

2021 Membership Meeting NISO Annual Report of 2020 Activities

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Executive Director, NISO
NISO Annual Meeting Webinar
June 25, 2021



2021 Membership Meeting Overview

- Reflecting on who we are and why we do this
- 2020 A year ...
- NISO Plus 2021
 - NISO Plus 2020 2021 Goals and Outputs
 - Plans for NISO Plus 2022
- NISO 2020 Membership
- NISO 2020 Finances
- DEI Initiative
- NISO Standards Program
- Looking to the future
- Open discussion of NISO activities



Our Vision

Our Vision

NISO's vision is a world
where all benefit from the
unfettered exchange of
information

Our Mission

Our Mission

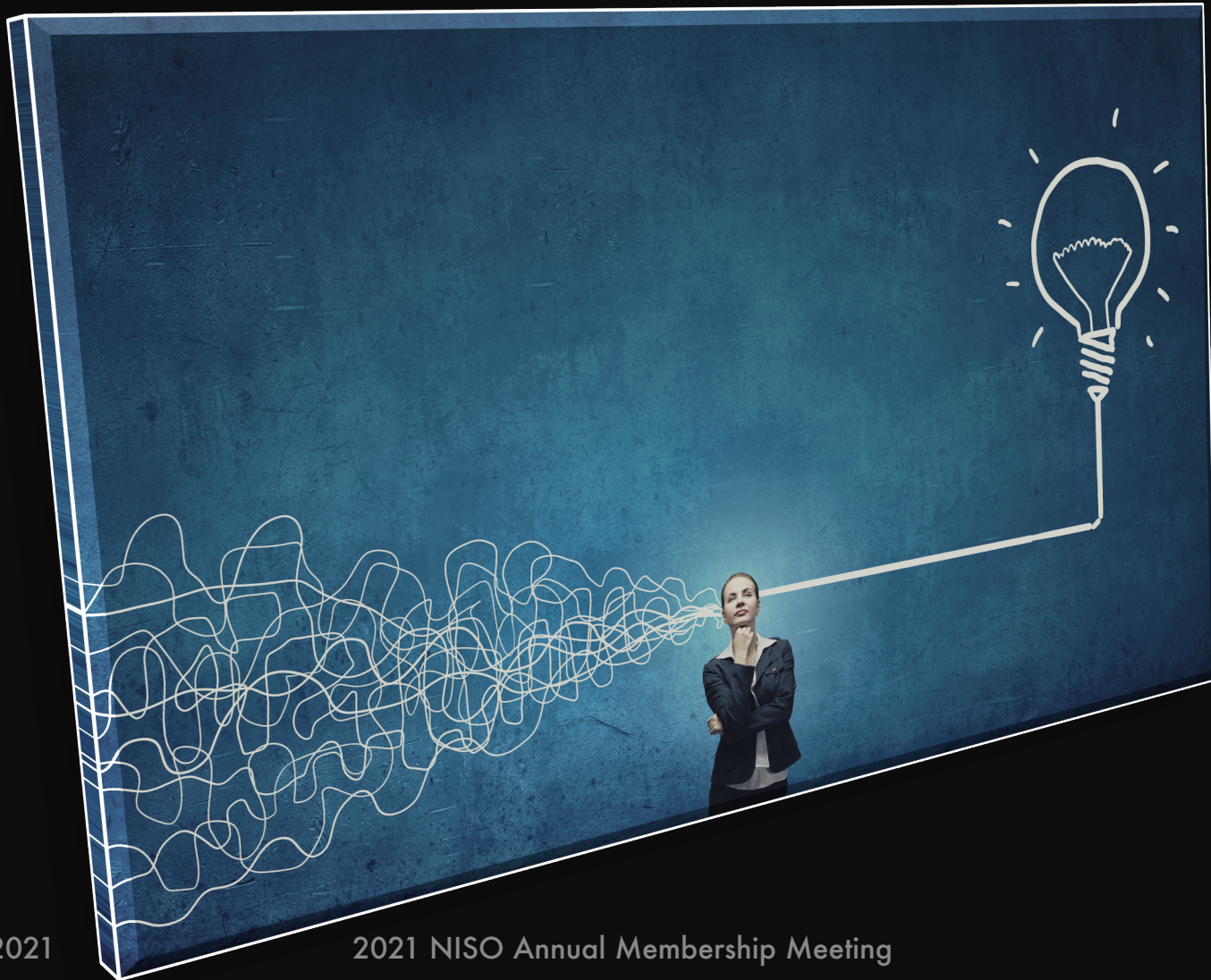
The mission of NISO is to build knowledge, foster discussion, and advance authoritative standards development through collaboration among the cultural, scholarly, scientific, and professional communities.

