Blue Ribbon Panel Advises NISO on Strategic Direction

The information environment in which NISO operates is in a period of unprecedented change. In parallel with these changes, the whole environment for standards development and deployment has evolved rapidly in recent years. To ensure that NISO evolves in an optimal manner to maximize its opportunities, and to build on its historic strength as a neutral zone for creating cross-community standards, in 2004 the NISO Board of Directors launched a review of NISO’s goals, objectives, and the organizational, financial, and leadership structures and processes appropriate to achieving them. This work will result in a strategic and business plan.

The Board began the planning process with an environmental scan and solicited input through surveys of the NISO voting members and telephone interviews with key stakeholders and thought leaders within NISO’s community.

To engage a broader discussion and obtain an external evaluation of the organization, NISO convened a blue ribbon panel of thought leaders in the communities that NISO serves. Funding support for the panel was received from the Andrew W. Mellon Foundation. Clifford Lynch (Executive Director, Coalition for Networked Information) was appointed Panel Chair and worked with the Board to identify additional members. Panel participants were: Lorcan Dempsey (Vice President of Research, OCLC, Inc.); Karen Hunter (Senior Vice President, Elsevier); Ron Larsen (Dean, School of Information Sciences, University of Pittsburgh); Sarah Ann Long (Director of the North Suburban Library System); Deanna Marcum (Associate Librarian for Library Services, Library of Congress); Eric Miller (Semantic Web Activity Lead, World Wide Web Consortium); Diana Oblinger (Vice President for EDUCAUSE); Kent Smith (Retired, former Deputy Director, National Library of Medicine); Jenny Walker (Vice President of Research, OCLC, Inc.); and Ann Wolpert (Director of Libraries, Massachusetts Institute of Technology).

The self-governing panel convened in late 2004 and completed their report in April 2005. The NISO Board of Directors reviewed and discussed the report and documented their response. This article includes summary extracts for both reports. The full reports are available on the NISO website.

Download copies of the Blue Ribbon Panel report and the Board response at: [http://www.niso.org/members/secure/StrategicPlan.html](http://www.niso.org/members/secure/StrategicPlan.html)
Blue Ribbon Panel Report Summary

NISO has played an important role in the support of libraries and other organizations that interact with them; as automation and digital content have become increasingly important for libraries, standards play an ever more central role. Over the past decades, NISO has accomplished a great deal with seriously constrained resources. Historically, NISO’s constituencies, products, and values have nearly always been clear (though perhaps not always clearly articulated).

However, the panel is in complete agreement with the NISO Board that the organization is now at a crossroads; the changes in the standards landscape and in the characteristics of NISO’s historic constituencies are now so significant that a fundamental strategic review is both required and urgent. There are new needs, new opportunities, and new calls on resources.

NISO Constituencies and Relationships

Historically, NISO’s constituency has centered on libraries and the organizations that provide them with content and services such as publishers, abstracting and indexing organizations, and library automation vendors. One way to characterize the problems that NISO faces in using this traditional view of constituency is that the boundaries of libraries have become ever more indistinct and permeable. While libraries of all kinds once were relatively independent, an academic research library today, for example, is deeply involved in and dependent upon the infrastructure and standards choices of its parent university, and of the research and higher education world as a whole; and an academic research library is also inextricably involved in standards developments related to data and information management in the scholarly disciplines that it supports. In addition, there has been a huge rise in “dual-use” content-oriented technical standards which are relevant to both library and consumer marketplaces; often the library marketplace is tiny relative to the consumer marketplace but expresses many specialized needs in the standards process. NISO needs to grapple with these changes in determining the scope and nature of its constituency, in how much to extend it from libraries to their parent organizations, in how to scope the now enormous range of content and service providers.

A fundamental question that NISO needs to consider is the extent to which it operates in the “public interest” as opposed to the extent to which it is driven by the priorities and interests of its member organizations directly and exclusively. One important perspective that emerged from the planning panel discussions was the role of NISO as a builder of communities of common interest, not just around standards but around applications of technology that involved standards; the Metasearch Initiative was cited as an example of such an activity. It is clear that a greater emphasis on this kind of community building could be a way forward for NISO in terms of creating value for its members, and also in serving a public interest mission.

The role of libraries in NISO deserves some particular focused consideration. Historically, libraries have been the connecting theme in the portfolio of standards developed by NISO; most of the standards are used either by libraries, or, more commonly in recent years, by various kinds of vendors supplying systems to libraries, or doing business with libraries. From a participation perspective, individual libraries have played a very small role in the NISO membership. This leads to two key strategic challenges. The first is how to get an appropriate share of support from the library (and perhaps higher education) sector under the assumption that they are not going to join individually in large numbers—and indeed what such a share should be. The second is how NISO wishes to engage these non-member or indirectly-represented libraries as part of NISO’s ongoing programs, particularly under the community-building scenarios discussed above.

NISO’s recent shift to having an explicitly dual character as a national and international organization also raises constituency questions; the planning panel is somewhat surprised that the tension between these two roles has not caused more problems to date. NISO has some specific responsibilities to represent the interests of the United States in various international standards activities, giving rise to a potential conflict of interest. Particularly in light of the fact that NISO gets little or no financial support from the US Government to represent these positions, to the best of our knowledge, it might make sense to plan to transition them to an explicitly national entity like the Library of Congress before the potential conflict becomes a real one.

It is the strong view of the planning panel that a good deal of what NISO does is so important that if NISO did not exist, or ceased to exist, that various parties would find it necessary to create some organization, or task some existing organization, to fill the functions. The problem is that NISO has historically not been very effective at balancing the level of resources from the various interested constituencies with the level of resources necessary to support various activities. As NISO evolves, it will likely need to stop doing various things on the basis that these things are not cost-effective or not affordable, or are not a high priority for NISO even though some community is prepared to underwrite them. Careful thought needs to be given to how to distinguish the two cases, and how to transition the work elsewhere if there is a community prepared to support it.
Relationships with Other Standards Organizations and Sectors

Turning from NISO’s direct constituencies to NISO’s relationships with other organizations and sectors, the planning panel’s comments begin with a call for much greater clarity about the character and cost of such relationships, and greater specificity about what kinds of relationships are under discussion. One can certainly identify good examples (and missed opportunities) for actual joint standards development. Here the issues include persuading the potential partner(s) that NISO has something to offer in a joint undertaking to justify the complexity of the effort. In the areas of co-ordination and cross-referencing, the issues are one of mechanism and in some cases getting the other organizations to pay attention and cooperate. In particularly strategic cases of ongoing collaboration, one might imagine the use of mechanisms such as reciprocal board appointments between NISO and the other organization. And we should recognize that because of the diversity of the NISO membership and constituency, and because of the public interest element in its mission, there will be cases where NISO shares a common interest in a standards area with other standards-making or quasi-standards-making groups that may have a more homogeneous membership, but there is such a fundamental conflict of values between NISO and the other group that effective cooperation is virtually impossible.

