



2023 Membership Meeting NISO Annual Report of 2022 Activities

NISO Annual Meeting Webinar
June 29, 2023

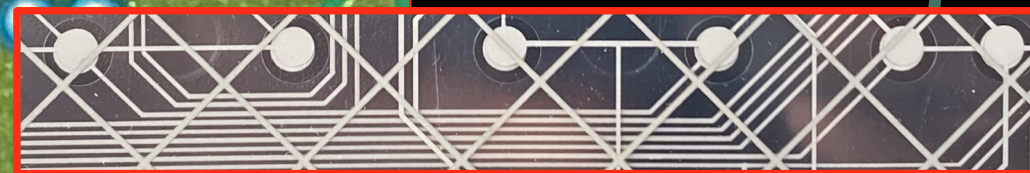
2023 Membership Meeting Overview

- ▶ NISO's Vision, Mission and Strategic Priorities
- ▶ 2022/23 Reflections
- ▶ NISO 2022 Membership – Mary Beth Barilla
- ▶ NISO 2022 Education & DEIA Initiatives – Kimberly Graham
- ▶ NISO Standards Program – Nettie Lagace
- ▶ NISO Plus – Jason Griffey
- ▶ NISO 2022 Finances
- ▶ Looking Forward 2023-24
- ▶ Open discussion of NISO activities

*NISO acknowledges that
the land on which our office sits in Baltimore is
rooted in the unceded, traditional territories of the
Piscataway, Susquehannock, and Nanticoke peoples,
as well as being the contemporary home to a living
community of Lumbee people.*

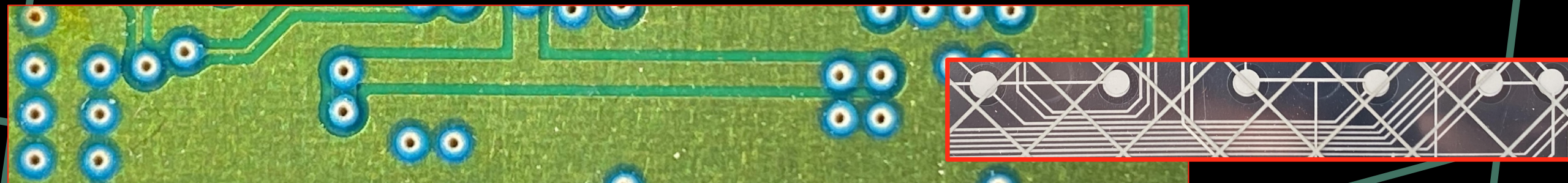
For more information, please visit: <https://native-land.ca>

NISO'S VISION



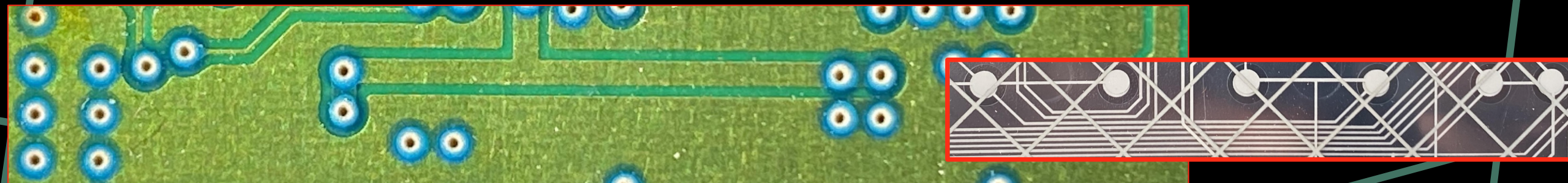
NISO's vision is a world
where all benefit from the
unfettered exchange of
information