NISO's Strategic Goals

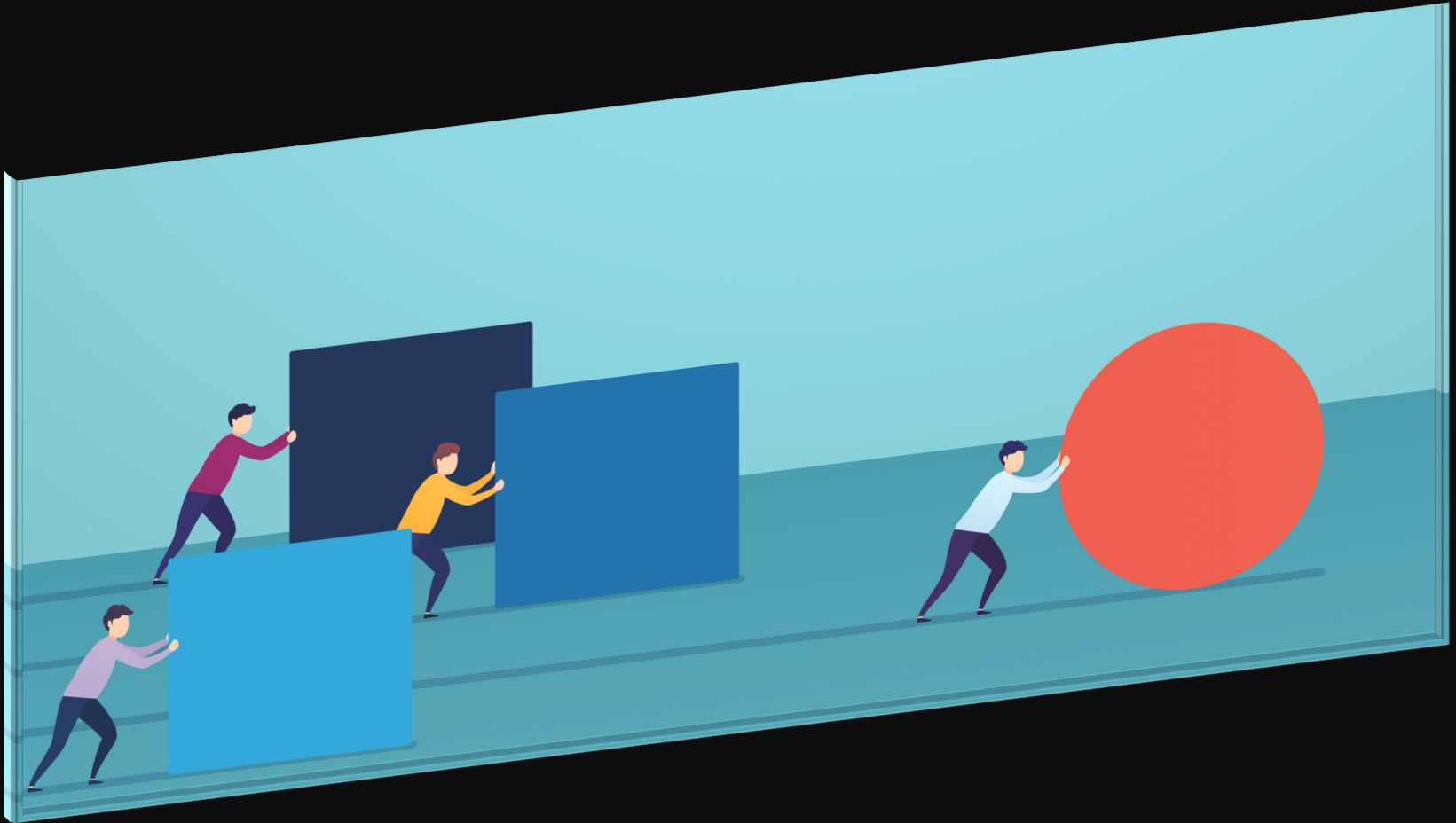
Diversity Equity & Inclusion



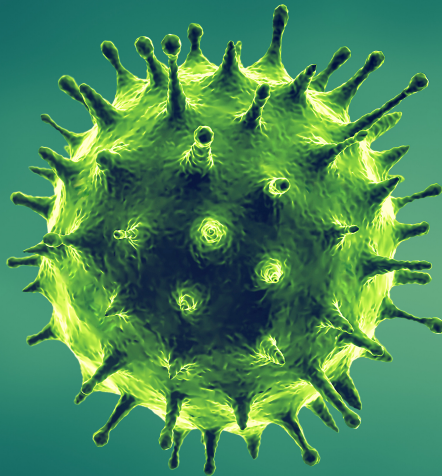
Effective Thought Leadership



More Efficient With Standards



2020 Was... Strange...



How I felt in the spring of 2020



NISO PLUS 2021

Global Conversations  Global Connections



What were we trying to do?

Generate Ideas





What were we trying to do?

Generate Ideas

Practical Solutions





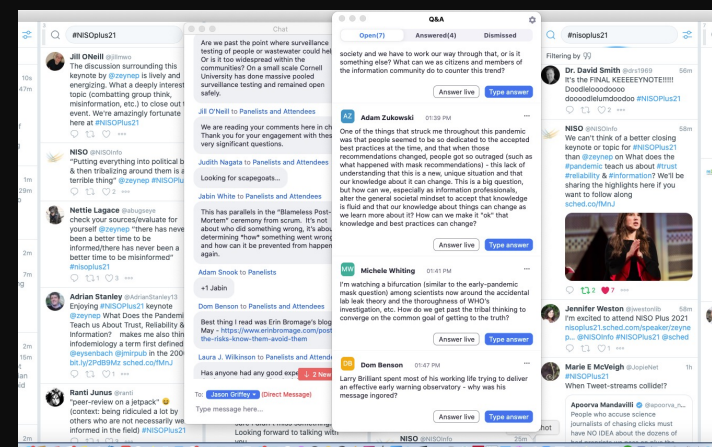
What were we trying to do?

Generate Ideas

Practical Solutions

Focus on Value





all categories

Categories

Latest

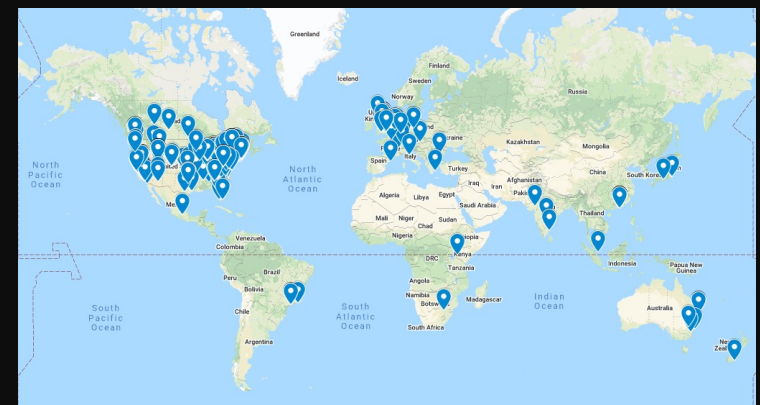
New (1)

Unread (2)

