2020 Membership Meeting
NISO Annual Report of 2019 Activities

Todd Carpenter
Executive Director, NISO
NISO Annual Meeting Webinar
June 26, 2020
2020 Membership Meeting Overview

• A year of changes
  – The Merger of NISO and NFAIS
  – Changes because of the merger
  – NISO Strategic Plan
• NISO Plus 2020
  – NISO Plus 2020 Goals and Outputs
  – Plans for NISO Plus 2021
• NISO Membership
• NISO Finances
• NISO Standards Program
• Open discussion of NISO activities
Elements of the Vision

- Merry the convening with the practical
- Expand the participation and engagement
- Invigorate the development work
- Dedicate specific resources to thought leadership
- Rationalize our programming
- Reduce overhead and pass some of savings back to the membership
Welcome new staff to NISO in 2019!

Alice Meadows
Director of Community Engagement

Alice Meadows is NISO’s Director of Community Engagement, responsible for engaging with and developing our member community. She handles member communications, marketing, and outreach activities, as well as helping ensure our sustainability through growth in membership, sponsorship, events, and other funding sources. Alice was formerly Director of Communications and Director of Community Engagement at ORCID; before that, she worked for many years in scholarly publishing, including at Wiley and at Blackwell Publishing. Alice is an active member of the information community, having served twice on the Board of the Society for Scholarly Publishing, as well as on the Council of the Association of Learned & Professional Society Publishers. She is a regular contributor to The Scholarly Kitchen and other industry blogs, participates in numerous industry initiatives, and speaks and writes widely on scholarly communications topics. Alice received the SSP Distinguished Service Award in 2018, the ALPSP Award for Contribution to Scholarly Publishing in 2016, and the ISMTE Recognition Award in 2013.

Jason Griffey

Griffey has written extensively on technology and libraries, including multiple books and a series of full-periodical issues on technology topics, most recently AI & Machine Learning in Libraries and Library Spaces and Smart Buildings, Technology, Metrics, and Iterative Design from 2018. Named a Library Journal Mover & Shaker in 2009, Griffey has written and spoken internationally on topics such as artificial intelligence & machine learning, the future of technology and libraries, decentralization and the blockchain, privacy, copyright, and intellectual property. In 2018, Griffey delivered the Glorianna St. Clair Distinguished Lecture in 21st Century Librarianship for the Carnegie Mellon campus in Education City, Qatar. A full list of his publications and presentations can be found on his CV.

He is one of eight winners of the Knight Foundation News Challenge for Libraries for the Measure the Future project, an open hardware project designed to provide actionable use metrics for library spaces.

Griffey is the creator and director of The LibraryBox Project, an open source portable digital file distribution system. He can be stalked obsessively online, and spends his free time with his daughter Eliza, reading, obsessing over gadgets, and preparing for the inevitable zombie uprising.
New NISO Board of Directors

- Resulting from the merger agreement, the NISO Board of Directors approved a few bylaws changes to align NISO & NFAIS in April 2019.
- Board grew from 13 to 15 members on July 1, 2019
- Requirement added that Board should be affiliated with members of NISO
Our Vision
Our Vision

NISO’s vision is a world where all benefit from the unfettered exchange of information.
Our Mission
Our Mission

The mission of NISO is to build knowledge, foster discussion, and advance authoritative standards development through collaboration among the cultural, scholarly, scientific, and professional communities.
NISO’s Strategic Goals
Theme: Diversity & Inclusion

NISO is recognized for connecting diverse stakeholders
Benefit from our diversity
Theme: Trend Setting

NISO drives thought leadership and innovation
Setting trends
Theme: Standards Development for Content & Technology

NISO’s standards and recommended practices make information exchange more efficient through collaborative solutions.
More Efficient With Standards
Theme: Community Development

NISO nurtures an engaged, inclusive, and sustainable community
Active, sustained, and healthy
NISO+PLUS 2020
ENVISION + INNOVATION
What were we trying to do?