NISO'S 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



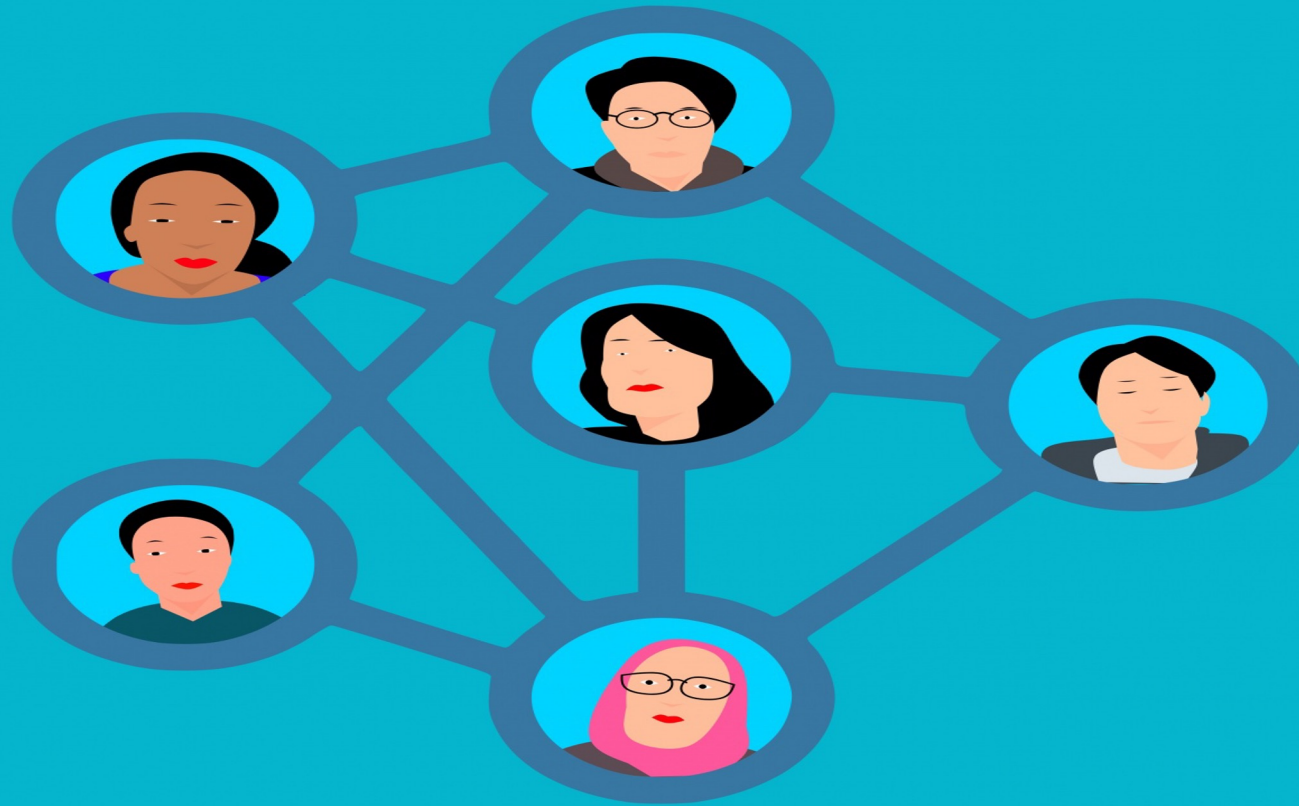
Effective Thought Leadership



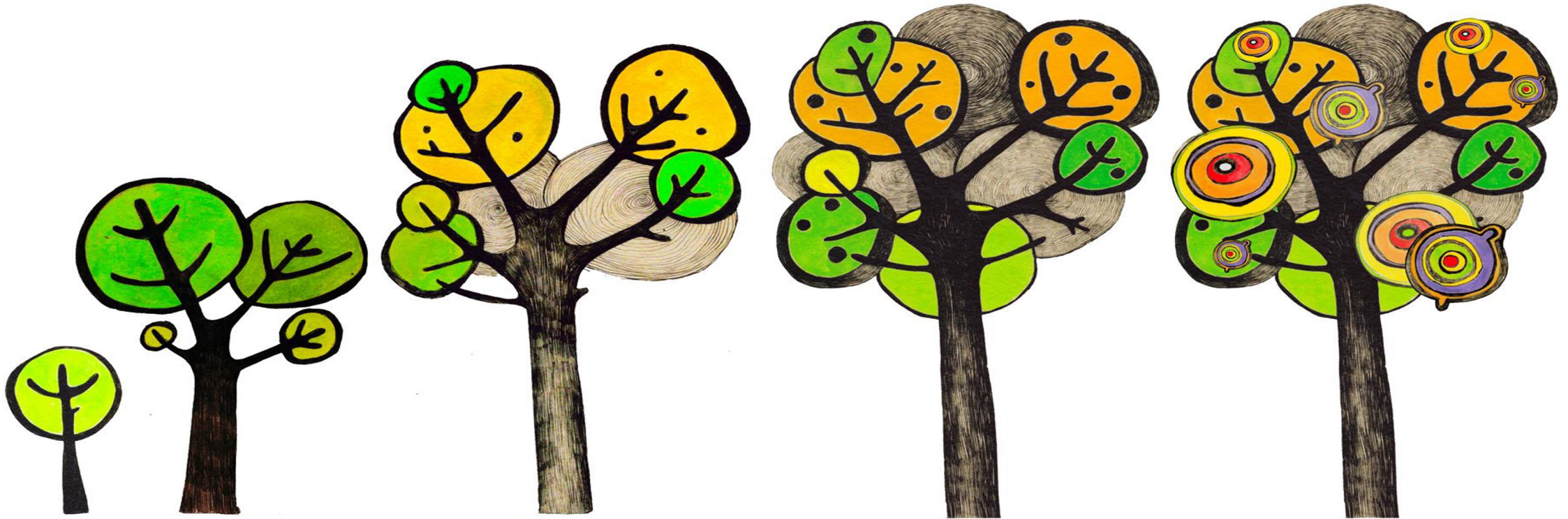
More Efficient With Standards



Community Development



Revising NISO's Strategic Plan



Developing New Strategy

Throughout 2023 a subcommittee of the Board has been meeting to discuss a revised strategic direction document.

While still a work in progress it is coalescing around two general themes and three key actions areas.

NISO is committed to diversity and providing high-quality guidance (standards/best practices) for the community.

In service of these two outcomes, we seek to build a stronger community, that provides leadership and thoughtful support, while seeking to grow strategically to enhance our capacity and sustainability.



Reflections on 2022-23

2022 What is “normal” anymore?

- ▶ The pandemic receded, and most of the restrictions have been lifted, with work, travel and project activities all at or beyond 2019 levels.
- ▶ NISO Plus Conference is continues to drive worldwide engagement and excitement, with more ideas that NISO could possibly pursue
- ▶ The “Great Resignation” hit NISO, with two team members departing, one for retirement, another for their own startup.
- ▶ NISO hired three new team members, with another shifting staff roles, so essentially 50% turnover in who was doing what at NISO.
- ▶ Secured two new grants in 2022, bringing in more resources than we had ever received, but also larger efforts
- ▶ Launched a new type of in-person event in the fall of 2022 expanding the NISO Plus brand

Welcome NEW NISO Staff

Welcome to:

Keondra Bailey started in October 2022 as NISO's Assistant Standards Manager

Lisa Jackson started in December 2022 as NISO's Office Manager

Mary Beth Barilla started in January 2023 as NISO's Director of Business Development and Communications

The NISO Staff



Lisa Jackson (she/her/hers)



Todd Carpenter



Keondra Bailey



Nettie Lagace (she/her)



Jason Griffey (he/his/him)



Sara Groveman (she/her/hers)



Kimberly Gladfelter Graham (she/her/hers)



Mary Beth Barilla (she/her)

2022-23 Running to keep up with demand

- ▶ NISO now has 28 active working groups and maintenance committees
 - ▶ By comparison, in 2009, NISO had 13 active projects
- ▶ NISO hosted 47 virtual events, two in-person events, and the NISO Plus Virtual Conference, or an average more than 4 per month
 - ▶ By comparison in 2009, NISO hosted 13 virtual events and 3 in-person
- ▶ NISO membership is now more than 1,000 organizations
 - ▶ By comparison in 2009, NISO had 109 members
- ▶ NISO Plus 22 generated more than 40 potential project ideas of varying quality.