Top

+ New Topic

Category	Topics	Latest
NISO Plus 2021 <p>Here you will find threads for each of the Sessions from NISO Plus 2021, as well as other discussions that attendees find valuable.</p>	48 2 unread 1 new	Welcome to Discourse <div>Aug '20</div>
NISO Plus 2021 Planning Watercooler Pet photos, last book you read, favorite movie of the year, or just the weather...if you want to start a conversation about stuff, here's where you can start. Non-NISO side chatter goes here!	16 1	The future of intellectual property: AI and machine learning <div>■ NISO Plus 2021</div> <div>8 35m</div>
Uncategorized Topics that don't need a category, or don't fit into any other existing category.	1	Identifiers, metadata, and connections <div>■ NISO Plus 2021</div> <div>1 1h</div>
Site Feedback Discussion about this site, its organization, how it works, and how we can improve it.	0	Access, authentication, and authorization <div>■ NISO Plus 2021</div> <div>11 2h</div>
		Seamless Access and Federated Authentication: next steps <div>■ NISO Plus 2021</div> <div>4 2h</div>
		Controlled digital lending and new models of sharing <div>■ NISO Plus 2021</div> <div>4 14h</div>
		Open versus proprietary in software and systems <div>■ NISO Plus 2021</div> <div>1 15h</div>



850 Participants

26 Countries **536 People @ Social Events**

167 Speakers & Moderators **778 GB of Video**

61 Hours of Content **28 Sponsors**

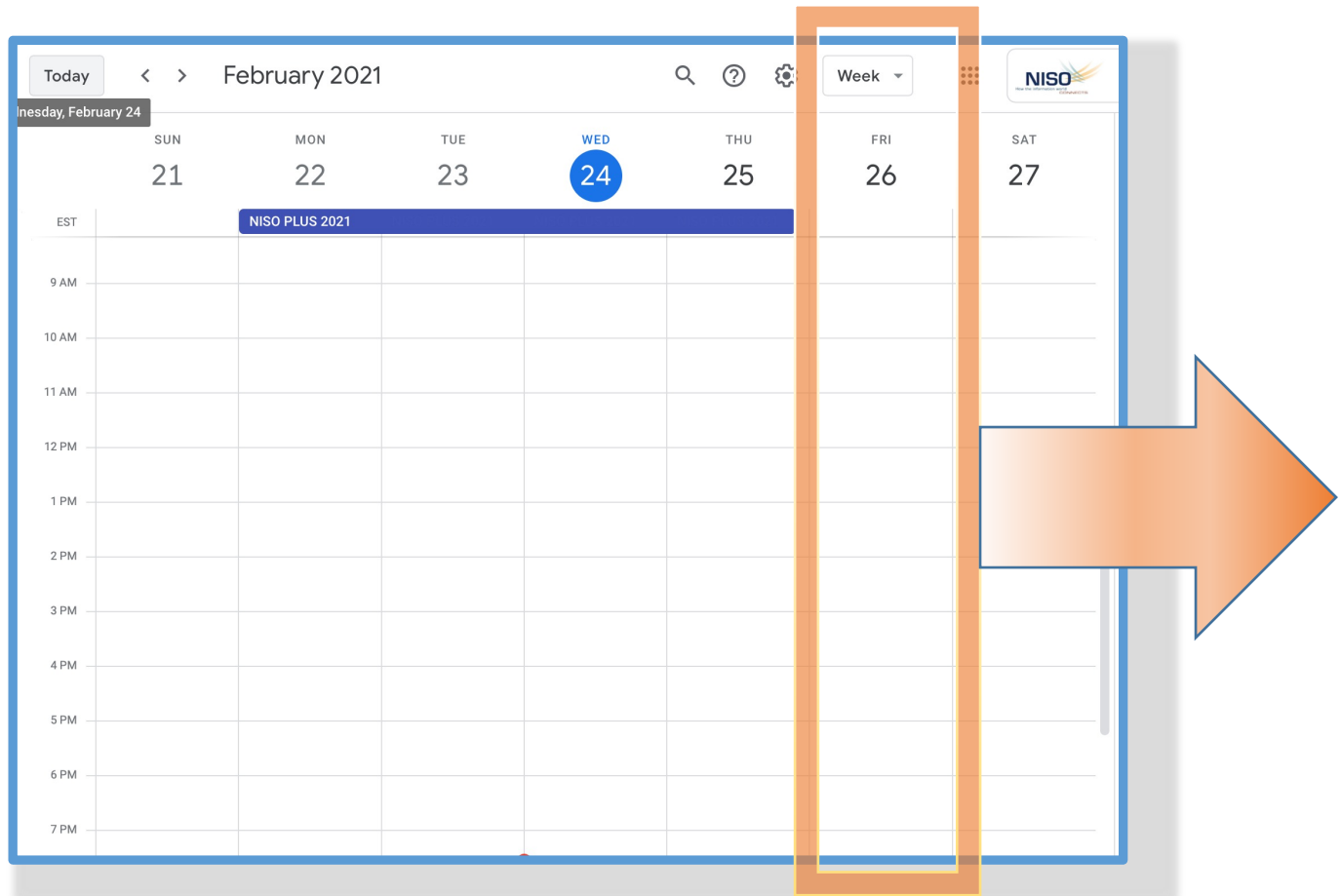
5 Keynotes **52 Sessions**

Plus 21 Positive Feedback

- *98% of respondents rated the overall quality of both the speakers and content as either valuable or extremely valuable*
- *91% of respondents found the viewings of recorded presentations followed by live discussions on zoom valuable or extremely valuable*
- *97% of speakers were satisfied or extremely satisfied*



**NISO Plus isn't about
what happens between the
opening and closing...**



It's About The Results

N+ 2021 Ideas & Outputs

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Controlled Digital Lending & New Models of Sharing