There seem to be some particularly compelling opportunities for collaboration with the extensive set of standards and quasi-standards organizations active in the learning management and support area that we urge the Board to explore on a priority basis.

It is also reasonable to prospect for sectors directly adjacent to NISO’s existing efforts that do not have effective or sufficiently comprehensive standards-making mechanisms and where there is an emerging demand for more standards development support. We believe that preservation—and particularly the complex of issues around digital preservation, archiving and curation—is one of the few truly promising areas. Similarly, there is a broad area around digital content management, digital libraries (as information management services) and related systems which also seems promising to the panel and worthy of a detailed, careful, critical analysis.

NISO and the Changing Standards Lifecycle

Without attempting a comprehensive analysis of the changing standards lifecycle here, the committee identified three key trends that have broad implications for NISO.

First, there is now a great deal of pre-standards activity, often including test beds, proof of concept implementations, the development of mature specifications documents within limited communities and the like that takes place before a standard-to-be enters the committee and voting processes. Much of this often takes place outside of NISO auspices.

Second, there is a very complex process of consensus building, problem framing, and decomposition, and development of functional requirements and use cases leading up to creation of standards or proto-standards. In a few cases, such as the metasearch effort, NISO has actively organized these processes; in other cases, they have taken place elsewhere.

Third, and finally, success in standardization is no longer the publication of a document. Standards have long maintenance tails, associated registries, and other maintenance activities that are an essential part of their ongoing support, development, and deployment. NISO historically has usually used a maintenance agency mechanism to deal with the issues around the standard proper such as registries and updates. It seems likely that NISO will have to dedicate more resources to support of standards after publication, and move away from a mentality that equates publication with completion of a standards project.

Four other areas related to the standards lifecycle and the standards development process deserve comment.

The first is the role of NISO staff as opposed to volunteer standards committee members in the standards development process. Historically, NISO has relied heavily upon volunteers; while this has kept direct costs to NISO to a minimum, and meant that those organizations most directly interested in developing the standard paid more in direct expenses to see it developed, it has also meant that NISO had limited control on timetables and other matters related to the development of the standard.

Second, in making decisions to proceed with standards work the panel believes it is essential that NISO realistically understand and evaluate the motivations, marketplace positions, and alignments of potential players.

Third, as the world moves away from a publication-oriented standards process, NISO needs to recognize that there are real disadvantages to a multiplicity of standards committees being continually launched and discharged, and a highly granular approach to standards development.

Finally, NISO has to come to terms with the realities of finite resources and the prioritization of these resources within the standards development process in much more explicit and pragmatic ways.

NISO Organizational Strategies and Business Practices

There was general agreement that NISO cannot do the work it needs to do today at current levels of staff and resource. One question that needs to be analyzed is whether it is possible to generate sufficient resources from a membership base that is roughly the size of the
current one. If the answer is no, then the NISO board must do one of two things: either figure out how to make sufficiently more of the actual constituency organizations become dues-paying members (which the panel believes is likely to be extremely difficult), or develop a plan for NISO which involves only a very small number of critically important standards and a very limited and highly focused set of relationships with other standards efforts. The panel believes that it is more important to do the few but most important things well than to try to be comprehensive but lack the resources to be effective.

It is frequently observed that today’s NISO is a small stand-alone organization, and the question is often asked whether it is so small that it has fallen below critical mass given the realities of today’s standards landscape. The planning panel did consider this question, and indulged in some speculation about whether NISO might merge into some other organization, obtaining better infrastructure support and perhaps some subsidy and/or advantage from economics of scale.

In Conclusion
We believe that NISO must take three sets of actions, in this order:

1) Define the NISO constituency for the future and articulate the way that NISO will relate to that constituency.

2) Develop a well-synthesized framework that looks at the needs and priorities of that constituency, the technical standards landscape relevant to that constituency, and the ecology of other standards-related organizations relevant to that constituency. From this will follow a roadmap and priorities for standards development and for partnerships, collaborations, and other relationships with other players.

3) Deal with resource and funding constraints and needs.

In concluding, we want to reiterate our comments about the continued strategic importance of NISO’s work to a broad range of what we might term (in deference to the open questions about membership and constituency) “interested parties” or perhaps “stakeholders” or just “vitaliy interested parties”: libraries, publishers, higher education institutions, systems developers and suppliers, and indeed the broad public that makes use of libraries or information services. We urge the NISO Board to make clear and decisive choices that will ensure NISO’s continued ability to be as responsive as possible to the needs of these constituencies, but most importantly to ensure its continued viability.

NISO Board Response Summary

Current members of NISO’s Board of Directors are: Jan Peterson, Chair (Infotrieve); Carl Grant, Vice Chair/Chair-Elect (VTLS, Inc.); Beverly P. Lynch, Immediate Past Chair (UCLA Graduate School of Education & Information Studies); Michael J. Mellinger, Treasurer (Davandy, LLC); Patricia Stevens, Chair of SDC (OCLC, Inc.); Patricia R. Harris, Executive Director / Secretary NISO; and Directors: Douglas Cheney (Barnes & Noble, Inc.); Brian Green (BIC/EDItEUR); Daniel Greenstein (California Digital Library); Deborah Loeding (The H. W. Wilson Company); Richard E. Luce (Los Alamos National Laboratory); Robin Murray (Fretwell-Downing Informatics); James Neal (Columbia University); Oliver Pesch (EBSCO Information Services); and Eric Swanson (John Wiley & Sons, Inc.).

The Board of Directors of the National Information Standards Organization gratefully acknowledges the work of the Blue Ribbon Panel it commissioned. The fact that such an impressive roster of community leaders agreed to participate in NISO’s strategic planning exercise is an indication of the continuing importance of standards to the information world that NISO serves, and an acknowledgement that if NISO did not exist that some sort of standards body would need to fill its place. The Panel’s Report advises the NISO Board to take three actions. Key themes also stand-out in the Report and the Panel offers a number of important observations, suggestions, recommendations, and ideas. In this Response the Board will first address the three key conclusions. Then we will comment on the related topics that the Panel brought forward that are germane to NISO’s strategic development.

Action #1: Define the NISO Constituency – The Panel’s report pointed out the disparity between NISO’s core membership and the much-larger constituency that NISO’s work serves. This gap is not unusual in the standards development community. It is one of the core realities of the standards world that the beneficiaries of standardization are a much larger community than the dues-paying membership of the standards developing body.

Created in 1977, NISO brought together three distinct sectors: library, publishing, and information technology. A deliberate decision was taken to establish NISO as an independent entity rather than harboring the organization within one of the major professional organizations that served the communities. We see today that in this digital age the boundaries between NISO’s original constituencies are becoming increasingly blurred. As the traditional barriers between libraries, publishers, and users continue to break down, the interdependences of the rapidly evolving information landscape are exposing a common need for standards that will ensure the effective creation and interchange of persistent information.
The Board is conducting a review of the Products and Services that NISO produces: products such as formal Specifications, White Papers, and Best Practices; and services such as education and standards maintenance. A focus on what NISO does rather than who NISO serves allows the Board to identify gaps in the information infrastructure that NISO can address.