NISO Standards Development work in 2022

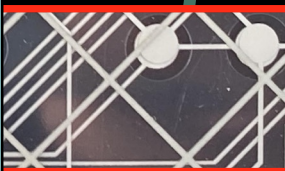
6 Newly Published RP or Standards

2 Drafts for public comment issued

4 New Projects Launched

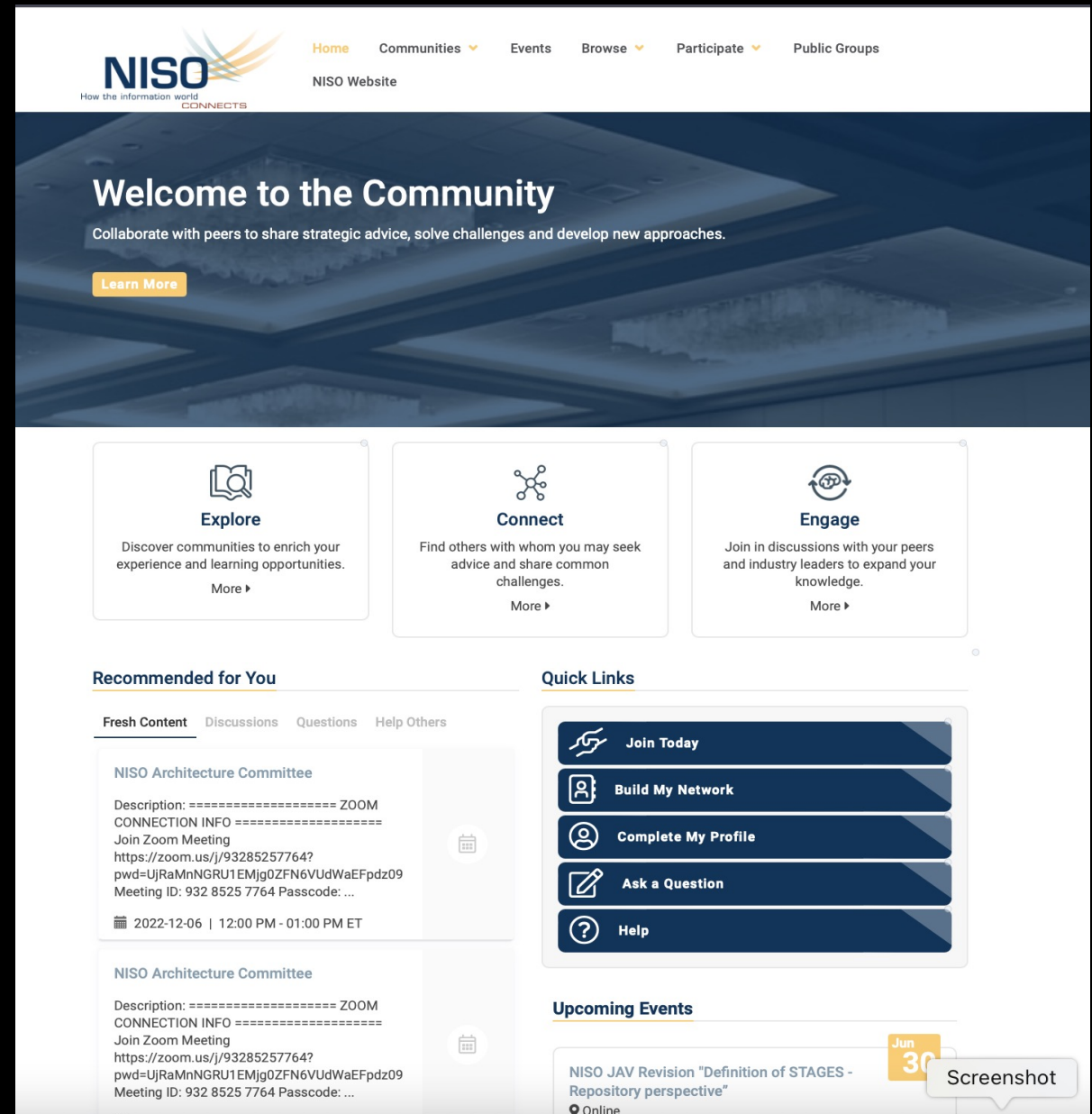
2 New Projects Funded with \$847,000 in Grant Support