	B	C	D	E	F	G	H	I	J	K
1	Staff	Session Title (link leads to Sched page with slides, recordings, and discussion in Discourse)	Idea	Is this a specific project idea?	Volunteers	Staff/Topic Ctee Top Pick	Number of Chat names	Number of Discourse people/threads	NOTES	Count of Staff Top Picks
2	AM	The essential nature of digital preservation	we need a shared standard but extensible metrics for success in digital preservation.	Yes	Volunteers listed in Chat: Erik Swenson, Bohyun Kim, Leslie Johnston, Joseph Koivistoo, Paul Stokes, & CET (?)	Alice, Moon, Stephen F, AN, TB	6	0		5
3	TAC	Research data: describing, sharing, protecting, saving	Integrating Publisher and Repository interfaces. Getting publisher-related functionality integrated into repositories to facilitate integration of repositories into traditional publication process	Yes	Lwynholds, amanda casari, Paul Stokes, Vincent Lizzi, Eric Swenson, Ian Bruno, Sarah Harvey, Megan Force, (Rachel Donahue: "I might be interested! But Natasha's right about needing more time to ponder")	AH, Stephen F, CH, ChristineS, TB, Bob S, AK	8	0	SWORD protocol exists (Simple Web-service Offering Repository Deposit). This seems like less of a work item than an effort to get publishers to participate.	7
4	TAC	FAIR Data Principles and Why they Matter	Improving FAIR metadata and DATA. Looking at costs and value of data sharing	-ISH	Davin Baragiotta, Ana Heredia, Howard Ratner, van Rossum, Paul Zema, Joerg, Brian Cody, Michal McCullough, Patrick Hargitt (facilitating the publication flow), Giotta (Discourse)		10	1 (Davin)		
5	KG	A focus on accessibility	guidelines and practices specific to sharing/publishing research data.	No				0		
6	KG	Data & Analytics, outcomes & budgets	Standards development of workflows	Not as is				0		
7	KG	Data & Analytics, outcomes & budgets	We might need to brainstorm around unintended negative network externalities and work towards recommended practices as policy guardrails	No				0		
8	JG	Discovery in an AI world	Metadata standards for AI data usage	Not as is						
9	KG	Data & Analytics, outcomes & budgets	standards around affiliation	Yes - with more detail				0		
10	JG	Controlled Digital Lending & New Models of Sharing	Standards or best practices in Controlled Digital Lending - From Discourse: "deriving a framework for a more "library friendly" licensing model."	Yes	<Wasn't asked in Chat apparently, but LOTS of chat> Mike Richins <Mike.Richins@exlibrisgroup.com>	SF, BB, AH, Sion, CH, AN, LisaJM, ChristineS, TB, PMurray	0 volunteers, some discussion	Bob B. Suggest separating controlled digital lending from other licensing initiatives and try a work item for CDL first.		11
11	JG	Privacy	Best practice document for overlapping/competing extranational privacy requirements	No				0		
12	NL	Relationship between Infrastructure, Protocols, Standards	JATS4R recommendation for tagging RRDs within JATS XML. The tricky thing is finding people with the combination of editorial understanding of this need and some production/tagging experience. Any advice?	Yes	Melissa Harrison, Paul Zema		2	0	Miranda-I may know someone at WK	
13	NL	Relationship between Infrastructure, Protocols, Standards	Citation of protocols: creation of best practice and socialization of ideas (same as data citation principles?) David Crotty mentioned some existing work at Nat Academies/BRDI that Todd is involved with. ("revamp the way that we report research methods")	Yes	Emma Ganley, Lisa Cuevas Shaw from JMIR (referred by Adrian Stanley - cuevasshaw@jmir.org), Adam Vials Moore [Jisc]	Alice, PF, BB, Michael Habib, TB, AK	3	0	Bob B. - I think I could volunteer someone from Springer Nature to work on this.	7
14	AM	Accessibility and ebooks	Accessible PDFs	No	Krista Coulson, Mike Gunn, Lieke Boerefijn		3	0 volunteers, some discussion		
15	AM	Innovative forms of scholarly publishing	a workshop on metadata for non-traditional outputs (whether that's IK or innovative forms of publication) would be very useful (and interesting!)	-ISH	Kath Burton (T&F), Michelle Urberg (Maverick), Andrew Joseph (Wits UP), Jamie Hutchins (IOPP), Alaina Wrigley (CDL)	Moon, Jack, MW	5	0	This would be best as a webinar or workshop without initial expectation of a work item. Needs exploration to see if any work item is possible. Community research was one of the central ideas here.	3
16	TAC		metadata for non-traditional outputs.	Yes		Alice, PF, SF, ChristineS, MichaelR,				6

Plan On It – February 15-17, 2022

NISO+PLUS 2022

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NISO Plus

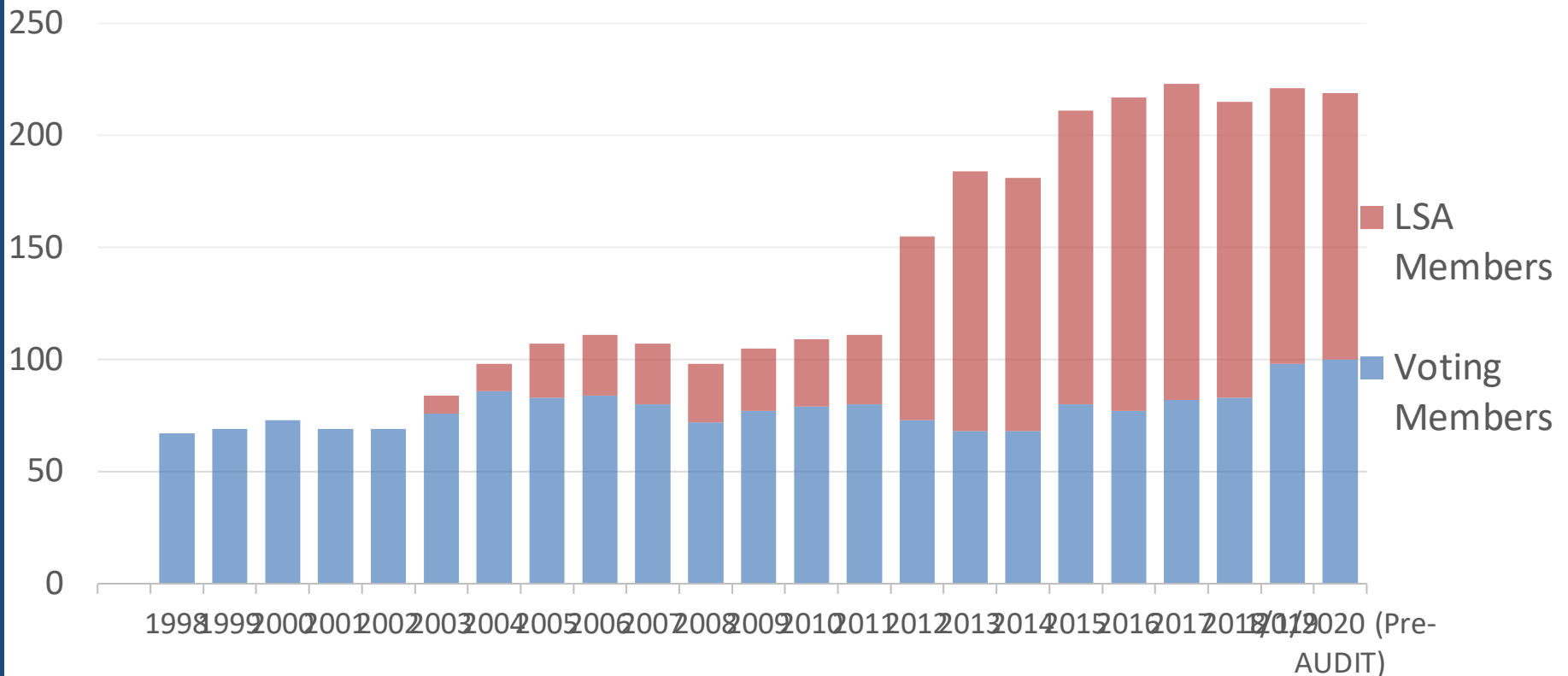
Global Conversations :: Global Connections