**Action # 2: Develop a Well-Synthesized Framework** – The Panel correctly points out that NISO’s approach to building its standards portfolio has been opportunistic rather than strategic. The NISO Board supports the Panel’s recommendation that a careful analysis of the current environment and future trends be undertaken which can be used to support decision-making.

**Action # 3: Address Resource and Funding Constraints and Needs** – The Board is in agreement that NISO’s financial base must be sufficient to support a robust and proactive program of standards development. The Board is alert to the fact that growth for growth’s sake may not be the best solution and are eager to seek new and creative business models. The Board is undertaking a review of NISO’s business and market opportunities as part of the strategic review now underway.

New models will also need to be considered in terms of staffing. In particular, NISO needs to find ways to acquire the time and expertise of those members of the broader community who have vision and can help direct NISO’s involvement in the information technology environment.

**Other Strategic Considerations**

**International participation** – NISO standards must accommodate global needs and perspectives. NISO will continue to be a focal point that embraces the global perspective. In addition, the viewpoint that NISO—as a standards community—can offer at the international level is unique and cannot be replaced by a government agency.

**Standards portfolio** – The Panel is correct to point out that NISO must continually re-evaluate its standards portfolio and realign the portfolio accordingly. The Board is tasking the Standards Development Committee to review the current portfolio of standards and suggest an appropriate model for re-scaling the organization’s standards responsibilities so there is organizational capacity to support new endeavors.

**Organization structure** – The panel suggested that various organizational mergers or conflations be considered within NISO’s strategic plan. The Board considered these observations, however we believe that the independent nature of the standards program must be preserved.

**Business model** – NISO has been by tradition supported by its member organizations. We believe this model can continue to support the organization and we foresee membership growth into the future. It is clear, however, that other project-oriented models can be integrated into NISO’s business model and the Board is actively reviewing these possibilities.

It is evident that the perceptible value of information standards will only grow in the years to come as ever-increasing numbers of individuals, enterprises and government agencies come to rely on rich information services. With this backdrop, it is clear that the stakes are high for all concerned in the information sector. With the strategic planning exercise well underway, the Board is confident that NISO will rise to the responsibilities and challenges ahead.

**Next Steps**

The NISO Board is continuing its work on the 2006-2011 Strategic Plan, utilizing all the inputs it has received. After reviewing and redefining NISO’s operations from top to bottom in order to address the changing landscape, the Board intends to issue the final plan in June 2005.

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**MEMBER SPOTLIGHT**

**Index Data: Born as a Standards-Based Company**

*by Cynthia Hodgson*

Index Data, founded in Copenhagen, Denmark in 1994, owes its existence to the Z39.50 standard. At the time, the international edition of Z39.50, ISO 23950, was a version behind the ANSI/NISO standard. As a result, European implementations of Z39.50 were not able to cross-search U.S. implementations, and use of the standard in Europe was growing slowly. The founders of Index Data had developed a software toolkit that allowed applications to support both versions of Z39.50 and their business took off. “We were born as a standards-based company,” asserts Sebastian Hammer, CEO of Index Data.

Since that first toolkit, Index Data has continued to develop library-related software ranging from programmer’s tools to complete turnkey applications. All of the company’s products are built around standards. “We always use an existing NISO, ISO, or World Wide Web Consortium standard-based solution, where a standard exists,” Hammer emphasizes. Although Z39.50 remains a core standard for their solutions, there are a number of other standards that play prominent roles in the company’s products. Their **Keystone Retriever** discovery service also utilizes the SOAP, SRW, and SRU search protocols, and even...
provides an augmented version of Common Command Language (ISO 8777) searching. OpenURL link generation is supported for both the original version 0.1 and the new version 1.0 (ANSI/NISO Z39.88), using the San Antonio profile for references to scholarly works. The Keystone Organizer software for content and portal management is entirely controlled by XML-structured documents and the user interface is expressed using XSLT (eXtensible Stylesheet Language Transformation). The default metadata schema is XML-encoded Dublin Core (ANSI/NISO Z39.85) and both the Open Archives Initiative’s Protocol for Metadata Harvesting (OAI-PMH), and Rich Site Summary (RSS) protocol can be utilized to harvest digital objects. All the Keystone products are 100% Unicode compliant. Several of the modular products, including the Keystone Retriever and Organizer, have been combined into the Keystone Digital Library Suite to create a turnkey federated search and Web portal system.

Index Data releases its software under an open-source license and makes it freely downloadable over the Internet from their website (www.indexdata.com). “Open source, open standards is the business strategy we have followed since the company’s inception,” Sebastian Hammer explains. “We reasoned that if good tools were available for free, then more people would implement the standards, and they might implement them better. We believe this allows solutions to be more cost-effective for both suppliers and customers.” The open source model is not well known or understood in the library applications market, but it has been successful for Index Data, and for encouraging standards compliance. The company derives their revenue from consulting on library systems applications and from providing customization, support, and training for their software products. In addition to their own fee-based support services, Index Data encourages their community of software users to freely share their knowledge, implementation experiences, and product enhancement ideas through company supported email lists and list archives.

As you would expect from a company that is a standards advocate, Index Data has been continually involved in standards development. They are a member of the Z39.50 Implementors Group (ZIG) and played a role in the ZING (Z39.50 International Next Generation) project to bring Z39.50 into the Web environment, which resulted in the SRW/SRU specifications. In NISO, Index Data is active in the Metasearch Initiative, especially in the Collection and Service Description Task Group. According to Hammer, “a critical objective is to help the user conduct a metasearch across the smallest number of resources that will answer the user’s query. This requires better mechanisms for describing and finding resources than current implementations and protocols provide.” This user-centered approach is a common theme in Index Data’s business, reflected not only in their open source software provision and dedication to standards compliance, but also in their vision: “to empower librarians to assert control over the software needed to provide high quality digital library services at a lower cost.”

The specification includes a data dictionary of all the core elements of the language. Additional data dictionaries can be defined and used within the ODRL framework. ODRL also supports the use of both digital signatures and encryption of assets for secure rights expressions. Community specific profiles are encouraged. Active profile working groups include the Geospatial Profile Working Group, the Creative Commons Profile Working Group, and the ODRL DCMI Profile Working Group. IPR Systems (Brisbane, Australia) holds the copyright to the ODRL specification but there are no license requirements; it is freely available in the spirit of open source software. The ODRL Initiative is governed by an independent International Advisory Board.

