Forging a New User Group

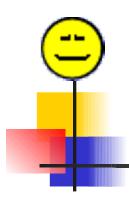## SMUG/NAAUG/ICAU Issues

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)
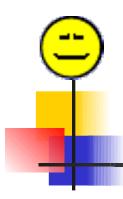
  - SMUG Action/response

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)
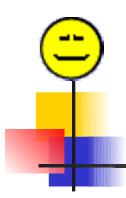
- MetaLib User Interface Focus Group

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

- S I M P L I C I T Y - 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 (IGeLU - 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
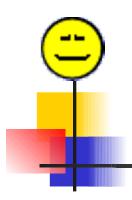
Steering Committee

- 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
    - IG LU 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

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