Join us online February 15-17, 2022

Membership Report

Membership Trends 1998-2020

NISO MEMBERSHIP 1998-2020



Stable Membership Trends

Nine new NISO Voting Members in 2020/2021

Altum

Erudit

File Open Systems

Lehigh University

International ISSN Centre

IOS Press

Open Athens

Scholastica

University of Delaware

CRKN Library Consortia added 74 new LSA members as a group

Eleven Non-Renewals of NISO Voting Members



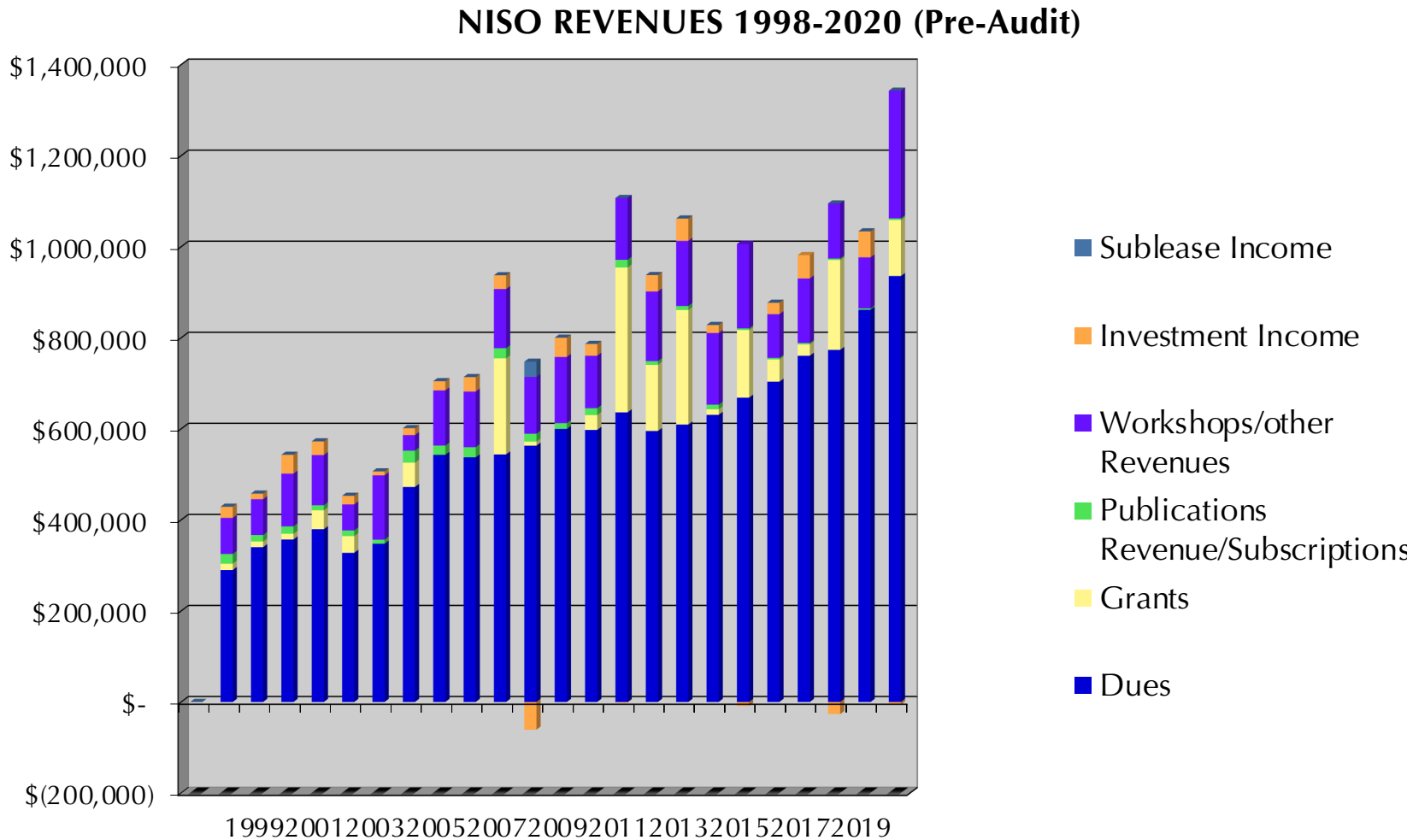
Studying Membership Dues in 2022

- Reviewing membership levels
- 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.
- Put off because of COVID-19 in 2020

