Electronic Resource Management in Libraries: Research and Practice

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Published in the United States of America by
Information Science Reference (an imprint of IGI Global)
701 E. Chocolate Avenue, Suite 200
Hershey PA 17033
Tel: 717-533-8845
Fax: 717-533-8661
E-mail: cust@igi-global.com
Web site: http://www.igi-global.com

and in the United Kingdom by
Information Science Reference (an imprint of IGI Global)
3 Henrietta Street
Covent Garden
London WC2E 8LU
Tel: 44 20 7240 0856
Fax: 44 20 7379 0609
Web site: http://www.eurospanonline.com

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Library of Congress Cataloging-in-Publication Data

Electronic resource management in libraries : research and practice / Holly Yu and Scott Breivold, editors.
p. cm.

Summary: "This book provides comprehensive coverage of the issues, methods, theories, and challenges connected with the provision of electronic resources in libraries, with emphasis on strategic planning, operational guidelines, and practices. Its primary focus is management practices of the life-cycle of commercially acquired electronic resources from selection and ordering to cataloging, Web presentation, user support, usage evaluation, and more"--Provided by publisher.

Includes bibliographical references and index.

1. Libraries--Special collections--Electronic information resources. 2. Electronic information resources--Management. I. Yu, Holly. II. Breivold, Scott.

Z692.C65E425 2008
025.2'84--dc22

2007036853

British Cataloguing in Publication Data
A Cataloguing in Publication record for this book is available from the British Library.

All work contributed to this book set is original material. The views expressed in this book are those of the authors, but not necessarily of the publisher.
Chapter II
Strategic Planning for Electronic Resource Management

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ABSTRACT

This chapter addresses electronic resource management from the perspectives of planning, policy, and workflow issues experienced by libraries. Many libraries attempt to transfer and incorporate the print workflow onto electronic resource management. The result is a feeling of chaos and lack of control. The challenges, methods, and impacts on electronic resource management perceived by libraries are described. The authors suggest methods and ideas to address these topics that may help libraries create a sense of order for electronic resource management.

INTRODUCTION

An overarching theme with electronic resource management is the rapid growth of electronic resources. Because of this growth libraries are experiencing issues related to time management, staffing, and the time-honored task of deliberating the set-up of logical workflow systems for such resources. Unlike the traditional library workflow of ordering and paying for print resources, cataloging those items, and processing them for the shelves—a workflow in which the different library units know their roles and responsibilities—most libraries consolidate all things electronic such as A-Z title lists, federated search engines, e-journals, abstract-and-indexing databases, dark archives and electronic resource management tools, and allow an electronic resources librarian to handle most, if not all, responsibilities from pre-order activities to access set-up and maintenance.

When all these activities are left in the care of one or two people in a library, many of these librarians are unsure what to do. Chaos reigns. The managers of electronic resources are putting
out fires rather than conducting fire prevention activities and education. They need to break down the chaos into pieces that can be controlled and managed. They need to let some fires rage and work on preventing the next ones from happening. They need to step away, get some fresh air, and find some calm in the chaos.

This chapter reviews electronic resource management, defined as overseeing all aspects of electronic resource management from pre-selection activities such as trials and initial vendor inquiries to renewal/cancellation decisions, from the perspectives of planning, policy, and workflow issues experienced by many libraries. Each of these topics discusses some of the challenges perceived by libraries, the methods libraries use to address these challenges, and the impact of these challenges on electronic resource management.

BACKGROUND

Electronic resource management may be defined in various ways. The definition may be as narrow as an A-to-Z list of serial titles (Marshall & Kawasaki, 2005), a focus on an approach to budget management (Jasper & Sheble, 2005), or a broader concept like a content management system to create Web pages, provide administrative functions, and track license agreements (Brown, Nelson, & Wineburgh-Freed, 2005; Robbins & Smith, 2004). While there is a great deal of literature devoted to various types of electronic resources, particularly to electronic journals (Burrows, 2006; Curtis, 2005; Curtis, Scheschy, & Tarango, 2000; Fowler, 2004; Islam & Chowdhury, 2006), very little has been written about electronic resource management in a more holistic sense, with the exception of two books on the topic.