2023 NISO PLUS

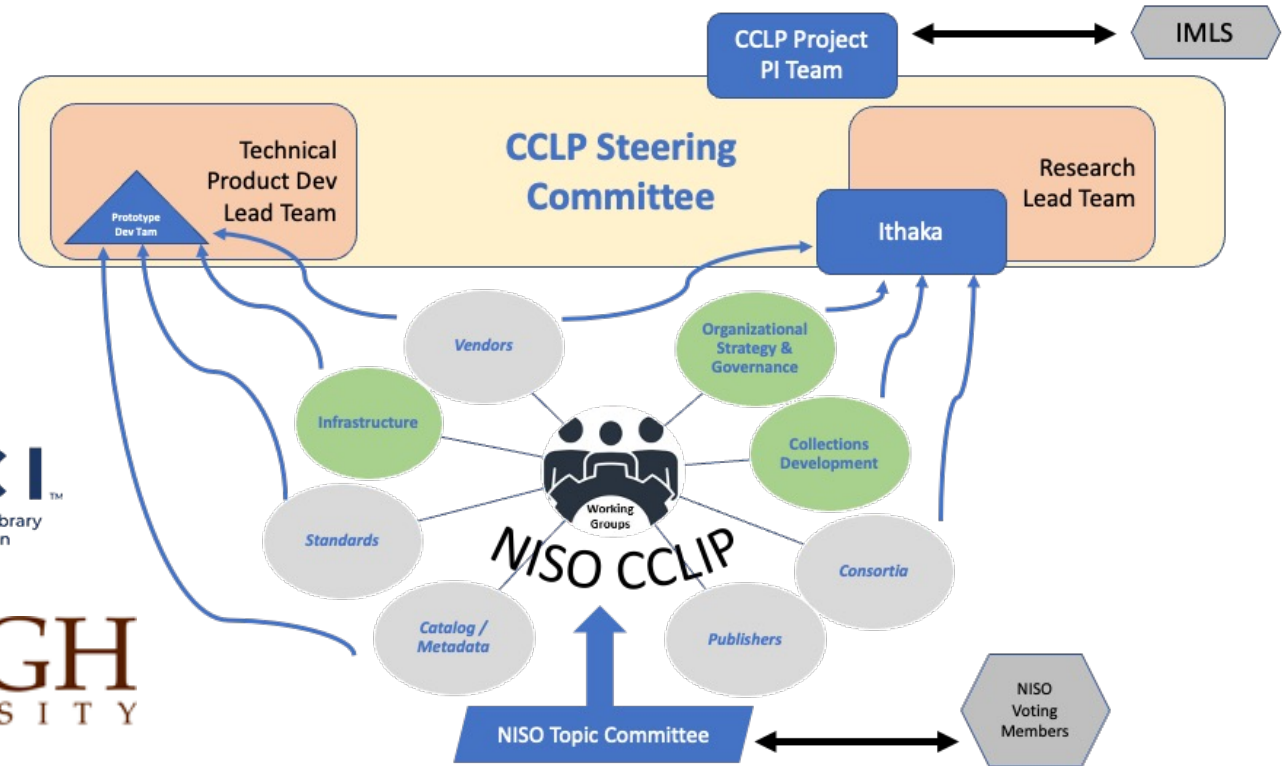


Migration to new Community Platform

In March of 2022, NISO migrated its back-end to a newer version of the document management and balloting system.