NISO NEWS AND NOTES

ODRL Receives NISO Registration

NISO’s latest approved registration is the Open Digital Rights Language (ODRL), version 1.1. ODRL is an XML language and schema for expressing rights and permission information of physical or digital content resources. It is based on a model containing three core entities: Assets, Rights, and Parties. Assets are uniquely identifiable physical or digital content. Rights include the defined permissions, constraints, requirements, and conditions for using the information asset. The Parties are designated rights holders and end users of the asset. ODRL provides the syntax for rights holders to make “offers” regarding their assets to various parties. The acceptance by a party of an offer is expressed in ODRL as an “agreement.” Agreements can also be revoked. The representation of Offers and Agreements is the core aspect of ODRL.

For more information on ODRL and a copy of the specification, visit their website: http://www.odrl.net/
OpenURL Now a National Standard

The OpenURL Framework for Context-Sensitive Services has been published as an American National Standard, ANSI/NISO Z39.88-2004. The standard, which defines an architecture for creating a context-sensitive networked service environment for digital resources, had been in trial use since June 2003.

OpenURL implementation provides a crucial service because Web links typically are not user-centric and by default take all users to the same target. The underlying concept of OpenURL is that links from a bibliographic reference should lead a user to the most “appropriate” copy of the resource. The selection of the appropriate copy is based on user and organizational preferences regarding the location of the copy, its cost, agreements with information suppliers, and similar considerations. This selection occurs without the knowledge of the user; it is made possible by the transport of metadata with the OpenURL link from the source citation to a “resolver” (the link server), which stores the preference information and the links to the appropriate material.

The OpenURL standard allows for the emergence of many different web-based service environments in which the context of the user is taken into account. Originally targeted at the electronic delivery of scholarly journal articles, the framework has been generalized so different communities can define and deploy their own context-sensitive service environments.

An online registry of all the baseline elements defined in the standard is currently being maintained by OCLC, Inc. The appointment of a formal Maintenance Agency is under review by NISO. Also included at the OpenURL Registry website are a set of implementation guidelines and the XML schemas for approved and trial use community profiles.

Download a free copy of OpenURL from:
The OpenURL Registry site: http://www.openurl.info/registry

NISO 2005 Workshops Preview

Pre-standards workshops in digital rights expression, identifiers, and digital preservation are among the NISO events beginning May 2005 and running through the Fall. Pre-standards workshops are small, invitational meetings intended to draw-out standards needs and suggested solutions from key-stakeholders and users. Upcoming pre-standards events in 2005 include:

• Pre-Standards Workshop on Digital Rights Expression, May 18-19 in Denver, CO
• A three-day event on September 19-21, in Washington DC:
  — Day one will be focused on Metasearch, including a “PlugFest,” followed by
  — A two-day workshop Open URL, Novice to Advanced
• A two day workshop on October 25-26, in Dallas (Denton), TX:
  — One day will be devoted to RFID.
  — The second day will focus on standards needs related to resource sharing.

On the drawing board are Pre-standards workshops on:
• Identifiers for Digital Resources, and
• Digital Preservation and Archiving.

Check the NISO webpage and monthly e-newsletter, Newsline, for updated information on these workshops.

At Ballot: DOI and Controlled Vocabulary Standards

Two revised NISO standards were released for ballot: Digital Object Identifier (DOI), NISO Z39.84; and Guidelines for the Construction, Format, and Management of Monolingual Controlled Vocabularies, NISO Z39.19.

The DOI standard revision, which is entirely backward-compatible with the original 2000 standard, contains a substantially re-written foreword, clarification that DOIs have no length restriction, and some technical updating regarding Unicode and case sensitivity. Supporting references and other material have also been updated.

The Controlled Vocabulary standard represents a substantial revision and expansion of the previous edition. While the previous version focused only on thesauri, the revision presents guidelines and conventions for the contents, display, construction, testing, maintenance, and management of four types of monolingual controlled vocabulary: lists, synonym rings, taxonomies, and thesauri.

Eric F. Van de Velde (California Institute of Technology) chaired the NISO Committee that developed the OpenURL standard. Serving on the committee were: Ann Apps (MIMAS-Manchester Computing University of Manchester); Oren Beit-Arie (ExLibris, Inc.); Karim Boughida (Getty Research Institute); Karen Coyle (California Digital Library); Todd Fegan (ProQuest Information and Learning); Tony Hammond (Nature Publishing); Eric Hellman (Openly Informatics, Inc.); Mike Hoover (ProQuest Information and Learning); Lou Knecht (National Library of Medicine); Larry Lannom (Corporation for National Research Initiatives); Clifford Morgan, (John Wiley & Sons Ltd.); Mark H. Needleman (SIRSI Corporation); Eamonn Neylon (Manifest Solutions); Philip Norman (OCLC, Inc.); Oliver Pesch (EBSCO Information Services); Harry Samuels (Endeavor Information Systems, Inc.); and Herbert Van de Sompel (Los Alamos National Laboratory).
Metasearch Initiative Spring 2005 Meeting Report

NISO’s Metasearch Initiative March 23-24 meeting in Raleigh-Durham, North Carolina, opened with the provocative presentation, Google Scholar: Is Metasearch Dead? by Roy Tennant (Manager of eScholarship Web & Services Design for the California Digital Library, University of California). After describing Google’s new initiative to search the Web for scholarly literature, Tennant concluded, “Unless Google Scholar becomes something very different than what it is today, it will never provide the solution libraries seek in a metasearch tool.”

The three Metasearch Initiative task groups shared updates on progress-to-date and future plans in addition to holding working sessions.

The Access Management Task Group has defined three different use cases and evaluated eleven common, or emerging, authentication and authorization methods in each of the user situations. This evaluation and ranking will be the basis for a set of best practices. The task group is also actively engaged with Shibboleth developers to investigate the use of that protocol in a metasearch environment.

The Collection and Service Description Task Group, having previously settled on Dublin Core and ZeeRex as the basis for collection and service description, respectively, is now close to recommending the metadata requirements. The task group reminded the committee that disclosure and discovery of collections is an essential part of making the wider NISO-MI effort a success. Recognized as currently out-of-scope (but important to the overall success of metasearch) are the maintenance and exchange of collection and service descriptions, and the need for globally unique collection identifiers (a need not unique to metasearch).

The Search and Retrieval Task Group is concentrating its efforts on determining a lower barrier of entry into the metasearch market that both embraces standards and also creates a realistic opportunity for content providers to adhere to standards. The group identified SRW/SRU as the basis for the forthcoming NISO-MI XML Gateway profile. This approach will allow a search to be submitted as a URL via HTTP and the response returned in XML format. A subset of OpenURL 1.0 has been proposed for baseline citation data minimal data sets for records coming back from targets. All three task groups are planning to have publishable content—including, where appropriate, draft standards for trial use—by June 2005.

An interoperability Plug-Fest event will be held in September 2005 to demonstrate the applicability of the new standards and recommendations, and to introduce and promote the new best practices and standards to content providers.