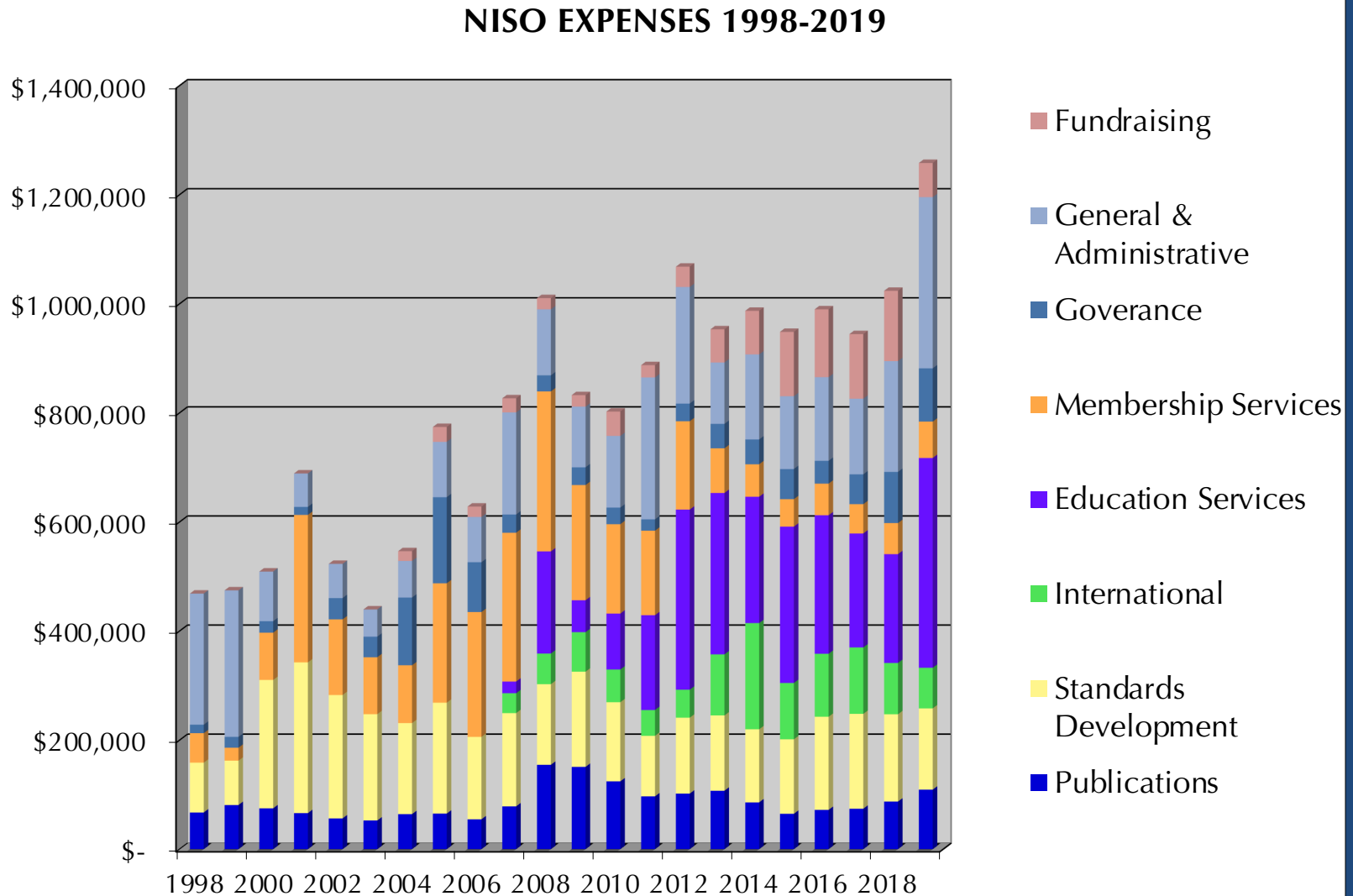


Report of NISO Finances

Financial trends 1998-2020

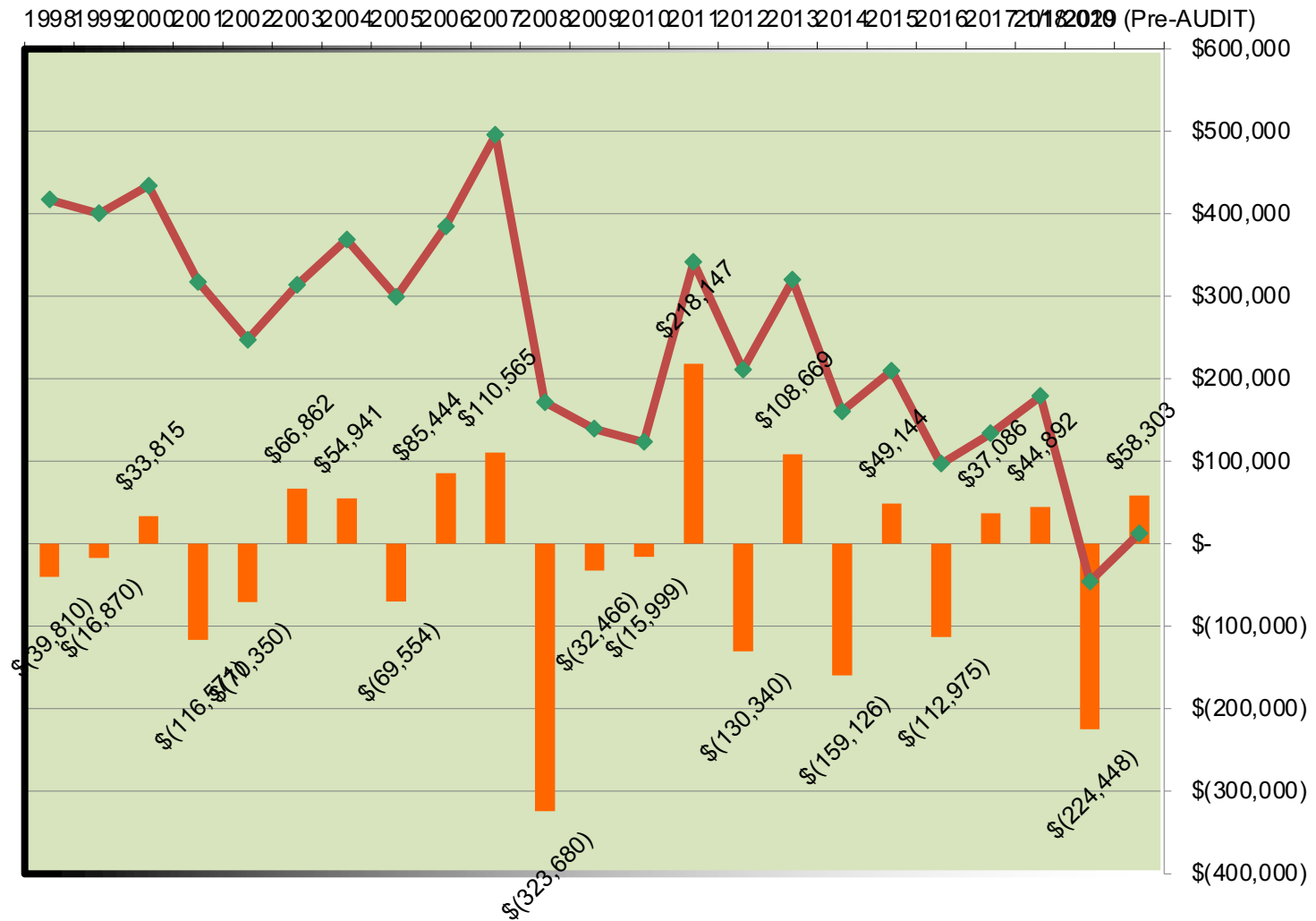


Financial trends 1998-2019



Financial trends 1998-2020

NISO NET ASSETS & ANNUAL SURPLUS/LOSS 1998-2020 (Pre Audit)



NISO DEI Initiatives

DEIA Committee

Co-Chairs

Karim Boughida, University of Rhode Island Libraries (USA)

Maria Stanton, Atla (USA)

Members

Avram Anderson, Macalester College (USA)

Apurva Ashok, Rebus Foundation (Canada)

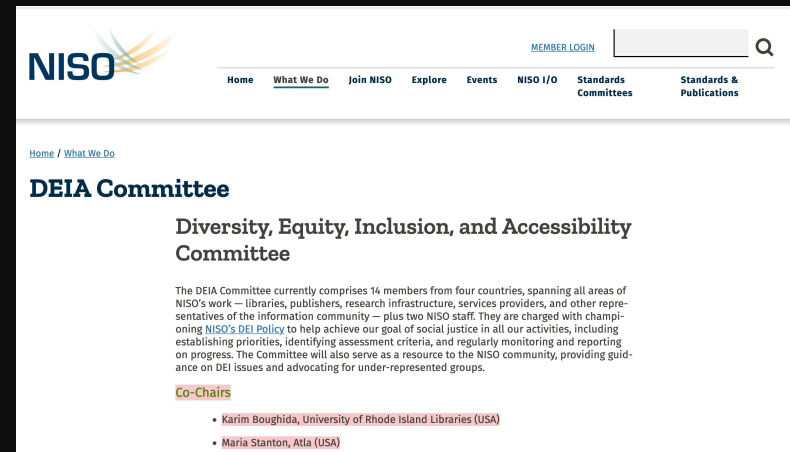