Conger’s (2004) book provides an in-depth discussion on collaborative learning, management of staff, and group participation related to electronic resources work. She addresses leadership and management, budgeting as planning, the infrastructure and tools of electronic resource management, as well as cataloging and technology needs. The purpose of the book is to instruct library professionals on the incorporation of electronic resource assessment as a continuing learning process, and how to use that learning process to make electronic resource management more stable within a library. Gregory’s (2006) revised edition of Selecting and Managing Electronic Resources provides descriptions and checklists for policies, selection, budgeting, cataloging and access, and assessment. It supplies a number of details that are helpful in the formation of effective electronic resource management workflow.

As Collins (2005) notes, the growing number of electronic resources requires more sophisticated workflows and is changing the nature of work for many professional librarians into that of workflow managers for updating and maintaining A-to-Z lists, vendor MARC records, and openURL. She foresees the electronic resource management tools as a means to allow the OPAC to become the comprehensive access point for library resources again. In particular, Collins stresses the importance of implementing various management tools and allowing flexibility in cataloging practices and workflow, such as what a library will accept in the OPAC. For example, brief MARC records may be a better option for the cataloging of electronic resources because they allow for a faster, timelier entry into the system that also streamlines the cataloging workflow (Curtis, 2005, pp. 288-289).

Beyond the cataloging part of the electronic resources workflow, there are other workflow functions unique to electronic resources management. These tasks include licensing, access set-up, troubleshooting, link maintenance, inter-database linking (e.g., between catalogs, abstract-and-indexing databases, federated search tools, openURL resolvers), vendor negotiation—the list is extensive, but has been summarized by Curtis (2005, pp. 97-98) from Duranceau and Hepfer’s survey results (2002) on electronic resource
management staffing. Obviously workflow for electronic resources is quite different from the traditional resource management workflow.

The traditional library workflow for tangible resources such as monographs, serials, audio, and video materials is a systematic process of review and selection by subject bibliographers, order placement with a vendor and verification upon receipt by acquisitions, description and processing by catalogers, and proper shelving by circulation. This flow from one library unit to another works well for tangible resources and much of this work is accomplished through the use of paraprofessional library employees (Congleton, 2002). Professional librarians oversee the process, assign much of the routine work to paraprofessionals, and typically resolve problems or complete professional work such as the assignment of funds to budgets or the creation of original catalog records (Graves & Arthur, 2006). This workflow also may be managed entirely within a library’s integrated library system (ILS) for the purposes of order tracking, budget encumbrances and payments, catalog access, and inventory.

The ILS is ideal for this workflow management because it has been constructed with this workflow in mind. The ILS can alert a library when the receipt of a resource is overdue, display all of a library’s holdings accessible in the catalog, and inform the patron via the catalog of the availability of a particular resource through a status notice in the circulation system. With the exception of computer software, tangible library resources require very few extraordinary treatments for the purposes of acquisition, catalog access, and circulation.

Electronic resources, however, do not fit well within this traditional workflow. Resource selection, ordering, and payment may be easily managed within the traditional ILS workflow, but the similarity ends there. Once an order is placed, there is no mechanism in an ILS to notify a library of nonreceipt or the availability of a resource to the library user. There is nothing tangible for acquisitions to send to cataloging for the provision of access. The ILS cannot handle licensing issues or patron authentication, and many look to the electronic resource management system (ERMS) to fix the gaps in what the ILS can do (Allgood, 2006; Harvell, 2005).

While a library may provide a catalog record for an electronic resource, the nature of many of these resources such as abstract-and-indexing databases or full-text aggregators may be “lost” in the catalog for the purposes of patron use. Thus many libraries provide access to aggregators and indexing databases from their library’s Website, often from some kind of pathfinder or guide to electronic resources (Brown, Nelson, Wineburgh-Freed, 2005; Shorten, 2006), as well as providing additional full-text access points via openURL, creating yet another difference in the workflow.

The variety of resources encompassed in the idea of electronic resource management is also very different in nature from traditional resources. Libraries are faced with products that aide in resource access for patrons such as A-to-Z lists, openURL servers, and abstract-and-indexing databases, federated search engines, and resources that provide full-text content such as a publisher’s electronic-journal content, journal-content platforms such as Project MUSE® or JSTOR®, and content aggregators such as Ebsco’s Academic Search Premier. Yet there are other products not used by library users that also fall into the realm of electronic resources. These resources include analysis tools such as Gold Rush reports or OCLC’s collection analysis, ERMS, and proxy servers or other authentication tools.