Revision of Bib Ref Standard Approved

A 2005 revision of Z39.29, Bibliographic References, was approved by NISO; final ANSI approval is anticipated by the time of this publication. This standard provides rules, guidelines, and examples for the creation of bibliographic references for a broad range of source materials—print and non-print, published and unpublished—for inclusion in such applications as bibliographies, end-of-work references, footnotes, and abstracting and indexing sources in any medium. The revision addresses citations of electronic resources in a variety of formats, an area that has grown enormously since the standard’s original issuance in 1977.

The creation of bibliographic references as specified in the standard follows four principles:

- References are constructed from bibliographic elements and their sub-elements for logical presentation;
- References are based on a common set of elements arranged in a specified order;
- References reflect the appropriate bibliographic levels required for unique identification of cited material; and
- References are based on recommended sources of data.

Bibliographic references are built from elements, such as author, title, place of publication, publisher, date, etc., and their sub-elements, where appropriate. The elements in a reference may vary, depending on the use being made of the work and on the availability of bibliographic data on the original work. The standard specifies which elements are required and which are optional, and lays out the sequence in which bibliographic elements are to be listed in a reference. It also defines three bibliographic levels—analytic, monographic, and collective—to enable specificity in citing references that are part of another work.

M.E. Brennan (Lucent Technologies) chaired the committee that developed the revision to Z39.29. Serving on the committee were: Margaret Morrison (Hendrix College), Ellis Mount (Mount Data Services), Karen Patrias (National Library of Medicine), and Victor Rosenberg (School of Information, University of Michigan).

Follow the MI group’s work at: http://www.lib.ncsu.edu/niso-mi

Slides from Tennant’s presentation are available from: http://escholarship.cdlib.org/tennant/presentations/2005niso/

Download Z39.29 from: http://www.niso.org/standards/quick_list.html
Serial Release Notification Format Drafted

The NISO-EDItEUR Joint Working Party on the Exchange of Serial Subscription Information has issued a draft Serial Release Notification (SRN) transaction format. The purpose of the SRN message is to enable a publisher or intermediary to announce the release of a serial issue or contribution unambiguously and as concisely as possible. Recipients of SRN messages can use this standard message in a variety of ways that add efficiency and value to their services. For example:

- An integrated library system can use an SRN message to update a serial “expected date” automatically in its serials control module. With a real expected date, the number of premature claims for items assumed to be late should go down.
- Abstracting and indexing services can prepare themselves for incoming issues in a more efficient way and improve workflow.
- The SRN will enable periodical aggregators and vendors to anticipate a receipt date for a serial and plan their workload accordingly.
- SRN messages can be used to update (or maintain) library holdings in a serials union catalog.
- SRN messages can be used to update an OpenURL link resolver with the most recent information about what a library has received.

Issued simultaneously with the transaction format, are sample SRN release records illustrating various examples of enumeration and chronology. These sample SRN release records illustrate how the MARC Serials data has been bridged and translated to ONIX format for inclusion in the SRN message.

Following the end of the comment period on April 30, the transaction format will be updated with any necessary changes and pilots will be conducted through the summer of 2005.

Innodata Isogen and Paratext Join NISO

NISO welcomes new members: Innodata Isogen and Paratext.

Innodata Isogen, headquartered in New York City, optimizes content supply chains—helping companies improve how they create, manage, and distribute information. Their portfolio of services ranges from consulting, strategic planning, and training to full outsourced provision of services anywhere in the content management chain including editorial, digitization, data conversion, XML coding, and metadata creation. Their customer base includes commercial publishers, blue-chip enterprises, federal and state agencies, and major archives, libraries, and museums. Carolyn Muzyka is Innodata Isogen’s voting representative to NISO.

Paratext is an independent publishing company headquartered in Sterling, Virginia. Their bibliographic and full text databases for the academic, public, and special libraries community include Reference Universe, 19th Century Masterfile, Book News Online, and Schwann Online. Robert Asleson is Paratext’s primary NISO representative; Eric Calaluca is the alternate.

NISO STANDARDS IN PRACTICE

Dublin Core Initiative Going Strong After Ten Years

March 2005 marked the tenth anniversary of the Dublin Core, a standard that began its development at a workshop that took place in Dublin, Ohio, in March 1995. That workshop was followed by a workshop series, a full conference series, the formation of the Dublin Core Metadata Initiative (DCMI) organization, and the issuance of both an American National Standard (ANSI/NISO Z39.85) and an international standard (ISO 15836) called the Dublin Core Metadata Element Set.

March also marked the release of the The Dublin Core Metadata Initiative (DCMI) Abstract Model. The specification provides a reference model against which particular DC encoding guidelines can be compared. It is primarily meant for software developers, people creating new syntax encoding guidelines, and people developing metadata application profiles for Dublin Core metadata. Appendices discuss the relationship between the DCMI abstract model and the Resource Description Framework (RDF), the Guidelines for implementing Dublin Core in XML, and the expression of Dublin Core in HTML/XHTML meta and link elements.

A joint Working Group has been formed with the Open Digital Rights Initiative to develop a profile of ODRL/DCMI metadata usage. The profile will show how to make combined use of the rights-related DCMI metadata terms and the ODRL rights expression language. This will enable richer rights management information to be captured along with DC descriptive metadata and support wider interoperability with digital rights and open content licensing systems.
DCMI has also released two documents for public comment:

*Guidelines for Encoding Bibliographic Citation Information in Dublin Core Metadata* provides guidelines for capturing bibliographic citation information within a Dublin Core description. It focuses on bibliographic citations for journal articles, but it also considers other genres.

*Element Refinement in Dublin Core Metadata* explains the consequences of stating that one property “refines” a second property. The purpose is to clarify that in some cases it may be appropriate and useful to make such an assertion and in other cases such an assertion may result in contradictions.

### New NCIP Application Profiles Available

The NISO Circulation Interchange Profile (NCIP) Maintenance Agency has released two draft application profiles to support the NCIP standard (ANSI/NISO Z39.83-2002). Both of the new profiles are for verifying the identity of a patron.

The NCIP Basic Patron Authentication Profile defines the use of NCIP by a group of libraries to determine whether the credentials of a user can be authenticated and details the specific use of NCIP messages for retrieving information about Agencies and about Patrons. An example use of the profile would be for authenticating a patron’s privilege to access a licensed database.

The NCIP Application Profiles are available from:

http://www.cde.state.co.us/ncip/application_profiles_approved.htm

The NCIP Patron Authentication Profile provides a variation on the basic profile, utilizing a different NCIP service to verify the patron. In addition to the licensed database access example, this profile could also be used to authenticate a patron’s eligibility for ILL services or reciprocal library borrowing.