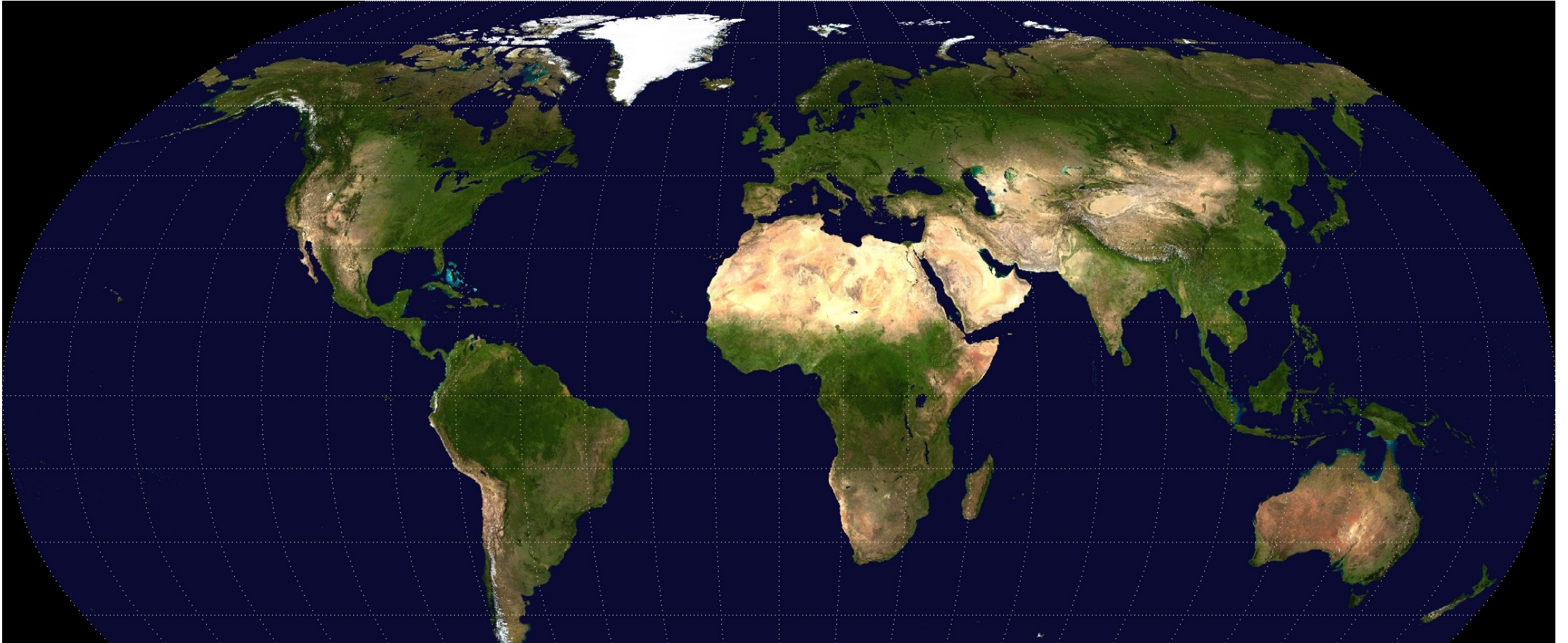


Seeking to improve library collaborative collections efforts with IMLS support

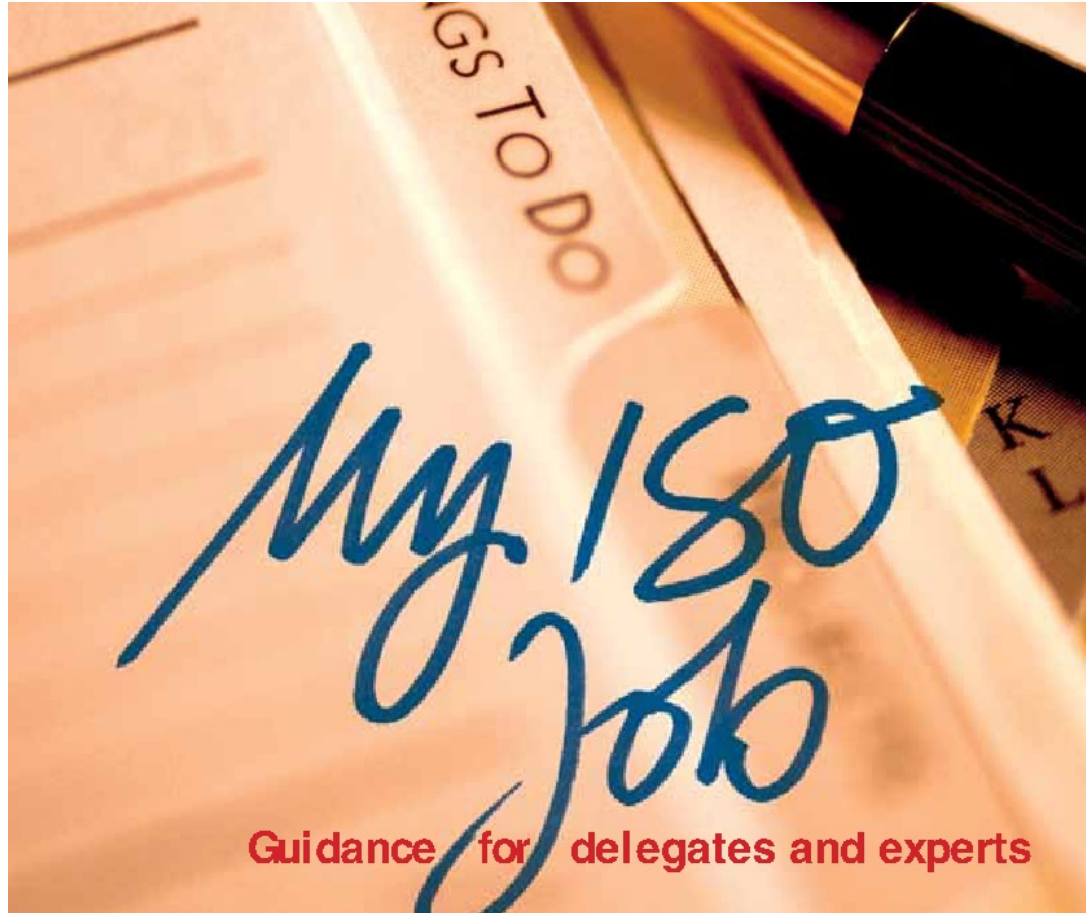


The CCLP project was made possible in part by the Institute of Museum and Library Services (IMLS) Grant #: LG-252384-OLS-22. For more information about this grant: <https://www.imls.gov/grants/awarded/lg-252384-ols-22>²⁴

It's a big world and it needs standards



NISO's Role in ISO, representing US interests



NISO is the US Technical Advisory Group determining US positions on ISO work in

ISO TC 46 Information and Documentation

- Technical interoperability (SC 4)
- Statistics and performance evaluation (SC 8)
- Identification and description (SC 9)
- Document storage and preservation (SC 10)
- Archives/records management (SC 11)

NISO Supports International Standards Development

NISO Serves as Secretariat for ISO TC 46/SC 9 Identification & Description

ISO TC 46/SC 9 Published:

- ISO/TS 22943 – Principles of identification

- ISO 23527 – Research activity identifier (RAiD)

and has begun work to revise/develop:

- ISO 25964-1, Thesauri and interoperability with other vocabularies

- ISO 999, Guidelines for the content, organization and presentation of indexes

- ISO CD 24138 International Standard Content Code

NISO and its members participated in 5 ISO plenary meetings, and engage on 30+ ISO working groups

Membership Report

Positive Membership Trends

Five new NISO Voting Members in 2022/23

American Mathematical Society

Amigos Library Services

Copyright Clearance Center

USMAI

PALNI

Six Non-Renewals of NISO Voting Members

Positive Membership Trends

Three New LSA members

Dartmouth College Library

Stony Brook University Libraries

University of California, Berkeley

Six Non-Renewals of NISO LSA Members

**Amigos Library Services added ~700 new
LSA members as a group**

Positive Membership Trends

New Membership Type:

Individual/Sole Proprietor

Informed Strategies

Kasdorf and Associates, LLC

Ken Rawson Consulting

Taxonomy Strategies

Education Report

Educational programs in 2022...

- 13 Monthly webinars
 - 2 8-part training series
 - 3 6-hour virtual conferences
 - 6 Training events on NISO projects
- 9 Open teleconferences
 - 2 In-person events (NISO Plus Forum & NISO-BISG Changing Landscape Forum)

2022 NISO Education Program

13 monthly webinars

- Webinars – benefit of membership
 - Do You Know Who Your Organization Webinar Contact Is?
 - Get notices of upcoming educational programs
 - Join your organization's group viewing
 - Get program recording if you can't make live or want to revisit content
 - kgraham@niso.org OR sgroveman@niso.org
 - Poll –
 - 55 minutes
 - 60 minutes
 - 90 minutes
- Members Rates for Virtual Conferences & Training Series

EDUCATION

- Programs survey results: “ Excellent/Very Good”
- Webinars – benefit of membership
 - Do You Know Who Your Organization Webinar Contact Is?
 - Get notices of upcoming educational programs
 - Join your organization’s group viewing
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Upcoming Educational Programs

- WEBINARS
 - August 2-Part
 - 8/9 - Metrics: Assessing Usage
 - 8/16 - Metrics: What Additional Metrics Are Needed?
 - September
 - 9/13 - Multilingual Content and its Use
 - And More...
- VIRTUAL CONFERENCE
 - Tech Summit October 25 – 26
- FALL TRAINING SERIES
 - Text & Data Mining



Education Committee



- Help Plan 2024 Program Topics & Schedule
- Help Lead One Webinar or Virtual Conference Program to Fruition
- Contribute to Speaker Candidate List
- Contact: kgraham@niso.org

Diversity, Equity, Inclusion & Accessibility

- DEIA Committee is a sub-committee of the NISO Board of Directors
- Efforts & Charges are defined by the NISO Strategic Priorities
- Goal & Priority
 - To ensure that everything diversity & inclusion is integrated in all NISO efforts, work, and programming
- Co-Chairs
 - Salwa Ismail
Associate University Librarian for Digital Initiatives & Information Technology
University of California, Berkeley, Berkeley Library
 - Bahar Mehmani
Peer Review Innovation Lead
Elsevier

Efforts

- DEIA Education & Events Sub-committee combined with NISO Education Committee
 - Implementing Inclusive Metadata
 - NISO-BISG Changing Standards Landscape 16th Annual Forum @ ALA: Diverse & Sustainable: How the Publishing Industry Evolves
 - Diverse Speaker Pool
- DEIA Standards Sub-committee meeting with NISO Architecture Committee
- C4DISC Toolkit for Disability Equity
- NISO Plus Scholarship Awardees