With all of these choices, each with different benefits and unique issues, it becomes difficult for libraries to effectively plan the management of these resources. Libraries are faced with the challenges of strategically planning and managing their collections of electronic resources, providing cross-training or redundancy to cover temporary and permanent staff changes, and designing new
workflows for electronic resources, rather than adapting from print policies and procedures.

To get a sense of where libraries stand in electronic resource management, the authors conducted an informal survey (Bothmann & Holmberg, 2006) that was posted to the ERIL discussion list. Forty respondents completed the survey and another seventeen respondents provided partial responses. The survey consisted of 26 multiple-choice and open-ended questions. The questions posed in the survey asked electronic resource librarians to identify resources for which they have planned, developed procedures, and documented their workflow. Additionally, the survey requested comments on the challenges and the impacts related to planning, procedures, and documentation. Demographic questions included library size and type, electronic resources offered, total numbers of professionals and paraprofessionals, and numbers of professional and paraprofessional librarians involved with electronic resources.

The results of the survey revealed four common themes related to electronic resource management that libraries perceive as challenges. These themes include lack of adequate staffing levels, constant change in resources, budget issues, and communication with vendors, colleagues, and users. The survey responses present the many distinctions in management that are different from the workflow designed for print resources. Electronic resources come with demands that may also be barriers to some libraries. These demands include licensing issues and patron authentication, bibliographic control and access questions, and overall management for purchases, renewals, and license tracking.

Excluding electronic journal titles, many respondents indicated that they now provide access to a great number of electronic resources, typically between 50 and 250 separate resources. Regardless of size, most of these libraries employ only one to three professional librarians to manage electronic resources, often with little or no paraprofessional support. Thus these tasks fall to a few librarians to manage upwards of 50 different license agreements, vendors, renewals, statistics, verification of access, authentication, and catalog access, as well as any other aspects of work entailed by electronic resources.

**PLANNING**

Planning for electronic resources is perhaps the most important and least practiced activity in libraries. Electronic resources present a number of challenges to the traditional library operations and workflow that must be addressed in order to provide smooth management. The challenges faced by many libraries include operational issues such as the number of staff assigned to electronic resource management duties, staying in-step with technological and vendor changes in electronic resources, budgeting limited resources for the acquisition of resources, and communication with vendors and amongst librarians and administrators. Other challenges relate to access issues such as management tools like openURL knowledge bases, federated searching, catalog records, and authentication.

Staffing for electronic resources is perhaps the biggest challenge most libraries face. The results of the authors’ survey indicate that the majority of libraries, regardless of total staff size, typically have only one or two professional librarians involved in electronic resource management. Paraprofessional involvement varied widely with one-third having no paraprofessional involvement, a tenth having more than five, and the rest having one to three paraprofessionals involved in the workflow. In response to challenges related to planning for electronic resources, one librarian answered: “How can you plan if you don’t have enough people to do the work?”

Some libraries address the challenge of limited staffing by distributing work among existing staff, prioritizing projects according to staff availability, and emphasizing the need to invest more staff time.
Strategic Planning for Electronic Resource Management

in the electronic resource environment. Others have developed a team structure to meet the staffing need, delegating specific tasks to paraprofessionals. Another common technique is to create a committee of individuals to examine choices for a particular resource, narrow the choices and present a limited set of options from which the library may choose. However, once a resource is chosen, the investigation often continues as libraries research alternatives and new technological developments for a given resource.

Respondents indicated that the impacts of staffing issues center on training and time. One respondent said “when the organization of the workflow is not managed efficiently and completely, it is nearly impossible to teach others in how to manage it.” One library indicated that staffing levels prevent them from implementing many resources, thus limiting their choices only to those resources that come with vendor back-end management. Implementing new technologies, such as openURL, can be labor-intensive and take time away from other job responsibilities. Some libraries indicated time-management issues related to developing in-house management tools which then have little or no support once completed, and spending too much time on things that could be better addressed with “out-of-box software.”

Change was another planning challenge indicated by respondents. One librarian commented, “just about everything related to e-resources management changes too quickly to do any planning,” and another said they do not have time to plan; “instead we play catch-up all the time.” Many libraries use various tools to address the challenges of electronic resource changes. One method is to use a shared email system and a database of tasks to track and manage changes in resources. Other libraries only implement those services that can be supported by their small staff size or that have significant vendor support. Still others limit the number of vendors from whom they acquire electronic resources to help limit the number of changes.