Generate Ideas
What were we trying to do?

Generate Ideas
Practical Solutions
What were we trying to do?

Generate Ideas
Practical Solutions
Focus on Value
Together to engage, not just listen
What do we do on Wednesday?
NISO Plus 2020 — Outputs and Next Steps

Introduction

The inaugural NISO Plus conference took place in Baltimore, MD on February 23-25, 2020. Following the merger of NFAIS and NISO in 2019, our goal was to combine the thought-leadership tradition of the former NFAIS conference with the hands-on practicality of NISO. The conference brought together around 250 professionals from across the information community — librarians, publishers, service providers, and more — to focus on our shared challenges and opportunities through a combination of presentations and in-depth discussions, culminating in concrete next steps for NISO and our community.

The NISO community consists of stakeholders from all parts of the information landscape, who cooperate to create consensus industry standards and recommended practices, which support better interoperability and communications in scores of different types of technical interactions. The NISO working group process itself is seen as a fruitful learning experience that enables participants to better understand each others’ requirements and motivations, leading to practical outcomes that meet the needs of all stakeholders. NISO standards and recommended practices result in increased efficiencies across diverse supply chains, improved communications and trust between stakeholder groups, and support for innovation and growth in the information services sector.
Mark Your Calendars Now!

NISO 2021

Baltimore, MD -- February 21-23, 2021

GOING VIRTUAL-FORWARD
Did You Know About NISO IO?

https://www.niso.org/niso-io

NISO Information Organized

In This Issue

Information Industry Awareness  Brief Take Aways  Hypermedia  Trends and Traditions  Research & Documentation

Building Knowledge  Resource Pages

Information Industry Awareness

We Need to Focus on the “Why” of Standards

Because standards reduce costs. They increase efficiency. They build trust which saves time.

Read More

NISO Statement on the Protests in America and Social Justice

Committed to helping achieve diversity, equity, and inclusion, NISO stands with all individuals and organizations sharing those goals.

Read More

NISO Community Survey

Help us understand how we should be prioritizing our efforts to engage with our community in the future.

Read More

About IO

NISO is where content publishers, libraries, and software developers turn for information industry standards that allow them to work together.

Most Recent

Tweet

Chan Zuckerberg Initiative Awards $2 Million to medRxiv

June 19, 2020

Tweet

New CEO and Executive Director of AGU To Arrive in August

June 12, 2020

Short Hit

NISO Webinar, No More Big Deal, Has Been Rescheduled for July 6

June 09, 2020
Membership Report
Membership Trends 1998-2019

NISO MEMBERSHIP 1998-2019

- LSA Members
- Voting Members
Stable Membership Trends
Currently 98 Voting Members and 123 Library Standers Alliance Members

**Four** new NISO Voting Members in 2019/2020
- Wolters Kluwer
- Bibliolabs
- Cadmore Media
- International ISSN Centre

NISO added 18 formerly NFAIS-Only members

**Three** Non-Renewals of NISO Voting Members
- Inera
- Code Ocean
- University of California Press
LSA Membership Trends

Modest decline (-9) in LSA Membership in 2019
Continuing a steady trend in past several years

Currently 123 LSA Members (as of June 2020)
Two new in 2020 (so far), but 6 non-renewals in 2020
Net -14 non-renewals since 2018
Merging memberships

• NFAIS was on a July->June fiscal year, while NISO is January->December
• NISO-only & NFAIS-only members, stable member rates in 2019 and 2020
• Members who had been members of both saw reductions in their combined membership dues
Merging Membership - Next Steps

• Reviewing membership
• Inconsistencies of membership rates within organizations
• Lack of continuity between rate levels between NFAIS and NISO
• Plans to convene a membership dues review committee to rationalize this.
• Then COVID-19...
Report of NISO Finances
Merging memberships