Camille Callison, (member of the Tahltan Nation),
University of Manitoba (Canada)

Ben Fiore-Walker, American Chemical Society (USA)

Gregory Grazevich, Modern Language Association (USA)

Cindy Hohl, American Indian Library
Association/Kansas City Public Library (USA)

Lorin Jackson, Swarthmore College (USA)



Michael Johnson, Benetech (USA)

Rebecca McLeod, Harvard Data Science
Review (USA)

Gabi Mejias, ORCID (Germany)

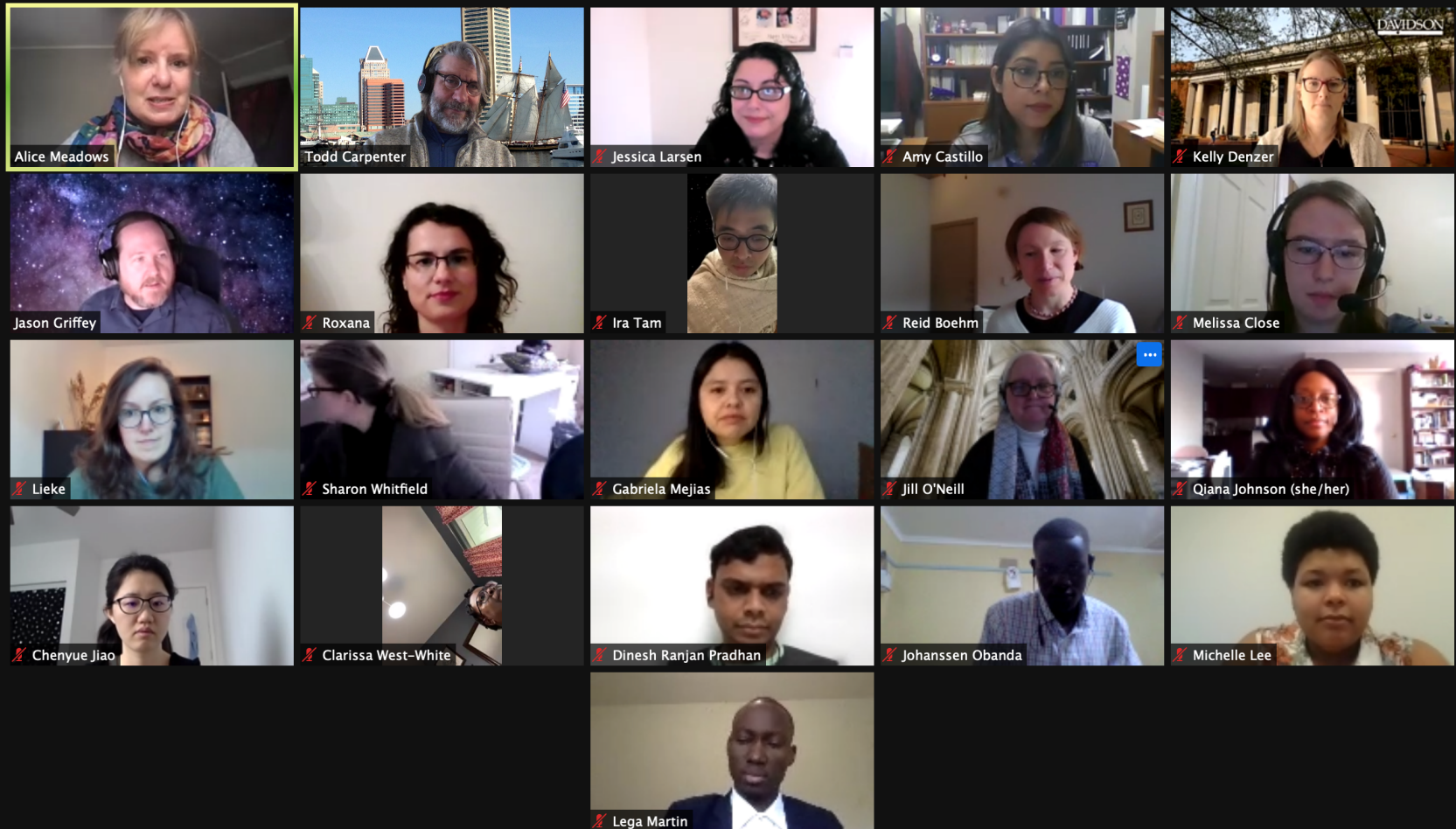
Rhonda Ross, Chemical Abstracting Service
(USA)