Respondents indicated that the budget available for the acquisition of resources was another planning challenge. “Some planning (e.g., purchasing new tools/services) requires money that isn’t available;” is one comment that demonstrates this theme in survey responses. Other libraries noted that cancellation of some resources is the only way to acquire a new resource. Libraries address their budgetary issues by diverting funds from their print resource budgets or rearranging budget priorities when necessary. Cancellation of microform or print subscriptions duplicated by online content was one method of rearranging the budget. Another option is making use of consortial opportunities and discounts. Many libraries indicated constant requests to administration for more money.

The fourth major challenge cited by respondents was communication related to knowledge and understanding of electronic resources. Vendor communication is often frustrating because some try to work with librarians to improve their products and services and to create win-win situations, while other vendors are simply trying to earn a particular dollar amount. Publishers who are breaking into the electronic resource environment sometimes create communication problems as they lack an understanding of the access requirements libraries have (e.g., openURL, IP authentication). Couple these issues with an often-mistrustful attitude on both sides and communication becomes a big issue in electronic resource management.

Communication with administrators usually involves justifying the expense of resources, proving the need for resources, and obtaining budgetary support. Communication with users typically involves instruction on the use of resources and re-instruction as the resource interfaces constantly change. However, communication with other librarians tended to be the most problematic issue. Communication issues with fellow colleagues cited by electronic resources librarians were the acceptance of the need for particular resources,
Strategic Planning for Electronic Resource Management

a lack of realistic expectations of what one electronic resource librarian can do with the large number of resources and vendors, as well as of the technological capacities of electronic resources, agreement on resource needs, and assistance with the work from other staff.

Libraries address communication through various methods, such as asking questions on discussion lists, developing promotional materials for librarians to use for patron instruction, and sending continuous emails to library staff about projects and tasks related to electronic resources. With regard to vendor communication issues, some librarians and vendors can overcome the challenges. Librarians must simply keep working at communication until they find a style that works and until they can discern which vendors have problematic representatives and which have problematic organization cultures. Whenever possible, librarians should meet with the representatives and develop the communication and partnership. And, whenever possible, support those vendors who try to work with librarians and quit supporting those who do not. It is also worth ensuring that vendors meet with library administration, even if that meeting is brief. This can help with administration understanding any vendor representative problems as well as communicating the importance of the vendor’s product by the administration showing some interest.

The responses from libraries regarding planning for electronic resources demonstrate the reactive nature of electronic resource management, rather than work defined by any sort of plan. While it is not necessary and is probably impossible to create any kind of comprehensive plan, most libraries would benefit from developing a prioritized list of goals for electronic resources to guide their work. Creating a small electronic resources committee of key players in a library’s electronic resource management work is the first step in a good planning process. These key players should come from various divisions of the library, such as public services, cataloging, and systems, as well as a library’s electronic resources librarian, when such a role exists.

A first task of the committee should be to identify all of the staff involved in electronic resources workflow, from administrative support personnel to administrators (Mi & Sullenger, 2006). Often some of the work created from electronic resource management may be accomplished by a rigorous examination of staff workload and reassignment of duties to create a core group of individuals to focus on electronic resources within the existing organizational structure. Librarians should always make note of repetitive tasks that may be delegated to paraprofessionals and begin delegating that work. Another option is to evaluate and plan for a major reorganization of library units, which may or may not be feasible depending upon the current staff size and the organizational structure (Curtis, 2005, 98-99). Regardless of the path a library takes, the examination of specific tasks in relation to existing positions is a beneficial exercise for assessing the current situation and planning for the future.

For budgetary concerns, the committee may create a list of electronic resource types, such as A-to-Z lists, openURL, assessment tools, abstract-and-indexing databases, full-text databases, and so forth. The list may be used to identify and prioritize what a library has, what it needs but is lacking, and what it wants to have but is not essential for service to patrons. Inquiries and cost quotes are easy to obtain from vendors and may be added to the list to show the dollar amounts required to obtain a desired resource. Although such an exercise does not achieve acquisition of the desired resources, it provides an easy plan libraries can use if and when funding is available. A comprehensive assessment of the materials budget, particularly of serial subscriptions may provide a number of opportunities for targeted cancellations to free funds for desired resources.

