Priceless (Susan Davis)  
2. “Why don’t faculty use what we have?”: Integrating Technical Services into Liaison Activities (Courtney McAllister)  
3. Computational Reproducibility with Code Ocean (Travis Howard Hewgley)  
4. The UWI e Book Initiative (Colleen Johnson)  
5. Assessing Demand for Unsubscribed Titles with SerialsSolutions 360 Link and Google Analytics (Matthew Jabaily)  
6. Connecting Departments through License Review (Molly Rainard)

3:00pm – 3:15pm  K **Break**  
Grand Prefunction

3:15pm – 4:15pm  S **Bringing Social Justice Behind the Scenes: Transforming the work of technical services**  
*Speakers: Heidy Berthoud, Rachel Finn*  
Inspired by the excellent work of the MIT Libraries, I recently advocated for, and was successful in creating, a Diversity, Inclusion, and Social Justice Working Group at the Vassar College Libraries. I co-chair this group along with my colleague, Rachel Finn, and our membership represents a cross-section of library departments, and includes a mix of managers, administrators, and unionized staff.

Though our work is currently in the beginning stages, I am interested in developing a presentation for NASIG that looks specifically at ways in which values of social justice can be integrated into the day-to-day work of technical services. Frequently, social justice initiatives are thought of as activities belonging to outreach staff, or more public-facing staff; such initiatives exist alongside the daily work of librarianship rather than being fully
integrated within it. I think there are opportunities for this work to happen within the technical services sphere, but it requires taking a hard look at existing workflows and staff capacity. Much of technical services work is built around the idea of “efficiencies,” but what are we sacrificing in the name of efficiency? In the name of conveniences? In the zine librarian community (in which I am active) we have standards surrounding the idea of ethical acquisitions—what would that look like if it were to be developed for technical services more broadly? In the area of collections, how could we enhance diversity and inclusion by backing out of the big deal and/or approval plans? What would the impact on technical services departments be and how would we absorb that work? In the area of vendor performance, are we ready to sever ties with corporations that aren’t centering social justice in their own work?

Again, this work at Vassar is only in the early stages; however, this is a moment when Vassar College as a whole is looking very seriously at transforming the academic and residential life of our community through the work of the Engaged Pluralism Initiative. My hope is that we will be able to build on this momentum and contribute to positive changes in campus climate.

I would like the opportunity to speak about our process, enumerate our short-term goals, and talk more about our aspirations for bringing real change to existing department workflows.

3:15pm – 4:15pm  
**S Embedding Collective Ownership Into a Systems Migration**  
*Speakers: Paige Mann, Sanjeet Mann*  
A significant portion of all NASIG core competencies call for effective communication skills, project management, people management, and personal qualities such as tolerance for change, complexity, and ambiguity. But these competencies don’t come easy and may not be shared. So what can you do when called upon to lead your colleagues through a high-impact, stressful project like a systems migration?

Armacost Library at the University of Redlands recently completed a three-year migration project from Millennium to Primo/Alma that included three phases: strategic planning; vendor selection; and implementation of an ILS, discovery service, knowledge base and proxy server. Recognizing the challenges this posed for library employees, leaders of this smaller academic library structured the migration project to encourage collective ownership. Teams were carefully constructed to span departments and cross staff-librarian lines, recognizing individual strengths, weaknesses, power, position, and experience. Everyone was assigned to at least one implementation team, and often had a designated role (e.g., insider, outsider, communicator, etc.)

The resulting experience pushed employees (presenters included) well out of our comfort zones as we took risks and were vulnerable in front of each other. We experimented with new technologies, rebuilt our workflows and reimagined our roles, weathering unexpected challenges along the way.

This presentation will walk attendees through our library’s evolving efforts to build collective ownership into our migration infrastructure. Through purposeful decisions we managed multiple projects, supported colleagues, facilitated effective communication, and increased tolerance for change, complexity, and ambiguity.