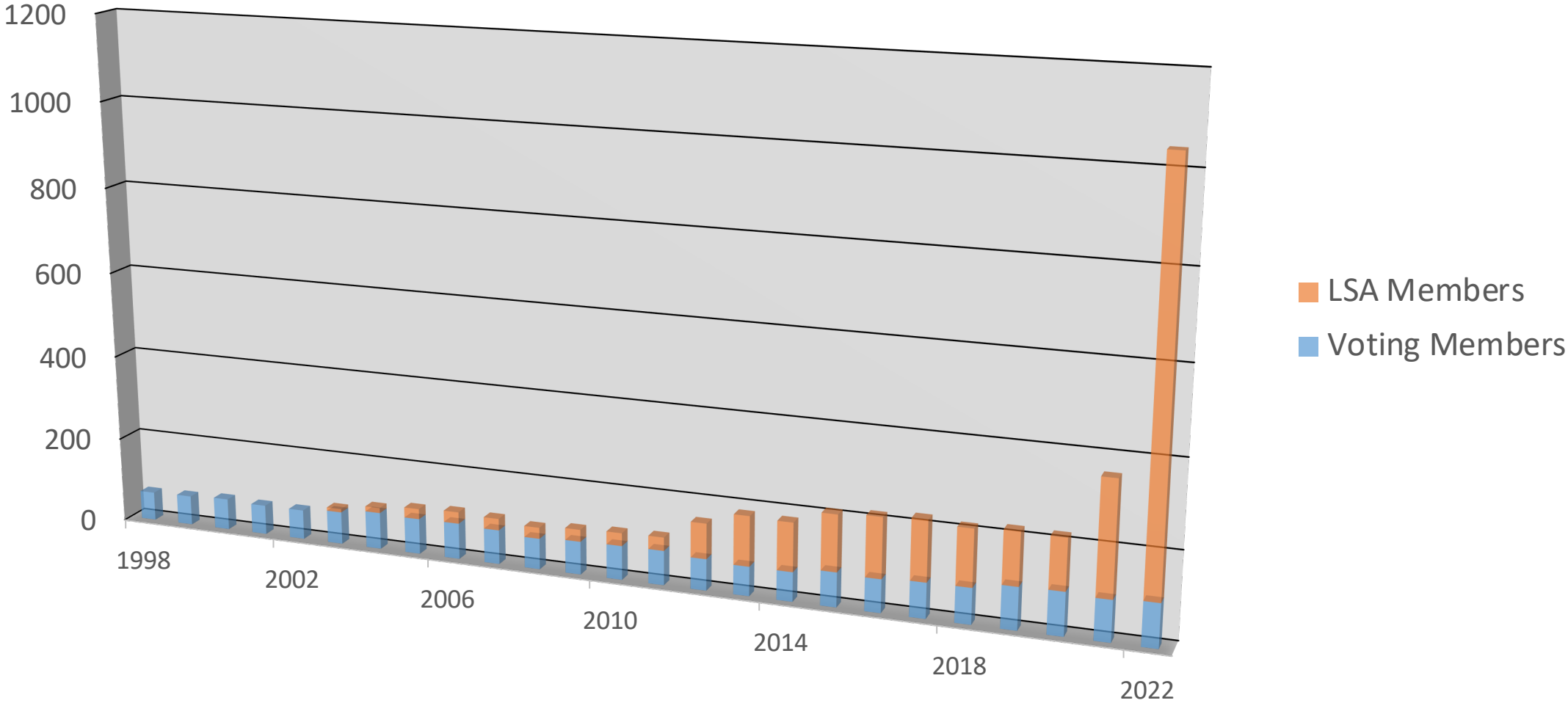


Standards Program Report

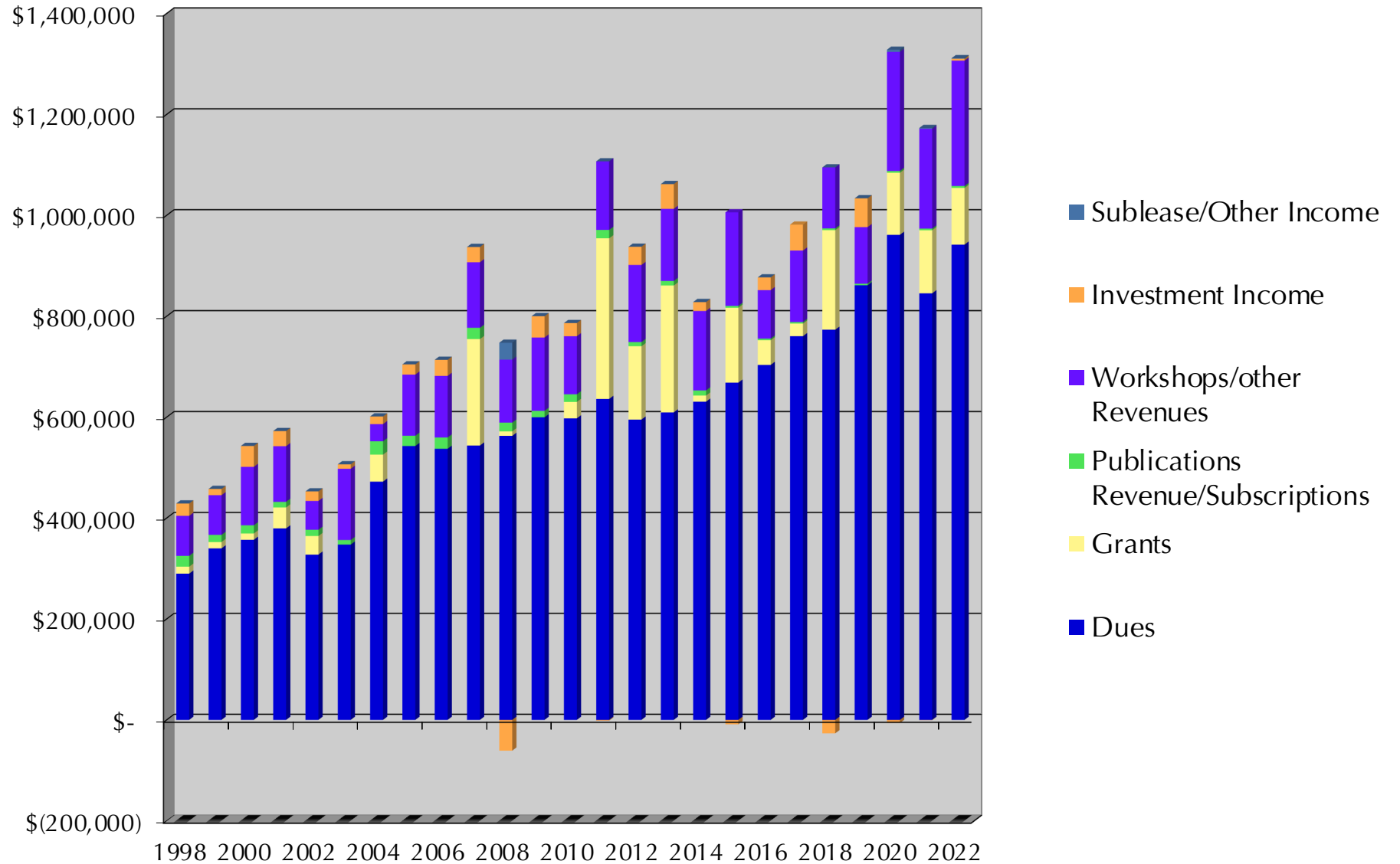
NISO Plus Report