Another important task for an electronic resources committee is to work on communication issues. Identifying specific people to interact with
vendors aides in communication and understanding for both libraries and vendors. Another important communication task is the development of a vision, definition of common goals related to a library’s mission, and the involvement of staff (J. White, 2005) in the process. Communicating changes and new developments in a variety of different ways, such as email, newsletters, staff meetings, and one-on-one interaction helps staff to feel like they are in the loop and a part of the process.

By creating an electronic resource committee, nonelectronic resource librarians can gain a greater understanding not only of the complexity of managing these resources, but also of the many ways others unintentionally sabotage the management of electronic resources. Often fear is at the root of these various biases: librarians refusing to attend training to avoid realizing how little they know; librarians complaining constantly about the problems with electronic resources and wearing on the morale of those managing them; or librarians working hard to limit the number of resources to either limit the number of interfaces they need to keep up with or to protect the much smaller print budgets. Having more librarians, such as those on an electronic resource committee, seeing these biases can possibly build more support and morale for those managing the resources. Furthermore, librarians may start to realize the difficult situation they have placed electronic resource librarians in: we never tell collection developers that they can only order books and other materials from only 10 publishers; we do not complain incessantly about how bad a particular book is; we do not ignore librarians when they are pointing out how helpful a particular reference book is for certain questions. By overcoming the different biases and fears, more librarians can participate in the management of electronic resources, will understand the various issues and the impact of these on the library’s services, and hopefully will strive to view electronic resources within the larger organizational planning process. For example, librarians across the board could start considering:

- How much time should a library invest in its Website for displaying its electronic resources, if it believes it will migrate to a next-gen OPAC
- Whether to add a next-gen OPAC or a federated search tool upon reaching a threshold for electronic resource interfaces (when librarians and patrons start complaining frequently, the library has probably reached the threshold)
- Which tool(s) are needed to improve services, access, and management; migration to these tools; and internal and external training, including instructing patrons at the desk, in drop-in sessions, via traditional instruction sessions, through online tutorials, and promotions of these new resources

**POLICIES**

The development and use of policies is critical in electronic resource management and for communicating a library’s goals. Policies set guidelines of practice that aid in electronic resource management (H. White, 2005). Aside from collection development policies, libraries need policies that address issues such as types of resources to support, licensing issues, and user access. Other policy topics include how and which resources should be cataloged, placed in a content management system or subject guide, or added to an ERMS.

Staffing and time are one of the challenges that libraries face with policy development. Libraries indicated that the lack of sufficient staff requires all of their time for managing electronic resources and does not allow any time for the consideration and development of policies. Change was also cited as a problem for policy development because vendors, products, and staff opinions are inconsistent and
Strategic Planning for Electronic Resource Management

change too often. Decisions are often made when there is not an ideal solution, which causes the need to remake a decision after seeing how things work out or when the technology evolves to meet a library’s needs. Communication is another barrier to policy development, particularly because of the time required to educate other librarians on the issues.

Respondents addressed policy challenges in differing ways. Less than half of the respondents have developed any particular policy, and most policies relate to electronic resource trials, inclusion of resources in the A-to-Z list, and the addition of resources with access restrictions. Some libraries create task forces to deal with policy development issues. Others send emails with justifications for decisions, or simply deal with issues as they arise rather than creating and following a specific policy.

The perceived impact of a lack of policies on electronic resource management was also varied. Some respondents see policy writing as cumbersome and time-consuming. Others felt that policies may be too restrictive or may make some management tasks more difficult. Still others feel that there is no way to create a universal policy or that their management practice is non-standard and therefore their policies would not be valid. Another impact of the lack of policy development indicated in survey responses was the pressure to keep up with peer institutions, which a policy might prohibit or even become meaningless if the administration does not buy into the policies.

