

1-1-2011

Keeping Current with Electronic Resources and Libraries

Mary Moore PhD

University of Miami Miller School of Medicine, mmoore@med.miami.edu

Recommended Citation

Moore, Mary PhD. "Keeping Current with Electronic Resources and Libraries" (2011).

This Article is brought to you for free and open access by the Department of Health Informatics at Scholarly Repository. It has been accepted for inclusion in Faculty Research, Publications, and Presentations by an authorized administrator of Scholarly Repository. For more information, please contact repository.library@miami.edu.

eJOURNALS FORUM

Mary Moore and Suzetta Burrows, Column Editors

Keeping Current with Electronic Resources and Libraries

Mary Moore

University of Miami Miller School of Medicine, Miami, Florida, USA

ABSTRACT. Those seeking to understand current trends in serials and collection development often gather at established conferences such as the *Charleston Conference* and the *North American Serials Interest Group*. A relative newcomer, *Electronic Resources & Libraries*, brings together technical services personnel, public services personnel, Web developers, systems librarians, vendors, policy makers, and standards experts, forming lively communities of professionals working together to develop, deliver and evaluate eresources.

KEYWORDS. Electronic Resources & Libraries, eresources, electronic resource life cycle, Bonnie Tijerina, Oliver Pesch

Author. Mary Moore, PhD, (mmoore@med.miami.edu) is Executive Director, Louis Calder Memorial Library and Biomedical Communications, and Head, Department of Health Informatics, University of Miami, Miller School of Medicine, P.O. Box 016950 (R-950), Miami, FL 33101.

Acknowledgements: Many thanks to Bonnie Tijerina and Oliver Pesch for their assistance with the content of this column, and to Kimberly Loper and Peter Raposo who prepared graphics for publication.

Who is Bonnie Tijerina? In 2005 Bonnie was finishing a post-degree fellowship and starting a new job at Georgia Tech. Today she is one of the most accomplished opinion leaders on the topic of electronic resources in libraries, being named one of 2010's Movers & Shakers by Library Journal.¹ Bonnie recently finished a term as editor of the *Journal of Electronic Resources in Libraries*, creating a new focus for the journal and a new board, before leaving the position last year. However, Bonnie Tijerina is best known as the founder of the *Electronic Resources & Libraries (ER&L)* conference.

THE ORIGINS OF ELECTRONIC RESOURCES & LIBRARIES

Six years ago, when Bonnie was at an *Association of College and Research Libraries* conference session in Minneapolis, she decided to attend a session describing the roles and responsibilities of those having a relatively new role for librarians.² The survey, sent to individuals on the ERIL-L (electronic resources in libraries listserv) asked what job titles they had, what types of jobs they had, what kind of work they did, what skills were critical, and if they had the tools they needed to be successful. The results from 160 librarians showed that one-third (33%) of electronic resources librarians came from technical services; one-quarter (24%) came from public services; and the majority (43%) came from neither or both. Only three respondents said they had no public services

duties. They felt the major qualities needed to be successful in their positions were interpersonal communications, persistence, and contract negotiation skills. Respondents described their jobs as a combination of public service, acquisitions, technical services, marketing, training, vendor relations, and contract negotiations. They faced similar problems, with a need for better workflows, systems, and standards to deal with resources. In particular, respondents said they needed tools and support to license, acquire, assess, and maintain collections.

In Bonnie's mind, the concerns they cited seemed fixable, given a little collaboration. In looking back, Bonnie said she was thinking, "Well, if we could just get together and talk through some of these things, maybe we could resolve some of the common issues." The idea of organizing a meeting was too much for many of the attendees, who were busy tackling the transformation of libraries from primarily print to primarily electronic collections. But Bonnie had a month between when her fellowship ended and when her new job started, and so she sent out an email. She asked resources librarians to respond about what conferences they attended, how those conferences met their needs, and what needs, if any, were not met by other conferences. The response was enthusiastic, and of the 150 people who responded, 20 people volunteered to be leaders and organizers of a new resources conference.