3:15pm – 4:15pm  
**S Licensing by Design: A system(atic) approach**  
*Speakers: Michael Rodriguez*  
Electronic resources librarians are used to negotiating licenses that mitigate risk and maximize the ability of users to take advantage of content. But mostly we are not used to conceptualizing the work of licensing holistically, weaving licenses into our systems and workflows and sharing the processes and terms with our users and colleagues. This
presentation looks at licensing holistically through the lens of system design. We will focus on how license management takes place in our Ex Libris Alma next-gen system and how license terms are displayed to end users in our Primo discovery service. We will review testing, decision-making, and implementation processes for license management in these systems. We will give examples of how licensing impacts every part of the library organization. We will describe how we wrote policies and “answer keys” to explain terms of use in ways that faculty and students understand. We will discuss ways to educate staff and end users about the process of licensing and the ramifications of license terms. In the process we will discover ways to maximize our transparency and negotiating power. Attendees will leave this session with a holistic understanding of licensing as work that continues long after signature and that is integrated into library systems and workflows.

3:15pm – 4:15pm  **S Serials Clerk to Dean - 20 years with a head in the clouds**

*Speakers: Jeff Steely*

Twenty years ago the NASIG conference theme was "Head in the Clouds, Feet on the Ground." I was fortunate to attend, in my final term as a library school student, as one of the 1998 student award winners. I've been asked to share a bit about my path from serials clerk to dean. Whether that story provides some inspiration for career development or a cautionary tale about leaving serials for the dark side will be for you to discern.

3:15pm – 4:15pm  **S Using NASIG Core Competencies as a Framework to Develop Campus Support and Use of a New Institutional Repository**

*Speakers: Jennifer L. Pate*

How do you get started when your campus first adopts an Institutional Repository? What content and collections should you focus on first? How do you prioritize your campus partnerships? Who do you build rapport with first, faculty or students or administration? These questions, along with questions of copyright management, data management, metrics, and technical support, can overwhelm a new Scholarly Communication librarian. The combination of the relative newness and the lack of formal mentoring in our field can sometimes make it seem like you are fighting an uphill battle alone.

In August 2017, NASIG approved and adopted a set of core competencies that can serve as a roadmap for a new Scholarly Communications Librarian working to promote and build collections for a campus IR. This talk will address how to utilize the specific competencies to help target what items you should work on and when – how to get up-to-speed on what you need to know quickly so that you can effectively communicate your IR goals to your campus community as well as how to set short- and long-term competency goals. Using examples from her own ScholCom learning curve and campus IR set-up, this presenter will share her successes, lessons learned, and expectations for future IR growth on her campus.

4:30pm – 5:30pm  **M Members Forum**

Grand Ballroom II/III

6:00pm – 10:00pm  **D Dine arounds/Dinner on your own**

TBA

9:00pm – 11:30pm  **A Late night social**

Cascade
June 11 • Monday

7:00am – 8:45am  
T Breakfast  
Grand Ballroom I

9:00am – 10:00am  
S Applying Statistical Methods to the Library Data Analysis  
Speakers: Jia Mi, Yongming Wang  
Highland Ballroom III

Data analytics is a critical phrase in the life cycle of data management. One of the major techniques is using the statistical method, which is used by numerous enterprises and organizations all the time.

In our presentation, we will demonstrate our experiment with some traditional and popular statistical methods, such as Pearson correlation coefficient and linear regression, to analyze our library’s e-resources usage data. By using the statistical methods to analyze our data, we are trying to understand the real relationship between the different variables and forecast the future usage of our e-resource collections. Thus it can help us make effective decision in e-resource collection management and library budgeting. In this presentation, we will explain, in plain English, the terminology and usage of the seemingly daunting statistics and show that, with a little learning effort, everyone can master the concept and skill of the most useful technique of data analytics.