While at times painful and time consuming, policy and procedure development are essential for electronic resource management. The time invested in the creation and writing of documentation will provide benefits now and in the future. A library that has a policy concerning the requirements of specific types of electronic resources can use that policy to eliminate investigation or consideration of vendor products that do not meet desired standards. For example, if your policy states that only those resources that are openURL compliant will be added to your collection, then time can be saved by not adding nonopenURL resources. Additional policies that libraries may want to consider writing include:

- Who can contact vendors under what circumstances?
- What sorts of troubleshooting should be done prior to contacting vendors?
- Should you go with the lowest cost vendor every year or should you try to stay with fewer vendors?
- What will you do about password-protected resources: not use them at all; use them by only via mediated access; use a scripted Webpage to display passwords (and if so, how often will you change those passwords); program your proxy access to input the passwords upon local authenticated access
- Will you provide access via OPAC and/or Website: all electronic resources only via Website or via both; just ebooks in the OPAC the others on the Website

While many would like to write a policy and consider it done, librarians must remember that what works now may not be feasible as more electronic resources are added to a collection. Thus, strategic planning, workflow, and policies remain intertwined.

Furthermore, communicating this decision to the vendor lets them know the specifics of what your library desires in a resource, and may influence their development of the product. Another reason to create policy and procedure documents is to assist with training and answering of questions. Brisson (1999) and H. White (2005) both note the benefits of documentation for these purposes, and describe methods libraries can use in the development of documentation. However, once documented, it is also important to maintain and update those documents. As Wisniewski (2006) observes, the largest benefit from an intranet for online documentation is the allowance of all par-
Participants to be authors. Some libraries have begun using this methodology for communication and documentation through Web logs and wikis for documenting and instructing technical services workflow (Traill & Huismann, 2004).

WORKFLOW

Related to planning and policy development, workflow and the documentation of the workflow is a crucial aspect of electronic resources management. Some of the librarians who responded to our survey indicated that they documented part or all of their electronic resource management workflow in order to determine what is not getting done. Others did so to create consistency, particularly in terms of requests from other librarians. Others found the documentation to be comforting to other employees, even if the workflow changed and made the documentation outdated. Some found documentation necessary to ensure each step is completed in a particular process, to better prepare for staff changes and leaves, or to begin a database trail. Still others believed documenting the workflow led to a better understanding of what is going on and improved communication of workflow tasks to others in the library.

While the reasons for documenting the workflow are numerous, several libraries perceived compelling reasons to not take on this task. Some believed the workflow is too cumbersome to document. Others work in libraries in which most electronic resource management is done on a case-by-case basis because there are too few common issues to make workflow documentation relevant. Some cited lack of time and personnel, while others indicated that the organizational culture precludes the documentation process (e.g., no one documents anything; cannot use the documentation in benchmarking; turf issues). Some also stated that the workflow is still undetermined and therefore cannot be documented.

Starting the workflow documentation process can be daunting because some sections can be problematic. For example, licensing is something that is done at all libraries, regardless of whether they accept all licenses as is or actually negotiate every one before signing. While most libraries have written or verbal priorities, few actually have lines drawn in the sand that will prohibit them from signing an agreement with a vendor. As such, writing the workflow for license negotiations can be difficult when it is far from an ideal situation and when it is beyond what most librarians thought they would be doing when getting their MLS degree. Furthermore, every vendor seems to have different requirements, both legal and technical, that make a documented workflow quite difficult to develop or follow. Conger (2004, pp. 127-132) stresses the importance of developing guidelines and provisions for licensing to assist electronic resource librarians with vendor negotiation. Documentation allows librarians the ability to reference specific needs and to verify specific aspects of a license when questions arise. Gregory’s (2006, pp. 79-101) chapter sections on licensing include a number of considerations and helpful questions for any library to development documentation on licensing.

Once the licenses are signed, other workflow issues present themselves. How do libraries communicate license information to their patrons, to their own staff in other units, to their administrators? Should they cut and paste the exact terms of the license into an ERMS or Web page, or should they interpret the terms and rewrite them in more understandable language? Should libraries only communicate to one group and not the others? What if the library does not have an ERMS—and how can information be tracked and updated easily? If a library does have an ERMS, how will the short-staffed area populate and maintain the ERMS? Will a library ever be able to retrospectively add in the terms from ongoing licenses that were negotiated five years ago? Should libraries start with those and work their way up to the licenses
negotiated this fiscal year? As these questions suggest, documenting aspects of workflow may involve a number of tough questions to answer; however, leaving these questions unanswered will only allow the confusion and lack of control many libraries have about electronic resource management to grow.