### Google Scholar to Make Use of DOI and OpenURL

Google Scholar is a newly announced service of Google to search and retrieve scholarly literature across the Web. Two technologies based on NISO standards—Digital Object Identifiers (DOI) and OpenURL—have been incorporated into the company’s beta test of this service. Libraries that make their resources available via OpenURL link resolvers can include a link for their patrons to these resources as a part of the Google Scholar search. Campus users at participating schools will see additional links in Google Scholar search results which lead to the library’s link resolvers servers which, in turn, direct them to the full-text of the article. Users will still require authentication by the library’s system as a valid user of the resource before they can access the full-text.

Google has also been exploring with the DOI agency CrossRef the utilization of Digital Object Identifiers to link Google Scholar search results directly to the publishers’ digital copy of the referenced content. Forty-three publishers are participating in CrossRef Search, a pilot for cross-publisher, full text search of published, scholarly literature, utilizing Google’s search engine and a CrossRef gateway of DOI links. CrossRef and Google are exploring additional services and methods for optimizing Google’s use of the DOI.

### NARA Issues Guidelines on Managing Web Records

The U.S. National Archives and Records Administration (NARA) has issued guidelines on *Managing Web Records* to aid federal agencies in managing records that are included in websites and to mitigate the risks faced by using the Web to carry out agency business. Although intended for the federal government, the guidelines provide much useful advice for any organization with internal or external websites that contain information which could potentially be classified as a record.

The guidelines are comprised of four sections:

- General Background, Responsibilities, and Requirements outlines the various ways in which agencies use websites, the roles played by different agency staffs in web operations, and the basic statutory requirements that govern websites.

Managing Web Records, aimed particularly at webmasters and IT staff, outlines the steps an agency must take to ensure trustworthy web records.

Scheduling Web Records provides guidance in developing disposition schedules for web records. It addresses such matters as the types of records that should be covered in web schedules, how these schedules might be structured, and the factors an agency should consider in determining how long records should be retained.

Appendices contain a glossary of relevant definitions, a list of websites with related applicable resources, and sample Web records retention schedules.

View the guidelines at:

http://www.archives.gov/records_management/policy_and_guidance/managing_web_records_index.html
RLG Provides EAD Report Card Program

RLG has released the EAD Report Card, an automated program for checking the quality of Encoded Archival Description encoding. Designed to supplement RLG’s Best Practice Guidelines for Encoded Archival Description, the Web tool allows uploading of any finding aid encoded as an XML DTD using version 2002 of the EAD. The program will flag any discrepancies found in the file and link the user to the relevant section of the encoding guidelines for further information.

The Encoded Archival Description is a standard for encoding archival finding aids using eXtensible Markup Language (XML). The standard is maintained in the Network Development and MARC Standards Office of the Library of Congress in partnership with the Society of American Archivists.

ARMA Publishes Standard on Retention Management

ARMA International has published Retention Management for Records and Information (ANSI/ARMA 8-2005), a standard to provide guidance for establishing and operating a retention and disposition program. The standard covers general principles for authority and responsibility, identifying and classifying records for retention purposes, and for determining retention periods for all records on all media and in all formats.

Implementation of the recommended retention and disposition program will help ensure compliance with operational, legal/regulatory, fiscal, and archival requirements by defining periods of time for which records are to be maintained, appropriate methods for disposition of records, and measures to be taken when disposition must be temporarily suspended.

ANSI/ARMA 8-2005 is available for purchase from the ARMA bookstore and distributors of ANSI standards.

AIIM Announces ECM Web Services Standards Activity

AIIM, the enterprise content management standards developer, has announced a new activity to develop a service oriented architecture framework for Interoperable Enterprise Content Management (iECM). The project intends to address, through the development of standards, the growing need for a common integration layer between different enterprise content management related systems and multiple business applications.

The concept includes a suite of Web services standards that provides a common set of interfaces by which ECM solutions and enterprise applications can interoperate and manage content and content rich processes within a secure environment. This standards development effort is intended to provide end-user organizations, vendors, and integrators with guidance around how to architect their content-centric applications and business processes. It is also expected to provide vendors with direction on how to evolve their technologies to deliver the interoperable services required in meeting their customers’ requirements.

To participate, contact Betsy Fanning, Director, AIIM Standards Program at bfanning@aiim.org.

INTERNATIONAL UPDATE

Multiple Levels Issue Resolved for ISSN Revision

The ISO Working Group revising the International Standard Serial Number (ISSN) standard (ISO 3297) reached consensus on the basic content of the new standard at its February 3-4 meeting in Amsterdam. In a significant step, the group resolved the puzzle of achieving identification at multiple levels of granularity via the ISSN, one of the most-used, unique resource identifiers. Major decisions included:

The scope will be defined broadly and flexibly to enable ISSN to attain optimum coverage in the information environment. The stated scope of the standard will be continuing resources – all serials and ongoing integrating resources.

Title-level identification will be achieved with a new mechanism called the “t-issn,” an additional element that will enable the co-location of the various medium versions of a given title while retaining their separate ISSN. The first ISSN assigned will also be designated the t-issn, regardless of whether the serial is published in one or multiple media. The t-issn will be considered a different namespace from the ISSN and will be tagged as such in, for example, MARC records and in XML. Use of the MARC 21 024 field is being proposed, with the expectation of requesting a specific indicator value for the t-issn. Serial records would thus carry both 022 (ISSN) and 024 (t-issn) fields. A project has been proposed whereby the ISSN International Centre would automatically assign t-issn retrospectively to all records in the ISSN register by using the lowest ISSN where more than one ISSN exists for various medium editions.
The broad coverage and flexibility that will be described in the new standard’s scope statement will allow the current use of ISSN in EAN bar codes to continue for product-level identification, thereby resolving previous concerns about granularity. A minimum set of metadata will be defined to facilitate broader ISSN coverage and more publisher cooperation in the assignment process.

The first meeting of the new ISSN users group was held on April 27 at the ISSN International Centre in Paris. Invitations to join the users’ group were sent to all members of the ISO working group who do not work in libraries and to all professional organizations representing ISSN users outside of the library world.

A new subscription service is under development at the ISSN International Centre that would “push” data to such subscribers as link resolution knowledge bases, PAMS (Publications Access Management Companies), subscription agencies, and libraries to allow these ISSN users to automate the population of their databases with ISSN information. Also under consideration is a link resolution and lookup service.

The ISSN working group’s plan is to finalize a Committee Draft version of the standard for ballot in June 2005. A working draft is available for review on the committee’s website.

ISO TC46 Standards Released for Ballot

ISO’s Information and documentation Technical Committee 46 (the international equivalent to NISO) released the following standards for ballot.


International Library Statistics (ISO/CD 2789) addresses developments in electronic library services. This draft of the fourth edition resolves some problems in the practical application of the third edition and addresses developments in electronic library services. The ballot closes on April 30, 2005.

Codes for the representation of names of countries and their subdivisions – Part 1: Country codes (ISO/DIS 3166-1) – When approved, this standard will become the sixth edition, superseding the 1997 version. It comprises a consolidation of all changes to the country codes lists as agreed to by the ISO 3166 Maintenance Agency as published in the newsletter up to V-10. The previous Committee Draft ballot was approved and the standard has been advanced to the Draft International Standard (DIS) stage. The ballot has an extended review time, closing on August 24, 2005.