Financial Report

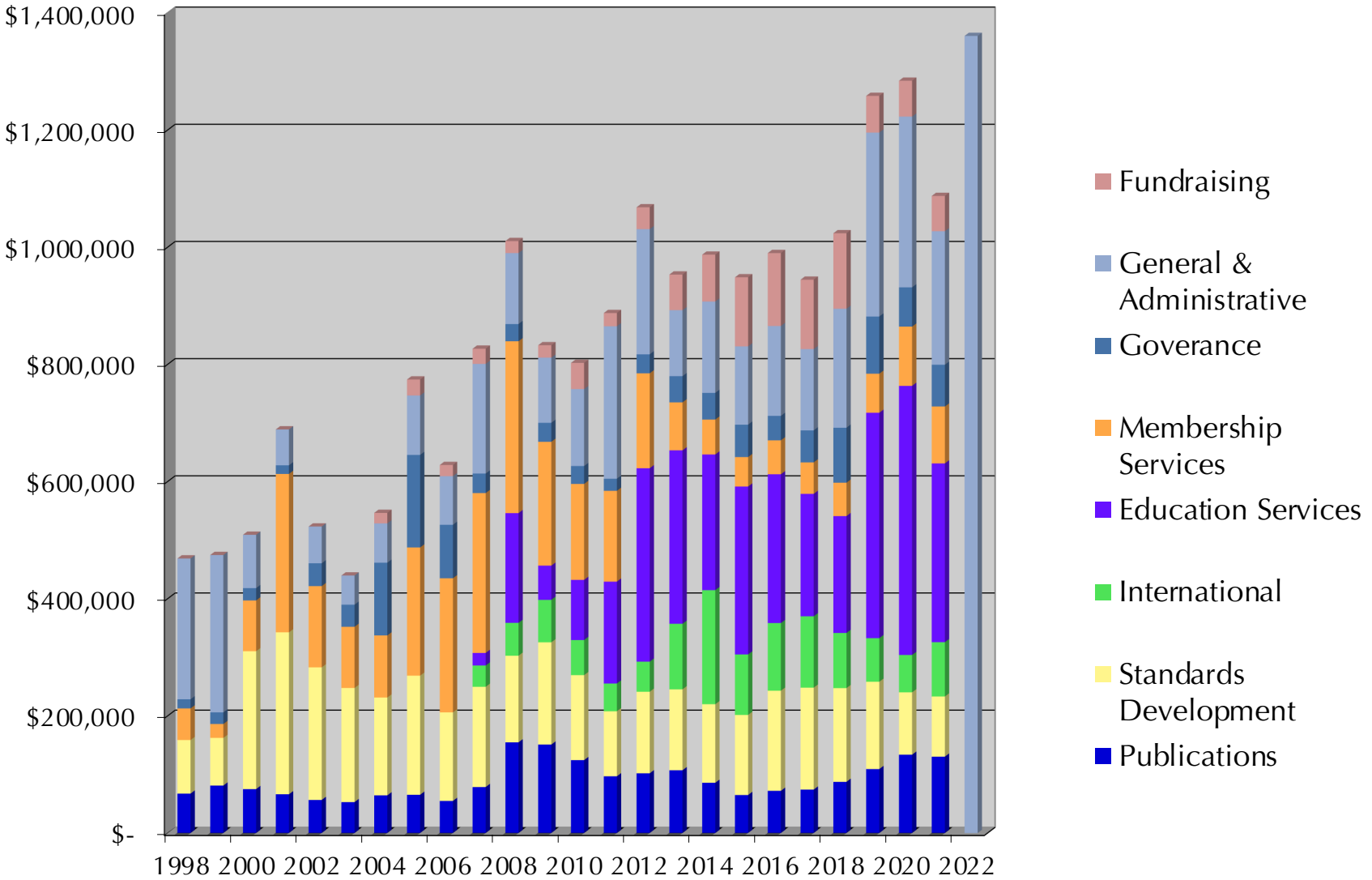
NISO MEMBERSHIP 1998-2022



NISO REVENUES 1998-2022 (Pre-Audit)

