

PIE-J Standing Committee Review Report

The NISO PIE-J Recommended Practice was published in March 2013 and was immediately well received with over 1,000 downloads of the full document and two brochures in the first two weeks post publication. Shortly thereafter a Standing Committee was formed with the following charge:

The PIE-J Standing Committee will: continuously promote the PIE-J Recommended Practice, nationally and globally [in large part by encouraging librarians to contact publishers and e-journal providers to bring the guidelines to their attention but also through other formal and informal means]; respond to specific inquiries about PIE-J; gather comments and information to assist with the 24-month review.

This report summarizes the work the Standing Committee (henceforth “the Committee”) has completed to date and communicates the Committee’s recommendations to the NISO Business Information Committee.

Promoting PIE-J

The Committee actively promoted and marketed the PIE-J Recommended Practice following its publication. Committee members gave presentations at numerous national and international conferences, including the annual conferences of NASIG, ER&L, ALA (Mid-winter), Charleston, Society of Scholarly Publishing, and the UKSG. Committee members spoke about PIE-J at a NISO Open Teleconference in both 2013 and 2014. Other marketing events included talks and brochure distribution at the Program for Cooperative Cataloging, the National Library of Medicine, the O’Reilly TOC for Publishers Conference, and a World Bank staff webinar. While the primary marketing audience was e-journal publishers who design and create the e-journal platforms, the Committee also actively communicated with librarians to encourage their familiarity with the PIE-J guidelines.

Committee member Regina Reynolds published a journal article entitled “PIE-J, Presentation and Identification of E-Journals: what’s the point?” in Insights (a UKSG publication) in November 2013. A link to the article was posted on the NISO PIE-J webpage and also distributed via email discussion lists.

To encourage librarians to contact publishers and e-journal providers about the PIE-J guidelines, the Committee created a customizable template letter with suggested wording. A link to the template was added to the NISO PIE-J webpage and widely distributed via email discussion lists and publications such as the ALPSP Newsletter and the newsletters of ALCTS, NASIG, NISO (Newslines), ISSN International Centre, and UKSG. As of October 21, 2015, the template letter had been downloaded 636 times.

Soliciting Feedback and Responding to Inquiries

The NISO PIE-J webpage was revised to provide email addresses for all Committee members and to invite interested individuals to contact any member with inquiries or comments. Two email inquiries were received. One was a straightforward question from a publisher that was answered. The other was reported by a librarian and concerned a problem with a lack of title history on the website for the journal BMJ. The Committee drafted a letter with suggested changes and sent it to the Publishing Director at the BMJ Head Office in London, but never received a response. On two occasions the Committee distributed messages to a wide variety of appropriate lists and newsletters, informing readers about upcoming presentations and inviting feedback about PIE-J. Unfortunately, even though in every case presenters reported that their audiences were interested in what they heard and asked good questions, no additional online feedback or inquiries were received by members of the Committee.

The Committee did hear from a librarian who was working with Sage to provide that publisher with title histories and bibliographic information. Sage has since embarked on a large project to align its e-journal presentation with the PIE-J guidelines. Lettie Conrad (Executive Manager, Online Products, SAGE) presented this project together with Steve Shadle (PIE-J Standing Committee member and Serials Access Librarian at the University of Washington) at the 2014 Charleston conference. A synopsis from the conference program is available here: <https://2014charlestonconference.sched.org/event/71c0419a6529f24af46fa0e4073dd87a#.VfMNKpfMmao>. The presentation was well received.

Gathering Information for the 24-Month Review

In March 2015 the Committee created and distributed a survey to gather information about whether and how the PIE-J guidelines are being used. The survey was intended to solicit comments and information to help the Committee with its 24-month review. A copy of the survey questions is attached as an appendix.

A total of 198 people responded to the survey. Of those who responded:

- 17% represented vendors or publishers:
 - o 88% had reviewed the PIE-J guidelines
 - o 69% had compared their e-journal presentation to the PIE-J practices
 - o 53% had already made or planned to make changes to their online platform using the PIE-J Recommended Practice. Among those respondents who indicated that their organizations were not making any changes, reasons given were lack of resources and, in several cases, that they felt they were already in compliance
- 83% were librarians
 - o 65% indicated that they had reviewed the PIE-J guidelines
 - o 13% had contacted publishers or vendors with the template letter the Committee created and posted on the PIE-J website

The Committee members found this feedback encouraging and discussed the respondents' comments. One comment suggested that PIE-J include a template to aid the way e-journals are presented. The Committee felt strongly that it was best to avoid making specific design suggestions, leaving design decisions to the publishers and vendors. Another comment suggested the Committee critique the examples in Appendix A. Doing this would be problematic because publishers and vendors would likely not grant the Committee permission to use screenshots of their websites if the intent was to point out faults in their e-journal presentation.

In addition to gathering outside information, the Committee reviewed and discussed each section of the Recommended Practice, including the Foreword and Introduction. Ideas for minor edits were discussed. However, in the end the Committee decided that none of the suggested edits from either the internal Committee review or the external feedback represented a level of change that would warrant a revision of PIE-J. A list of minor edits discussed by the Committee was compiled and mounted on the Committee's NISO workspace for future reference.

Committee Recommendations

As of October 21, 2015 the full document of the PIE-J Recommended Practice had been downloaded 9,007 times, the electronic brochure 3,152 times, and the print brochure 1,827 times. The PIE-J Recommended Practice is a useful document that does not at this time require any major changes. The Committee recommends that:

1. PIE-J be re-affirmed as a NISO Recommended Practice
2. The Committee remain active as a resource for publishers/providers and librarians, and to continue promoting and monitoring PIE-J.

Respectfully submitted,

Sally Glasser and Edward Cilurso
Co-Chairs, PIE-J Standing Committee
October 21, 2015

Sally Glasser
Serials/Electronic Resources Librarian
022B Axinn Library
123 Hofstra University
Hempstead, NY 11549
Sarah.Glasser@hofstra.edu
516-463-5959

Edward A. Cilurso
Vice President – Production
Taylor & Francis
530 Walnut Street – Suite 850
Philadelphia, PA 19106
Edward.Cilurso@taylorandfrancis.com
215-606-4220

Appendix
PIE-J Standing Committee Survey Questions

Q1: Are you a vendor, publisher, or librarian?

Questionnaire logic was used to have vendors and publishers proceed to different questions. If Q1 was marked as vendor or publisher, the following questions appeared:

Q2: Have you reviewed the PIE-J Recommended Practice?

Q3: Have you or anyone in your organization compared your e-journal presentation to the best practices outlined in PIE-J?

Q4: Have you made or do you plan to make any changes to your online platform using the recommended practice?

Q5: If you have not and do not plan to make any changes, what are the barriers that have kept you from taking such action?

Q6: Do you find the appendices in the PIE-J Recommended Practices useful?

Q7: Are there any additional appendices you would like to see?

Q8: Are there any important issues not covered in PIE-J that you would like to see included?

If Q1 was marked as librarian, the following questions appeared:

Q2: Please specify your area of librarianship (selections were Acquisitions, Cataloging, Reference, Collection Development, Serials, Other)

Q3: Have you reviewed the PIE-J Recommended Practice?

Q4: Have you contacted any publishers or vendors about PIE-J (using our letter template or not)? If yes, please describe the results:

Q5: Do you find the appendices in the PIE-J Recommended Practices useful?

Q6: Are there any additional appendices you would like to see?

Q7: Are there any important issues not covered in PIE-J that you would like to see included?