Codes for the representation of names of countries and their subdivisions – Part 2: Country subdivision codes (ISO/CD 3166-2) – When approved, this standard will become the sixth edition, superseding the 1998 version. It comprises a consolidation of all changes to the country subdivision code lists as agreed to by the ISO 3166 Maintenance Agency and published in their newsletters up to issue I-6. The ballot closes on May 13, 2005.

International Standard Text Code (ISTC) ISO/DIS 21047 – The ISTC standard defines a unique, international identifier of individual textual works. It provides a way for textual works to be uniquely distinguished from one another within computer applications and for the purposes of administering rights to such works. The ballot closes on May 30, 2005.

Statistics on the production and distribution of books, newspapers, periodicals and electronic publications (ISO/CD 9709) – The goal of this standard is to define publishing statistics that when used create directly comparable data from different countries. This draft second edition addresses changes in electronic publishing with greater emphasis on statistics related to electronic publications. The ballot closes on June 1, 2005.

New Work Item Proposal for MarcXchange – This new standard proposal, submitted by Danish Standards, provides a tool for interchange of MARC records in XML as a support to interchange of MARC records in ISO 2709, Format for Information Exchange. A draft standard accompanies the proposal. The ballot to approve further work on this standard closes June 15, 2005.

As a benefit of membership, NISO voting members are able to review and comment on all ISO TC46 standards as they evolve through the standards pipeline. NISO compiles the U.S. vote and comments, which are submitted via ANSI to ISO.

See What’s in ISO’s Future!

**PRISM Specification Made Available in Modules**

PRISM (Publishing Requirements for Industry Standard Metadata) has issued a modularized version of the PRISM 1.2 Specification, separating the PRISM Specification into separate modules that can be maintained and extended individually. PRISM defines a set of XML metadata vocabularies that help to automate the repetitive tasks performed by systems that access, manage, track and re-purpose content.

The modularization is a first step in responding to a call from publishers to expand the PRISM umbrella by defining more metadata vocabularies. Developing these additional metadata vocabularies would require several working groups that could advance PRISM in a coordinated manner. According to Dianne Kennedy, IDEAlliance Vice President of Publishing Technologies, “Over the past year, the PRISM standard has gained traction as companies have begun to use it in actual production environments. We have taken this opportunity to modularize the PRISM Specification so that it can more easily serve as the basis for extending IDEAlliance publishing content metadata standardization efforts on several fronts.”

The initial release of the modularized PRISM Documentation Package consists of seven PRISM Documents, which in total are the equivalent of the single PRISM 1.2 Specification that was approved in December 2004. The combined PRISM Specification will no longer be maintained; all revisions will be made to the individual modules, with each being versioned separately.

New in this modularized version of the PRISM Specification is formal documentation of the new PAggregator Message (PAM) Namespace and a PAM Controlled Vocabulary. Two related specifications, developed by Nature Publishing Group, have been posted in the “Contributed Resources” area of the PRISM website: an RSS 1.0 module and an RDF schema for PRISM 1.2.

PRISM is an IDEAlliance (International Digital Enterprise Alliance) Working Group. The member companies are involved in content—creation, categorization, management, aggregation, and distribution—both commercially and within Intranet and Extranet frameworks.

The PRISM specification is available from:
http://www.prismstandard.org/

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**WWW Specification Addresses Character Coding on the Web**

The World Wide Web Consortium released Character Model for the World Wide Web 1.0: Fundamentals as a W3C Recommendation. The document allows Web applications to transmit and process the characters of the world’s languages in a well-defined and well-understood way, furthering the W3C goal of universal access.

Building on the Universal Character Set defined by Unicode and ISO/IEC 10646, it gives authors of specifications, software developers, and content developers a common reference for text manipulation in Web applications. Topics addressed include use of the terms “character”, “encoding”, and “string”; a reference processing mode; and choice and identification of character encodings, character escaping, and string indexing.

Access the Character Model spec at: http://www.w3.org/TR/charmod/

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**Semantic Web Update**

The WorldWideWeb Consortium’s Semantic Web activity continues its efforts for Web data interconnection with new releases of RDF use cases, a survey of RFD/Topic Maps interoperability, and an update on the SPARQL RDF query language.

The RDF Data Access Working Group has released an updated Working Draft of RDF Data Access Use Cases and Requirements. The draft suggests how an RDF query language and data access protocol could be used in the construction of novel, useful Semantic Web applications in areas like Web publishing, personal information management, transportation, and tourism.


The RDF Data Access Working Group has released the third Working Draft of the Protocol And RDF Query Language (SPARQL), which offers a way to write and to consume search results across a wide range of information such as personal data, social networks, and metadata about digital artifacts like music and images. Applications using this common protocol can access and combine information from disparate sources across the Web.

Visit the Semantic Web website for more information:
http://www.w3.org/2001/sw/
New ISO Standards of Interest

Recently issued ISO standards of interest to ISQ readers include:

ISO/IEC 11179-6:2005, Information technology — Metadata registries (MDR) — Part 6: Registration — Specifies the procedure by which Administered Items (defined in Part 3: Registry metamodel and basic attributes) can be registered and assigned an internationally unique identifier. The standard was developed by ISO/IEC JTC 1/SC 32 and approved on January 20, 2005.


ISO/IEC 15444-12:2005, Information technology — JPEG 2000 image coding system — Part 12: ISO base media file format — Specifies the structure and uses of the ISO base media file format designed to contain timedit media information for a presentation in a flexible, extensible format that facilitates interchange, management, editing and presentation of the media. The technically identical text is published as ISO/IEC 14496-12:2005 for MPEG-4 files. The standard was developed by ISO/IEC JTC 1/SC 29 and approved on April 6, 2005.

Standards Q&A: Journal Titles

In this new column, we will answer your questions on standards. The identity of the questioner is kept anonymous. NISO staff consults with the NISO members and an extensive network of experts to bring together a variety of perspectives. You are invited to send your questions to nisohq@niso.org; please put “Standards Q&A” in the subject line.

Q

A journal editor at a scientific and technical publisher is working with a client (which we will call ABC) to develop a new journal. The client is anxious to title the new publication “Journal @ ABC”. The editor wanted to know if they will encounter any standards-related problems, especially with respect to indexing and retrieval.

A

The reviewers NISO consulted were unanimous in congratulating the editor for thinking this through in advance of selecting a title. They were also unanimous in recommending that the “@” symbol not be used. They pointed out that rather than making the new journal stand out and sound high tech, using @ would obscure the title and make it harder to find. A number of potential problems were cited:

• Although AACR2 has little guidance to offer with regard to special characters, examples of journal titles with special punctuation often require special additional cataloging for the title. For example, an existing journal called C+ was cataloged with a main title of “Creativity plus” and parallel titles of “C+” and “C plus”.