Gabi Rundle, Emerald Publishing (UK)

Wayne Strickland, National Technical
Information Service (USA)

Tony Zanders, Skilltype (USA)

NISO Plus Scholarship Program



NISO DEIA Work in 2021

- NISO DEIA Survey May-June 2021
- NISO is planning a virtual workshop to identify and prioritize concrete actions that NISO can take to support and increase diversity, equity, inclusion, and accessibility in the information community.
- Considering a variety of DEIA standards work
- NISO Joined C4DISC as Member Organization



NISO Standards Work

2020 Standards Completed

NISO RP-30-2020, Manuscript Exchange Common Approach (MECA) Recommended Practice

- PUBLISHED, July 6, 2020

NISO RP-19-2020 Open Discovery Initiative Revised Recommended Practice

— PUBLISHED, June 24, 2020

NISO RP-31-2021, Reproducibility Badging and Definitions.

- PUBLISHED, January 28, 2021

NISO Z39.96-2021 JATS: Journal Article Tag Suite [1.3] Revision Update

— Publication imminent

JATS4R recommendations as NISO Recommended Practice

- NISO RP-39-2021, JATS4R Peer Review Materials, Version 1.0***
- NISO RP-32-2019, JATS4R Subject & Keyword Guidelines v1.0***
- NISO RP-33-2020, NISO JATS4R Ethics Statements v1.0***
- NISO RP-34-2020, JATS4R Funding, Version 1.1***
- NISO RP-35-2020, JATS4R Preprint Citations, Version 1.0***
- NISO RP-36-2020, JATS4R Data Citations, Version 2.0***



2020 Standards Progressing

Revision of Indexing Standard (ANSI/NISO Z39.4)

- *Currently at Ballot, Closes on July 7, 2021*

NISO Z39.104-202X Contributor Roles Taxonomy (CRedit)

- *Balloting Closed on December 10, 2020. Resolving negative comments*

E-Book Bibliographic Metadata Requirements in the Sale, Publication, Discovery, and Preservation Supply Chain (E-Book Metadata)

- *Finalizing Draft after Public Comment Period in Fall 2020*

NISO Recommended Practice for Content Platform Migrations

- *Public Comment Draft March-April 2021*

NISO Recommended Practice for Access & License Indicators

- *Public Comment Period in July 2021*



2021 - New standards projects

- CREDIT Taxonomy Standardization
- Updating Author Name Changes after Publication
- Content Profile/ Linked Document Standard
- Revision of Journal Article Versions (JAV)
- Revision of Access & License Indicators (ALI)
- Standard Peer Review Taxonomy
- Seamless Access Contract Language
- KBART Phase 3
- JATS4R – Software Citation



New Standards Ideas Under Discussion

NISO PLUS 21 Outputs Ideas

- Controlled Digital Lending
- Publisher & Repository Interoperability
- Distribution of Retraction Information

Other Ideas

- Open Access Workflows
- Content Packaging identification
- Software identification
- Collaborative decision-making interoperability framework



To all those who engage in our work



NISO Educational Program

- **In 2020**

Provided expanded webinar registrations for members

Hosted free webinars on responding to crisis

Cancelled two spring in-person events

Successful virtual footing for Humanities Roundtable
with a free because of sponsors attendance model

36% increase in live participation.

12% increase in post-event views/downloads.



Welcome New NISO Directors (2021-24)

- **Maria Stanton**, Director of Production, Atla elected Vice Chair of the NISO Board.
- **Wayne Strickland**, Acting Associate Director for the Office of Program Management, NTIS will be appointed Treasurer on July 1.
- **Jonathan Clark**, Managing Agent, DOI Foundation
- **Trevor A. Dawes**, Vice Provost for Libraries and Museums and May Morris University Librarian, University of Delaware
- **Salwa Ismael**, Associate University Librarian for Digital Initiatives and Information Technology, University of California—Berkeley

Looking forward to 2022

- Several potential grant-funded projects coming out of the NISO-Plus outputs
- Expanding Diversity Equity & Inclusivity Efforts
- Continuing success of NISO Plus
- Realigning NISO's dues structure
- Working with consortia on library engagement



Open Discussion

Questions / Comments



Thank you!



Please reach out!

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