An organizing phone conference call followed, and the first conference was held seven months later, in March 2006. The first *ER&L* meeting was held at the Georgia Institute of Technology's Global Learning and Conference Center in downtown Atlanta and was attended by 150 people. The most recent meeting was sold out, with almost 500 registrants.

WHAT MAKES ER&L DIFFERENT?

Bonnie's survey had asked people what conferences they already attended. Those with more of a technical services perspective talked about the *Charleston Conference*.

Originally devoted to book and journal acquisitions, the *Charleston Conference* brings together publishers, vendors and librarians on topics of scholarly information, including collection, preservation, pricing and archiving. *NASIG* (the *North American Serials Interest Group*), a well established conference focusing on serials and the broader topic of scholarly communications was also mentioned, but public services, Web and systems librarians working with eresources were less likely to attend these two conferences.

Some went to *Computer and Libraries* or the *Internet Librarian* for more of the public services interfaces aspects. No other conferences covered all aspects of the eresource life cycle, best described by Oliver Pesch of EBSCO Publishing (see Figure 1). This lifecycle includes assessing the need for an eresource; obtaining a trial; acquiring the resource by negotiating price and license terms; ordering the resource and paying for it; providing access to users; administering the subscription; providing user support and troubleshooting; and monitoring use and evaluating value.³ No other conference seemed to appeal to all individuals working to develop, deliver and assess eresources.

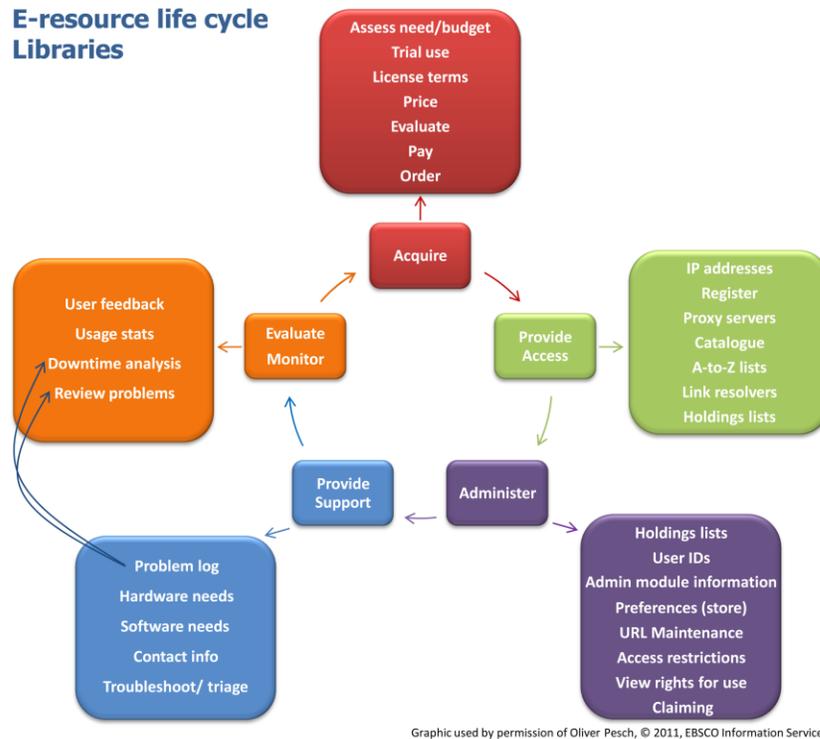


FIGURE 1. The eResource Life Cycle. Graphic used by permission of Oliver Pesch, © 2011, EBSCO Information Services.

ATTENDEES

The e-resource lifecycle includes a number of different stakeholders, and that is what makes *ER&L* so special. Although it is possible that each aspect in the lifecycle could be performed in isolation, strength comes when teams are formed that communicate back and forth. It is especially valuable when renewing a resource to know, not only how many times something was used and the cost per use, but also how often the resource was down, if clients report it is useful, and what peculiarities there have been in the license. For this reason, it is not uncommon to have teams of people from one institution attending *ER&L* together, or groups presenting on the rollout of new resources, each

individual with a different perspective. This was the original idea behind the conference – to bring together all the resources stakeholders for an interaction that was previously unknown. To realize that vision, from the beginning, *ER&L* was a conference that focused on reasonable registrations and efforts to make conference available to those who could not attend.