9:00am – 10:00am  
S Come Together: Interdepartmental collaboration to connect the IR and library catalog  
Speakers: Amanda Y. Makula  
Highland Ballroom I/II

While institutional repositories (IRs) often include a built-in searching mechanism and/or are indexed by web search engines, what about our patrons who go straight to the library catalog with their information need? Rather than hope that users will stumble upon the IR from the library website or assume that they will start their research with a Google search, librarians can facilitate greater IR discoverability and usage by integrating its content into the library catalog. With strong teamwork, good communication, and a shared vision, this endeavor helps transform the IR and library catalog from separate, siloed platforms into a more cohesive collections package.

At the University of San Diego, librarians and administrators across three departments -- Technical Services, Systems, and Archives / Special Collections / Digital Initiatives -- recognized this opportunity and came together to share information and work in concert to explore and enact the benefits of auto-harvesting IR content into the library catalog. Driven by a vision of providing enhanced discoverability and access, as well as promoting the IR as a whole and enriching the catalog, the team members worked cooperatively to identify specific IR collections appropriate for harvest, investigate technical logistics, consult outside vendors (including Innovative and bepress), and experiment with implementation.

9:00am – 10:00am  
S How We Talk About Assessment: A new framework for digital libraries  
Speakers: Caroline Muglia  
Highland Ballroom IV/V

Content reuse, or how often and in what ways digital library materials are utilized and repurposed, is a key indicator of the impact and value of a digital collection. Traditional library analytics focus almost entirely on simple access statistics, which do not show how users utilize or transform unique materials digital collections. This lack of distinction, combined with a lack of standardized assessment approaches, makes it difficult to develop user-responsive collections or highlight the value of these materials. This in turn presents significant challenges for developing the appropriate staffing, system infrastructure, and long-term funding models needed to support digital collections.

https://nasig2018.sched.com/print/all
The grant project, Developing a Framework for Measuring Reuse of Digital Objects, an IMLS-funded project (LG-73-17-0002-17) by the Digital Library Federation Assessment Interest Group (DLF-AIG), is working to address this critical area. The work has begun with an in-depth needs assessment of the Digital Library community to determine desired functionality for the construction of a reuse assessment toolkit. The development of well-defined functional requirements and use cases will serve as the building blocks of an assessment toolkit that goes beyond use, and focuses on transformation.

In addition to providing more information on the goals and methods of the grant project, this presentation will: illustrate the variety of ways digital library objects are being reused; share the results of the grant team’s work, thus far, including survey data analysis and in-person and virtual focus groups sessions. The presentation will conclude with the team’s early findings and will engage the audience to contribute their feedback on the project and deliverables.

**9:00am – 10:00am S**  
**MARC Metamorphosis: Transforming the way you look at eBook records**  
*Speakers: Jeannie Castro, Richard Guajardo, Matthew Ragucci, Melissa Randall*

The world of eBook records can be quite divergent, depending on the source of those records. In the past, most libraries downloaded records from OCLC, edited them and uploaded them to their local ILS. Today, some libraries carry on a similar process, but also receive records directly from the publishers. Other libraries get their MARC records from different vendors or choose to create them on their own. Depending on the source of the eBook, MARC record content and quality can vary greatly.

An engaging session about Metadata 2020 at the NASIG Annual Conference last year led us to wonder; is there a way to assess how libraries, publishers, and vendors are currently operating in this space for eBook records? While not as lofty as the aspirations of CrossRef, we wanted to take a look at what can be done in the short-term to improve metadata and cataloging workflows. Each presenter has a unique relationship with the "provide access" stage of the electronic resources life cycle and wanted to share their experiences on cataloging, standards, and workflows.

While presenter interactions are different, one common thread was quickly discovered; there is no standard experience in delivering MARC records to libraries. Furthermore, an examination of eBook records from across various community platforms also shows differences in record quality from different sources. This disparate experience between vendors and publishers causes frustration for libraries who strive for consistency in their local collections. As a result, they are forced to adopt specific cataloging workflows to accommodate. This could be rectified with a more unified approach. Creating a cross-industry dialog between libraries, publishers, and vendors about MARC record quality and maximizing workflow would certainly benefit all stakeholders.

