

Proposal for Ballot by NISO Voting Members

Ballot Dates: December 19, 2007 – January 18, 2008

If approved, this proposal will result in the formation of a joint NISO/UKSG Working Group.



Proposal for UKSG Knowledge Base Working Group

In light of the recent UKSG report into Link Resolvers, we propose to form a working group comprising representatives from each of the parties active in the supply and use of knowledge bases, namely:

- Link resolver vendors
- ERM system suppliers
- Publishers
- Libraries & library consortia
- Subscription agents
- Aggregators
- Other organisations such as NISO and CrossRef

Our proposal for working group members is enclosed. It is our intention to support UKSG's strategy of international expansion by inviting a number of non-European representatives to join the working group.

Key points:

1. the scope of the project has been expanded to include other users of knowledge bases, for example electronic resource management (ERM) system suppliers
2. we are minimising reference to *serials* in order to acknowledge the wider range of materials to which the guidelines we develop could usefully apply.
3. the UKSG is not a standards group and does not intend to present itself as one. The working group's remit, expanded below, primarily revolves around advocacy and guidance. We hope NISO will be a key contributor.

Remit of proposed working group

1. Best practice guidance.

To develop guidelines for best practice to effect smoother interaction between members of the knowledge base supply chain.

Unlike other initiatives in the information industry, e.g. Projects COUNTER and Transfer, it is not necessary or desirable to require adherence to a standard, as many parties in the chain are already engaging effectively with one another and should not be compelled to comply with an alternative format.

2. Education.

To provide educational events and centralised information, the better to inform all parties in the chain of the functions and needs of their channel partners, and in so doing to indicate their own obligations.

Valuable information tools might include:

- Glossary
- Entry-level explanation of OpenURL: purpose, methodology, value

- Introduction to knowledge base supply chain parties: roles, needs, responsibilities, value
- "How to" guides: outputting holdings data etc.
- Links to other (selected) OpenURL literature
- Guidelines for best practice: knowledge base format and terms of provision; inbound linking syntax
- Relevance of other standards/initiatives/technologies e.g. ONIX, metasearch
- Contact details of those willing to provide assistance to the bewildered

3. Advocacy

To advocate for timely provision of comprehensive, accurate knowledge bases by publishers, the better to serve their library customers' needs.

To use the influence and neutral position of UKSG to add credibility to the working group's mission and to provide effective marketing of its deliverables.

Proposed roadmap for working group

Activities	Tentative delivery schedule
Agree proposals with UKSG; revise as necessary	September 2007
Invite proposed working group members; augment as necessary	October 2007
Circulate SIS report and working group remit to working group members	October 2007
Set up email list for communications within the group	October 2007
Hold initial working group meeting (face-to-face)	November 2007
<ul style="list-style-type: none"> ▪ Develop initial remit (selectively) based on feedback from working group members 	
<ul style="list-style-type: none"> ▪ Identify key areas for consideration and agree outline tasks ▪ Allocate sub-groups to tasks/areas 	
Ongoing: further meetings (by phone as necessary) and interim email discussions	Monthly phone meetings Second face-to-face meeting?
<ul style="list-style-type: none"> ▪ Progress on tasks identified in initial meeting(s), for example, creation of web presence; delivery of supporting collateral 	
Ongoing: interim progress reports to UKSG committee	As required
Ongoing: promotion of project through press activity, interviews, speaking engagements, article publication etc	Ad hoc
Completion of initial task list	March 2008 (ideally, in order to announce at UKSG Conference in April 2008)
Potentially: identification of further activities	April 2008

Proposed working group members

Link resolvers/ ERMs	OCLC/Openly	Eric Hellman	eric@openly.com
	TDNet	Einat Hulati	einat@teldan.com
	Ex Libris	Nettie Lagace	nettie@exlibris-usa.com
	Serials Solutions	Peter McCracken	petermccracken@serialssolutions.com
	Innovative	Ted Fons	tfons@iii.com
Publishers	SAGE Publications	Simon Haggis	Simon.Haggis@sagepub.co.uk
	Nature	Tony Hammond	t.hammond@nature.com
	Wiley-Blackwell	Cliff Morgan	cmorgan@wiley.co.uk
	The Royal Society	Matthew Llewellyn	
	BEPress	Sean O'Doherty (may recommend s/o else)	sean@bepress.com
Agents	Swets	Bill Hoffman?	w.hoffman@swets.nl
	EBSCO	Oliver Pesch	opesch@web.ebsco.com
	Harrassowitz		
Libraries	UEA	Nick Lewis	nicholas.lewis@uea.ac.uk
	Manchester	Ann Apps	ann.apps@manchester.ac.uk
	Edinburgh	Tim Stickland	Tim.Stickland@ed.ac.uk
	Claremont Colleges	Jason Price	jprice@libraries.claremont.edu
	U. Texas Austin	Jill Emery	j.emery@austin.utexas.edu
Intermediaries/ aggregators	Publishing Technology	Charlie Rapple	charlie.rapple@publishingtechnology.com
	Xrefer	Jenny Walker	jenny.walker@xrefer.com
	JSTOR	Bruce Heterick	Heterick@jstor.org
Consortia	OhioLink	Tom Dowling	tdowling@ohiolink.edu
	Finelib	Ari Rouvari	ari.rouvari@helsinki.fi
	California Digital Library	Margery Tibbets	margery.tibbetts@ucop.edu
Related organisations	NISO	Todd Carpenter	tcarpenter@niso.org
	CrossRef	Ed Pentz	epentz@crossref.org
	SIS	James Culling	james.culling@oup.com
		(unlikely to agree but polite to propose – Simon Inger as backup)	