Most of the attendees at the 2011 conference are academic librarians, with the next largest category being librarians from state and federal government agencies. In 2011 there were at least a dozen medical librarians, primarily in technical services. The NIH Library was represented, as was BioMed Central, the New England Journal of Medicine, Springer, Elsevier and Science/AAAS. Together, this group would make a small but committed health sciences interest group.

VENUE

ER&L meetings were originally connected with Georgia Tech, where Bonnie was first working. This location had a university connection, and a large learning and conference center with an attached hotel. Later the conference was held at the University of California at Los Angeles, and most recently held at the University of Texas at Austin, where it will be hosted for at least one more year. These similar facilities – university conference centers with hotels attached – give the meetings a very different atmosphere from gatherings typically held at hotels or conference centers. It is easier to retain the sense of teamwork, community and connectedness in the university environment. This venue choice also keeps the conference smaller and more intimate. Most years the

conference cap is met and there is a waiting list. There is a real effort to keep the conference under 500 people to safeguard the collaborative nature and nimbleness of the organization.

COMMUNICATING THROUGH NETWORKING TECHNOLOGIES

Not surprisingly, one of the conference planners is designated the social network expert, reflecting a desire to share information even with those who cannot afford to attend the conference. Conference leaders make the most of electronic tools for communication and have experimented to learn the best possible means for online interactivity. *ER&L* has a LinkedIn group and has been on Facebook for a few years. The Twitter account provides the main source of up-to-date news. Links to all of these online networks are available at the ER&L website: <<http://www.electroniclibrarian.com/>>. In addition, information from the years it was hosted by Georgia Tech is posted in the institutional repository for Georgia Tech at <<http://smartech.gatech.edu/handle/1853/10062>> and these links will soon be posted to the ER&L homepage.

From the first meeting in 2006, USB drives with the PowerPoint slides for the conference have been distributed to attendees at the time of registration. It is common to see attendees viewing the PowerPoint slides and taking notes in the notes fields at the time of delivery. Some review the PowerPoint slides before the sessions to see which sessions would be the most beneficial to attend.

In a response to the demand for more content, ER&L is looking to offer more online opportunities, including continuing education in 2012. Sessions from 2011 were

videotaped with the intent to put recordings online and create online communities around various topics. This was originally attempted four years ago, when different open source platforms were tried. Now the group has written a request for proposals and talked with a few companies that hosts web conference and webcasting for a polished approach.

Presentations for the first conference are available at Georgia Tech's scholarly repository, SMARTECH (Scholarly Materials and Research at Tech): <http://smartech.gatech.edu/handle/1853/10063>. The first attempt to listen to the keynote speaker resulted in frustration when the file failed to download. The discussion group included comments from others about confusion over how to use the resources that were available, but this only illustrates a comment from Bonnie Tijerina – from the beginning of ER&L there was a sense of adventure and experimentation. Some early technology support efforts may have worked better than other attempts.

The next attempt opened a presentation from the National Institute of Standards and Technology (NIST). The presentation discussed the NIST Digital Content Team, established in 2005. This working group included the Web developer, a digital services librarian, the online catalog administrator, a cataloger with experience in metadata and a knowledge management librarian, and the speaker, Susan Makar, the digital services librarian. The NIST team seemed to reflect the types of individuals who might be interested in attending the ER&L conference together as a team.

Other conference presentations from 2005 to 2008 are included on this site, showing ER&L's evolution in conference delivery, distant communications and online archiving.

TRENDS IN CONFERENCE TOPICS

An examination of “hot topics” at *ER&L* over time is illuminating. Each year *ER&L* asks participants to contribute to the online conference Thought Cloud and this gives an opportunity to examine how interests have changed over time. The 2010 Thought Cloud appears in Figure 2.