The purpose of this presentation is to present comparative MARC data from two libraries with different cataloging practices. This data will be compared to a publisher’s cataloging practices and their plans for refining the experience. The outcome would be to suggest a set of best practices for what kind of records publishers and vendors should distribute to libraries, in order to increase eBook discoverability and drive usage. This multi-library/publisher partnership attempts to examine these differences and posit suggestions for areas of collaboration and improvement. We hope that this presentation will help further that conversation and transform the way you look at eBook records.

**9:00am – 10:00am S**  
**The Scholarly Commons**  
*Speakers: Maryann Martone*

The Scholarly Commons working group has been engaged in a synthesis activity over the past two years to survey the existing sets of charters, principles and best practices and tools to try to knit them together into a coherent vision and set of practices for scholarly communications.
Based on this work, we’ve concluded that the Future of Research Communications and e-Scholarship is, indeed a FAIR, Open, Research-object based, Citable Ecosystem that we call the scholarly commons. The principles of these scholarly commons (https://www.force11.org/scholarly-commons/principles) define ways to practice open, inclusive and reproducible science and scholarship. They can function as an agreement among researchers and other stakeholders in scholarly communication to make research open and participatory for anyone, anywhere.

Two questions arise: Do we have such an ecosystem already? If so, can we also provide concrete guidance on how to work within it?

At a workshop in Sept 2016, it was proposed to address these questions by creating a series of decision trees that would help in making research objects Open, FAIR and Citable. These decision trees are both forward and backwards looking. That is, they define a set of practices that makes research objects maximally commons compliant. But they also define practical paths for those who are interested in getting started today working with existing artifacts or with limited resources. In these cases, we want to guide people to make the best possible choices given certain contexts. Here we propose to present an introduction to the scholarly commons and present a few (3?) of the decision trees. In building those decision trees we encountered many problems related to trying to use the currently available infrastructure for scholarly communication (archives, journals, repositories, review and commenting systems, ID-systems, linking mechanisms and more) to provide guidance on working in a commons compliant way. We will discuss some of the choices we made and would like to have an active debate on research practices and activities for which commons compliant options have yet to be developed.

The format we envision is either a presentation/demonstration (e.g. 25 minutes) with extensive discussion (also 25 minutes?) or a full session were we invite other speakers as well. The latter could be representatives from organisations that are identifying themselves as commons (e.g. OSF and Humanities Commons), but perhaps also a representative of underlying infrastructure (e.g. ORCID or Crossref) or a proponent of distributed solutions (using e.g. blockchain and the IPFS). Such a full session could take the format of 3-4 short presentations of 10 minutes on each representative’s take on what the scholarly commons is, followed by discussion on ways forward to make scholarly communication more open, efficient and fair.

### Vision III: Lisa Macklin - Open Access: How Accessible Is It?

**Speakers:** Lisa Macklin  
**Title:** Open Access: How Accessible Is It?

Abstract: The Budapest Open Access Initiative made the first public statement of open access principles in 2002. In the more than 15 years since, open access publications have proliferated. The ideals of the open access movement to make open access the default method of sharing research, however, have not yet been fully realized. In this presentation, Lisa will examine where we are in the open access movement; the successes we can celebrate and the challenges still to be overcome. She will also posit that we may have reached a moment in the open access movement when it is time to expand on our conception of open access and consider accessibility more broadly. Librarians have been central players in the open access movement, but is there more we could or should be doing? Should we broaden our definition of access to be more expansive and include accessibility? As we close the conference, we’ll consider ways we can all contribute to making open access more accessible.

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<td>11:30am – 12:00pm</td>
<td>Closing Remarks</td>
<td>Grand Ballroom II/III</td>
</tr>
<tr>
<td>12:30pm – 1:30pm</td>
<td>B Board Meeting</td>
<td>Library</td>
</tr>
</tbody>
</table>