

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

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