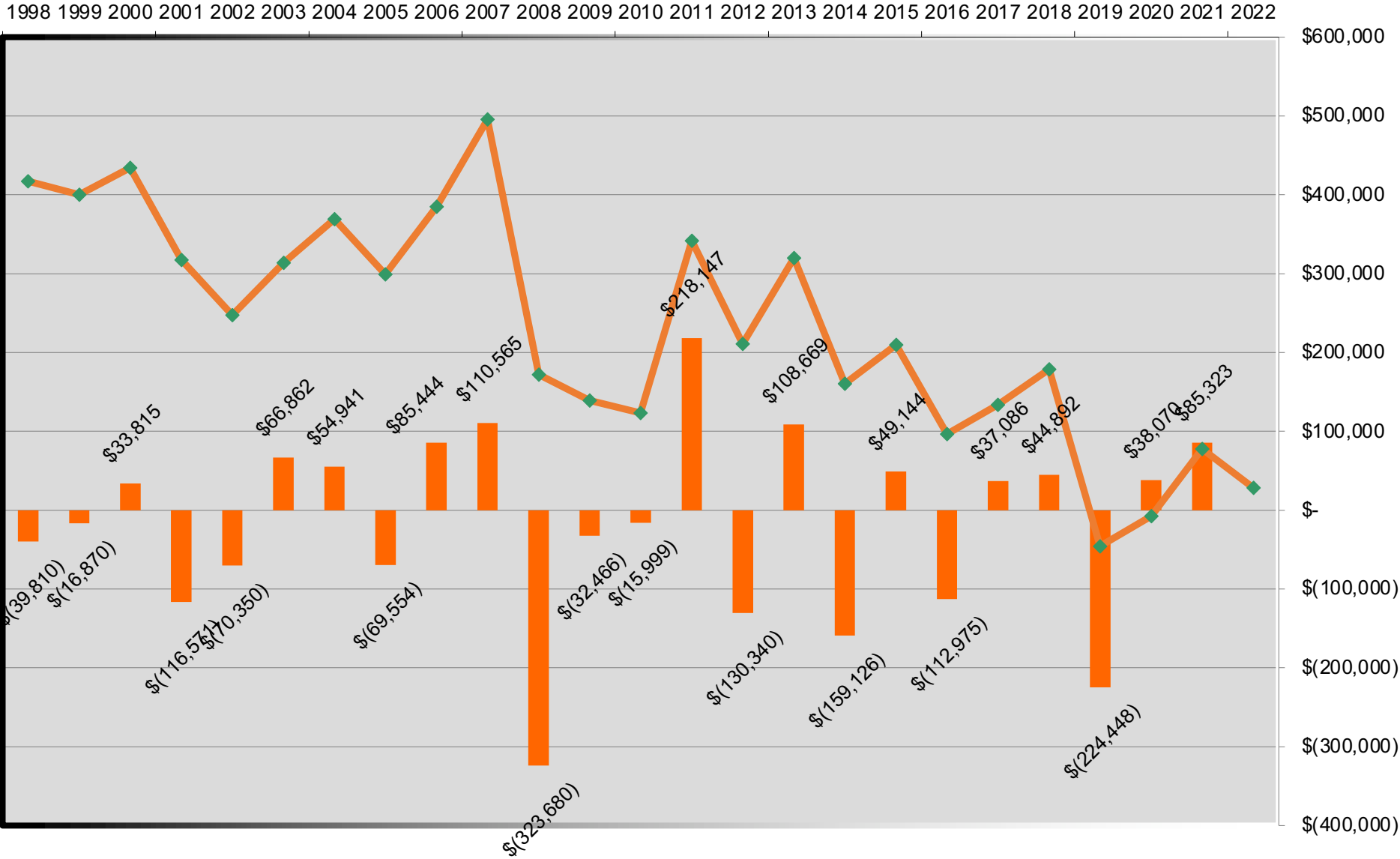


NISO EXPENSES 1998-2022 (Pre-Audit)



NOTE: 2022
Breakdown of
expenses isn't yet
available

NISO NET ASSETS & ANNUAL SURPLUS/LOSS 1998-2022 (Pre Audit)



Looking Forward

Welcome New NISO Directors (2023-26)

Robert Wheeler, Director, Publishing Technologies
American Society of Mechanical Engineers (ASME)
elected Vice Chair of the NISO Board.

Rebecca McLeod, Managing Director, Harvard Data Science
Review, Harvard University (re-elected)

Andrew Pace, Executive Director, University System of
Maryland and Affiliated Institutions

Mary Sauer-Games, Vice President, Product Management
OCLC, Inc. (re-elected)

Strategies for Growth

- ▶ Continue to build NISO's membership & engagement
 - ▶ Engaging new market segments for Voting Membership
 - ▶ Engaging internationally
 - ▶ Engaging with more libraries directly through consortial partnerships
- ▶ Focus on integration of DEIA throughout our work
- ▶ Continue to develop grant funding pipeline
 - ▶ Exploring several new ideas for grant proposals
- ▶ Extending NISO Plus Conference model by alternating in-person/virtual
 - ▶ Returning to an in-person annual conference
 - ▶ Continue NISO Plus Conference as virtual event in Fall 2024
- ▶ Extending partnerships with other organizations, such as ORFG

Other fun things on the horizon

- ▶ NISO Unfettered Access interview series
- ▶ Testing Generative AI tools in standards processes to make NISO more efficient
- ▶ NISO Office Lease is up in 2024
- ▶ NISO Value Study on the economic impact of NISO standards
- ▶ Integration of CARE principles for indigenous knowledge in the publication workflow
- ▶ US National persistent identifier strategy
- ▶ Continued development and integration of NISO back-end systems
- ▶ Continued development of NISO Plus Scholarship Program

To all those who engage in our work



Please reach out!

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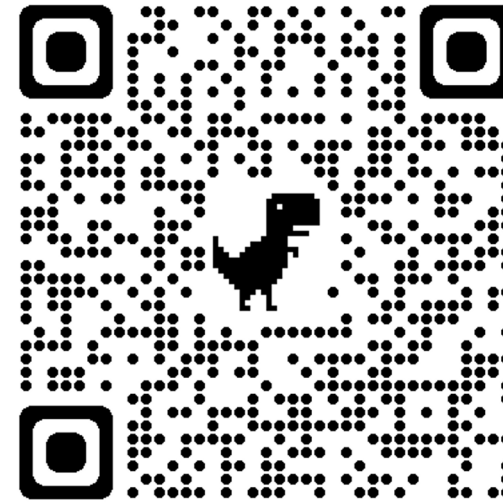
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- ▶ Educational Programs
- ▶ NISO Standards and Working Group Updates
- ▶ NISO Plus



Or Visit: <https://confirmsubscription.com/h/j/16B94AB10EFACDB2>

THANK YOU

Thank you to all of our attendees
for engaging with NISO and the community in our work and for joining us
today!

Please stay in touch!