• Information systems are notoriously “non-standard” in their handling of punctuation, both in storage of the information and in retrieval. Some systems even strip out special punctuation when text is indexed or when processing user search queries. The @ symbol may not appear in displays of the title or could be replaced with a different character or a space. This non-standard handling could be especially problematic when two systems are interchanging information related to the title, e.g. a subscription agency’s system and a library’s serials check-in, or a library acquisition system and a book seller’s ordering system.

• The rules also vary for handling punctuation when sorting: would the “@” symbol come before or after a letter, number or space, or would it be ignored altogether? The journal could appear inconsistently in alphabetical journal title lists, making it difficult for users to find it.

• Software that supports HTML (most email clients, many word processors, web browsers and development tools) will expect something in that format to be a domain address and may auto-format the text. One word processor, for example, turned the phrase into a “mail to” hypertext link.

Standards MetaLibrary Launched

Andy Updegrove, publisher of the monthly Consortium Standards Bulletin, has launched the Standards MetaLibrary, an online research resource focusing on standards and standard setting.

The Standards MetaLibrary is concerned with standards but not from a technical viewpoint. Instead, it focuses on the importance of standards to the modern world and their impact on society, and how they are created, and by whom. According to Updegrove, “Just about everything we own or use, from cell phones to light bulbs, is affordable and usable rather than expensive and useless
This is a capsule report on each active NISO standard in development. The list does not include current, approved standards that are not in revision. To learn more about each activity, go to http://www.niso.org/standard.html

Note: DSFTU stands for Draft Standard for Trial Use.

STANDARDS STATUS: APRIL 1, 2005

This is a capsule report on each active NISO standard in development. The list does not include current, approved standards that are not in revision. To learn more about each activity, go to http://www.niso.org/standard.html

Note: DSFTU stands for Draft Standard for Trial Use.

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<th>COMMITTEE</th>
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<th>STATUS</th>
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<tr>
<td>AU</td>
<td>Z39.87-200X (AIIM 20-200X), Data Dictionary — Technical Metadata for Digital Still Images</td>
<td>To be balloted in 2005</td>
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<td>Z39.88-200X, OpenURL: A Transport Mechanism for ContextObjects</td>
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<td>Approved by NISO; ANSI approval pending</td>
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<td>Metasearch Initiative - Task Group 2 - Collection Description</td>
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<tr>
<td>BC</td>
<td>Metasearch Initiative - Task Group 3 - Search/Retrieve</td>
<td>In development</td>
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NEW NISO REGISTRATIONS

For more information on these standards and the NISO registration process, visit: http://www.niso.org/registration/registration.html

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<th>STANDARD</th>
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<tr>
<td>Open Digital Rights Language (ODRL) version 1.1 [approved 03/25/2005]</td>
<td>ODRL International Advisory Board</td>
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Correction: Due to a database error, the following NISO members were left out of the member listing in the January issue of ISQ:

Checkpoint Systems, Inc.
Representative: Douglas Karp; Frank Palazzo (Alternate)

Motion Picture Association of America (MPAA)
Representative: Michael Owens

because of standards. There are over a million supported standards today, created by many hundreds of non-profit standards development organizations. The materials that we index in our MetaLibrary are concerned with how standards are set, how governments support them, the economic benefits of standards, legal aspects of their use (and abuse), and many other topics that can help us study the role of standards in the world today.

The Standards MetaLibrary is the latest module of the ConsortiumInfo.org website. Their hope is that the Standards MetaLibrary will not only facilitate, but also encourage outcomes such as: the serious study of the importance of standards, the creation and promotion of “best practices” in standards creation, the proliferation of course offerings in academia on standards and their creation, and greater understanding of standards and standard setting in government, resulting in more coherent and coordinated support of standards.

The MetaLibrary currently has 18 major categories and 85 subcategories with abstracts and links to the full article text. A number of articles by and about NISO are included in the Library.
**LEARNING LINKS**

**Descriptive Metadata Guidelines for RLG Cultural Materials**  
RLG, January 2005.  
Provides guidelines for contributors to the RLG Cultural Materials database that are also applicable for describing collections of unique cultural objects—regardless of the specific metadata standards in use. Contains example EAD and MODS schemas.  

**The Feel Good Standard**  
Discusses the benefits of the NISO Circulation Interchange Protocol (NCIP) and describes its use in circulation, interlibrary loan, self-service applications, and direct consortial borrowing.  
http://www.libraryjournal.com/article/CA490061

**First, Do No Harm: A Register of Standards, Codes of Practice, Guidelines and Similar Works relating to Preservation and Conservation in Libraries and Archives**  
compiled by John McIlwaine for IFLA, March 2005.  
A register of standards and other works that provide specific guidance and structured advice for libraries and archives in the practice of preservation management and conservation.  

**Managing Digital Assets: A Primer for Library and Information Technology Administrators**  
Presentations from CLIR meeting, February 4–6, 2005, Charleston, South Carolina  
Speakers’ notes and PowerPoint presentations from the meeting including talks on metadata, scholarly communications, strategic issues in managing digital assets, curation, and the DSpace and Shibboleth projects.  
http://www.clir.org/activities/registration/feb05_managing.html

**Net Generation Students and Libraries**  
Explores how libraries might better adapt to the needs of Net Gen students in the areas of access to and use of information resources, provision of library services including virtual reference, and the integration of physical and virtual environments.  
http://www.educause.edu/books/educatingthenetgen/5989

**OpenURL: What All Library Staff Should Know**  
Provides an introduction to how OpenURL works including a parsing of the base OpenURL syntax. Includes copies of presentation slides and detailed speaker notes.  

**Shibboleth: A New Approach to Web Based Access Control**  
presented by Steven Carmody (presentation copyrighted by Nate Klingenstein), CNI Spring 2005 Task Force Meeting, April 4-5, 2005.  
Discusses the Shibboleth architecture; its benefits to campuses, services, and vendors; the current status of the specification; and next steps in the project. Includes examples of five university implementations.  

**SRW/U with OAI: Expected and Unexpected Synergies**  
Contrasts the approaches of SRW/U and OAI for retrieval and looks at some novel ways in which they have been or may be usefully co-implemented.  
http://www.dlib.org/dlib/february05/sanderson/02sanderson.html

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**CALENDAR**

**May 2005**

May 11-12  
NISO Board of Directors Meeting  
Oakland, California

May 18-19  
Digital Rights Expression Pre-standards Workshop  
Denver, Colorado

**June 2005**

June 22-23  
ZING (Z39.50 International: Next Generation) Information Forum  
University of Illinois at Chicago, Illinois

June 24  
NISO/AVIAC meeting (4:30-5:30pm)

June 27  
NISO/EDItEUR JWP Committee Meeting (11:30am-12:30pm)  
members only