June 26, 2020

2020 NISO Annual Membership Meeting

STATEMENT OF ACTIVITIES
National Information Standards Organization
For the Year Ended December 31, 2018

<table>
<thead>
<tr>
<th>SUPPORT AND REVENUE</th>
<th>Without Donor Restrictions</th>
<th>With Donor Restrictions</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership Dues</td>
<td>$ 773,303</td>
<td>$</td>
<td>$ 773,303</td>
</tr>
<tr>
<td>Grant Income</td>
<td>-</td>
<td>197,372</td>
<td>197,372</td>
</tr>
<tr>
<td>Workshops</td>
<td>121,035</td>
<td>-</td>
<td>121,035</td>
</tr>
<tr>
<td>Publications Revenue</td>
<td>3,322</td>
<td>-</td>
<td>3,322</td>
</tr>
<tr>
<td>Investment Return, Net (Note 2)</td>
<td>(26,358)</td>
<td>-</td>
<td>(26,358)</td>
</tr>
<tr>
<td>Net Assets Released from Restrictions</td>
<td>68,329</td>
<td>(68,329)</td>
<td>-</td>
</tr>
<tr>
<td>Total Support and Revenue</td>
<td>939,631</td>
<td>129,043</td>
<td>1,068,674</td>
</tr>
</tbody>
</table>

EXPENSES

Program Services:

- Publications: 87,401
- Standards Development: 160,027
- International: 94,073
- Education: 199,487
- Membership Services: 56,944

Total Program Services: 597,932

Supporting Services:

- Governance: 93,878
- General and Administrative: 203,031
- Fundraising: 128,941

Total Expenses: 1,023,782

Change in Net Assets: (84,151) 129,043 44,892

NET ASSETS - BEGINNING OF YEAR: 133,929

NET ASSETS - END OF YEAR: $ 49,778  $ 129,043  $ 178,821
Financial trends 1998-2018
Report of NISO Standards Work
2019 Standards Completed

  - Published, April 8, 2019

  - Published, April 15, 2019

  - Published, June 21, 2019

  - Published, July 1, 2019

- **NISO Adopted the JATS4R (JATS For Reuse) Project and published the JATS4R recommendations as NISO Recommended Practice**
2019 - New standards projects

• Improve Communication Around Content Platform Migrations
• Taxonomy, Definitions, and Recognition Badging Scheme
• Standards-Specific Ontology Standard (SSOS)
• Findability of Video and Audio Outputs from Scholars
• Revision of Indexing Standard (ANSI/NISO Z39.4)
New Standards Ideas Under Discussion

- PROJECTS UNDER DISCUSSION:
  - NISO PLUS 20 Outputs Ideas
  - Open Access Focus Group
  - Linked Data Focus Group
  - Revision to Access and License Indicators
  - Revision to NISO Library Binding Standard
  - Revision to Journal Article Versions
  - Collaborative decision making interoperability framework

- JOINT INITIATIVES:
  - SeamlessAccess
  - Public Library Data Alliance
Grants Received

• Completed work on grant from the Alfred P. Sloan Foundation for open source implementation of MathML in the Chromium Web Browser
  – In partnership with Igalia

• 2020 Diversity & Inclusion Grant from Sloan Foundation to support scholarships to attend NISO Plus 2020
NISO & COVID-19

• Currently
  – Providing expanded webinar registrations
  – Hosted a free webinar on responding to crisis
  – Cancelled two spring in-person events
  – Moving fall events to virtual footing for Humanities Roundtable
  – Planning for virtual-forward event for Plus 2020
  – Cancelled all 2020 travel
Looking forward to 2021

• The COVID-19 pandemic is putting significant pressure on our community in a way that the 2008-09 financial crisis didn’t
• We’re already seeing organizations telling us they won’t be renewing in 2021
• Significant budget impacts at member organizations
• Uncertainty about NISO Plus 2021
Open Discussion

Questions / Comments
Thank you!
Please reach out!

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