Control, or lack thereof, also influences the documentation of workflow. When parts of the workflow are outside the realm of electronic resources management, it is difficult to document that workflow. When other librarians and staff do not agree with the current workflow, documenting it can generate some heated discussions. The constant change through acquisitions and mergers in the vendor and publisher realm, new or changed license terms, new statistics metrics and/or accessibility, and the myriad other things that affect electronic resources management workflow daily all contribute to the feeling of not having any control.

Despite the difficulties and barriers to documenting workflow, libraries must do so if for no other reason than to help the new people that will inevitably manage the electronic resources. A library’s current state of electronic resource management chaos may dictate the starting point for documentation of workflow. For example, if a library is unsure of what is not getting done, start with an outline of the entire lifecycle of electronic resources, from pre-selection activities to renewal/cancellation (for assistance with this task, see the Digital Library Federation’s ERMI workflow in appendix B [Jewell, et al., 2004]). In the outline, also list who is currently doing each activity and note which areas are lacking assigned responsibility. Such an exercise may help with reassignment of responsibilities among library staff or possibly provide justification for increasing staff size. The outline will also point out tasks that are not currently being done, are not assigned and not attended to consistently, or even point out tasks that are superfluous. If on the other hand the electronic resources staff find that certain steps are forgotten, then documenting those particular procedures in the workflow will help bring more control and organization to that workflow, from which a library may create a checklist of activities that must be completed and further standardize the workload.

If a library can maintain an ERMS, the tool can be helpful with improving workflow. Currently, the different ones offer different features. Some libraries are choosing their OPAC vendor’s ERMS to help them manage the acquisitions module, payments, and so forth. Others are choosing an ERMS that is from another vendor to have access to other features or to have the ERMS interact better with their selected openURL and/or federated search tool. Eventually, librarians would like to see ERMS, federated search, ILS, openURL, and statistics all interacting seamlessly. For now, libraries must discern what their greatest needs are (workflow knowledge is helpful here) and then select the ERMS that will help cover those needs best. Some advantages to ERMS, if maintained, include:

- Multiple staff can access information about vendors and decisions: so, if a library has decided to cancel several databases for a more comprehensive one, that decision can be documented in the ERMS and save folks the challenge of remembering what they did and why or of searching through meeting minutes to find the explanations
- Vendor usernames and passwords can be stored in a central place
- Information about trials can be included

CONCLUSION

Many libraries currently have some variation of the electronic resources librarian as a professional position. The placement of this position within the organizational structure often varies. Some libraries place the position in public services,
others in technical services (Ginanni, 2006), and some centralize the work of electronic resources management, whereas others have the workload distributed throughout the organization (Fischer & Barton, 2005). Too many libraries appear to make little or any use of paraprofessional staff for routine electronic resource workflow tasks. And many libraries are caught between the print and the electronic worlds of information organization, with a primary focus on acquiring and holding print resources (McDonald, 2006). Their organizational and workflow structure is heavily influenced by the print workflow and little attention has been given to reforming that structure for electronic resources, as evidenced by the survey responses regarding planning, policies and workflow.

Planning, policy making, and documenting workflow and procedures are intertwined activities that are hallmarks of professionals. Ignoring them, waiting for the ideal situations to arise, and hoping for best practices to arise will not prevent the inevitable need for libraries to begin treating electronic resource management now before the perceived chaos of electronic resources takes over and inhibits user services and access. Libraries must regularly work towards creating policies, documenting their workflow, and planning in all areas of electronic resource management. Attending a workshop can upstart the process. Writing some outlines on the plane home, while everything is still fresh in the mind, can start wonders at libraries. Gathering some colleagues together with a particular task in mind or pounding something out during a slow hour on the reference desk or a really boring meeting can also get a new leaf turned over.

Managing electronic resources need not be the daunting, chaotic state that so many libraries described in their survey responses. As librarians, we have an affinity to structure and order that is clearly evident in our print resources workflow. What we have to remember is that this order did not just happen—our predecessors created that order. We as electronic resources librarians can also create that order and efficiency for the electronic resources era we now enjoy. We simply have to address one issue at a time, one policy at a time, one workflow task at a time, chip away at the chaos we perceive and if not order, then at least a clear path, with documented decisions and policies will develop out of this process and lead to better electronic resources management. Just remember to keep communicating with all interested and biased parties along each step. It will be the only way to discern our best practices as a profession in this new area of librarianship.

REFERENCES


