Forging a New User Group

SMUG/NAAUG/ICAU Issues
Three Perspectives

- Thumbnail history of SMUG (the SFX-MetaLib Users Group)
- Merging SMUG with ICAU (The International Consortium of Aleph Users)
- Merging SMUG/NA with NAAUG (The North American Aleph Users Group)
  - SMUG Action/response
A Group is Born!

- Impromptu meeting at ALA Midwinter 2002
A NAME?

Group to Extract Electronic Knowledge from Systems
GEEKS!
Sfx-MetaLib User
Group
smug
Why a Separate User Group?

- Half the attendees did not use Aleph
- The “A” in NAAUG and ICAU stood for “Aleph”
- Some concern on the part of Ex Libris about users of other ILSs at NAAUG/ICAU
- We initially wanted an single international SMUG organization
- 1st step – asked for a volunteer SMUG Steering Committee
  - Include non-Aleph users
  - Include international users
SMUG Steering Committee

- Judy Briden – Univ. of Rochester
- Nikki Crowster – Calico (S. Africa)
- Stephen Lohrum – ZIB (Berlin)
- Heather McBurnie – Calico
- Jim Mouw – Univ. of Chicago
- Paul Soderdahl – Univ. of Iowa
- Owen Stephens – Royal Holloway – London
- Marco Streefkerk – Univ. of Amsterdam
- Margery Tibbetts – CDL
- John Webb – Washington State University
- Larry Woods – Univ. of Iowa
Brief SMUG History

- 2002 - ALA Midwinter (New Orleans?)
- 2002 - Boston College
  Paris, France
- 2003 - Iowa
  Vienna, Austria
- 2004 - Cambridge
  Porto, Portugal
- 2005 - Maryland
  London, England
National SMUG Groups Proliferate

- SMUG-UK
- AusSMUG
- German-Speaking SMUG (SMUG 4 EU)
- Others?
SMUG Activities

- Two annual meetings (N.A. and Europe)
- www.smugnet.org
- SFX-MetaLib Discussion List
- ARMPIG (ARL MetaLib Portal Implementers Group)
- MetaLib User Interface Focus Group
Problems

- The annual meetings GREW! (60-200)
- Informal membership meant no dues revenue
- All expenses had to depend on meeting registration
- The length of the consecutive meetings (6 days in Cambridge!)
- New products began to emerge that could also require their own user group (DigiTool, Verde, etc)
TWO SOLUTIONS

- Create a formal SMUG organization
  - Draft C&B
  - Registering the organization
    - North American SMUG or international SMUG?
    - Which country?

- Merge with NAAUG and ICAU
  - Initial proposal to merge with NAAUG at Cambridge SMUG meeting - 2004
  - Proposal to merge with ICAU at Porto SMUG meeting - 2004
Merging SMUG with ICAU

- Amsterdam meeting in February
  - Joint ICAU/SMUG Steering Committee

- Joint meeting in Kos
CHRIS
Guiding Principles

- **SIMPLICITY** - easy to manage as the user group grows in numbers and complexity
- Increase the membership in the organization
- National User groups are free to merge or not merge
Structure of new international user group

- Umbrella User Group (LU - International Group of Ex Libris Users)
  - Product Working Groups (Aleph, SFX, MetaLib, DigiTool, Verde, etc.) - Formal
    - Annual meeting content
    - Enhancements
    - Self – organized
    - Led by a Coordinator

- Special Interest Working Groups (Public Libraries, Consortia, etc.) - Informal
Steering Committee

- Eight Elected Members, including a Chair
- Two year terms (can serve 3 consecutive terms, if elected)
Membership

- Any institution or group of institutions using one or more Ex Libris product can join.

- All members have the same voting rights and have same number of votes on all issues.
The Process

- Posting of the proposed C&B on the ICAU and SMUG websites
- Presentation to the user community at the London ICAU/SMUG meeting in September 2005.
- Users (Aleph and SMUG) join the new organization in January 2006
- Extended Steering Committee members elected at the joint conference in Stockholm – September 2006
Structure of proposed North American User Group

- Umbrella Group representing all users (proposed name – ELUNA – Ex Libris Users of North America)
- Product Groups for each product
  - Aleph
  - SFX/MetaLib? (together or separate?)
  - DigiTool
  - Verde
  - Others?
- Special Interest Groups
  - Consortia
  - Research Libraries
  - Law Libraries
  - Etc.
Membership

- Any “institution” that is entitled to use one or more Ex Libris products under the terms of a contract
  - Any individual library or group of libraries that are separately administered
  - A consortial office or server site
- All members have equal rights
Steering Committee

- Eight members elected at large
- All members represent all products
  - Effort to see that all products are represented
- Offices elected by SC members
  - Chair
  - Past Chair
  - Vice Chair/Chair-Elect
  - Secretary
  - Treasurer
  - IGLU Liaison
  - Enhancements Chair
  - Liaisons to each Product Group
SMUG Tasks

- Approve/disapprove merger in concept (straw vote)
- If approve:
  - React to proposed C&B in Fall
  - Approve proposed C&B late fall
  - Join new organization
  - Decide if we want to form one or two product groups
  - Plan SMUG content of 2006 meeting in Knoxville
  - Organize ourselves under new organization
  - Discuss options for enhancements
- If disapprove:
  - Plan next step(s)
- In either case – Plan Knoxville meeting
  - Maribeth Manoff
  - Others?
Transitional Issues

- Transition Task Force
  - NAAUG – Donna Hirst, Carlen Ruschoff, Chris Meyer, Nina Davis-Millis
  - SMUG – Bob Gerrity, Jim Mouw, Larry Woods

- Proposed timetable
  - Draft C&B – early fall
  - Approval of C&B – late fall
  - Membership in new organization open – January 2006

- June 2006 – Merged meeting in Knoxville under the new organization
  - Three (?) day meeting with multiple tracks
Questions - Larry-woods@uiowa.edu