ER&L Thought Cloud

What are you thinking about this year at ER&L?

access₄₂₆ antitrust₃₂₆ **archivalrights**₂₀₉ assessment₄₄₂ bonconf₄₀₆ breach₄₀₇ budgetcuts₄₃₇ businessresources₄₄₉ campusoutreach₄₀₁
cancellations₂₀₇ capitalbudgetingerm₄₀₀ cashcows₄₂₇ clockss₄₄₆ cloudcomputing₃₇₆ collaboration₃₄₆ collectiondevelopme₄₂₆
collectiondevelopmen₃₉₄ **communication**₃₄₃ consolidation₄₅₆ consortia₄₅₂ consotria₄₁₆ **copyright**₄₃₇ costperuse₄₆₇ **counter**₅₁₀
coverageload₃₇₉ data₄₄₈ **digitalcollections**₄₉₃ digitalliteracy₄₆₂ digitalrepositories₃₅₈ digitization₄₂₉ discovery₄₅₀ discoverylayer₄₅₇
drm₄₅₀ **ebooks**₃₀₆ ejournalvsdatabase₄₀₁ elecsubcounts₃₃₀ ennu₃₂₂ epubli₄₀₇ ereaders₄₂₉ erm₄₆₄ **erms**₃₈₂ etds₄₅₇ facultypartnerships₄₀₃
federatedsearch₃₇₃ funding₄₃₁ **googledigitization**₃₈₁ imagesoffacecarto₄₆₁ interdepartmentcomm₄₄ **ipad**₃₈₂ **iphone**₄₃₇ **isbns**₄₀₆ **ithaca**₅₀₀ **kbar**₃₆₈
libraryfuture₄₇₉ licenseterms₄₂₅ **licensing**₄₉₅ linkoutlocal₄₄₂ localresources₄₃₃ lockss₃₆₅ managingtransition₄₀₆ **marketing**₄₈₉
measurabledata₃₇₆ mergingworkflows₄₆₆ metadata₄₇₉ mobileapps₄₂₃ mobileinterfaces₄₃₇ **music**₄₉₂ **nationalelibrary**₃₈₄ negotiations₄₅₇ oclc₄₆₂ onix₄₇₀
openaccess₃₄ openaccessresource₄₄₉ **opensource**₅₁₇ openurl₄₄₁ **palmtrees**₄₉₄ partnerships₄₂₁ perpetualaccess₄₂₉ photography₄₇₅
pinheads₄₆₈ pointyheadedarsewipe₄₀₂ **portico**₃₇₃ postcancellation₄₀₁ printjournalfuture₄₃₂ projectmanagement₄₆₈ promotion₄₃₁ reenvisioning₄₁₁ scalability₄₃₇
screenreaders₄₁₂ seru₄₆₉ **shibboleth**₃₈₄ spam₄₄₉ spamtest₄₄₃ spamtest2₄₁₄ spamtest3₄₄₀ stakeholders₄₁₇ **standards**₉₀₂ statistics₄₄₀ stories₄₃₉
streamingvideo₃₈₇ sush₄₄₅ **thebigpicture**₃₂₅ thoughtcloudsrilly₄₀₄ tippingpoint₄₁₆ training₄₃₂ troubleshooting₄₇₆ unbundlingjournals₄₂₄ unbundlingpackages₄₂₄
unifiedindex₄₃₄ usability₄₃₆ usage₄₃₃ **usagestatistics**₃₆₉ useraddedcontent₃₉₂ userbehavior₄₆₈ userneeds₄₃₂ **usertraining**₃₈₇ usingproxies₄₂₂
valuablereports₄₀₇ webscale₄₂₁ wiley₄₅₂ **workflow**₉₀₃ worldcatlocal₄₄₆ zotero₄₁₂

FIGURE 2. 2010 ER&L THOUGHT CLOUD. Used by permission, Bonnie Tijerina, ER&L, LLC.

One example is the topic of eresource management systems (ERMs). More than six years ago academic librarians realized that they needed tools similar to integrated library systems that would assist in management of the complicated aspects around eresources, including licensing and usage restrictions. There are many tools available to

support the management of eresources. Examples include *Electronic Resource Management* (or ERM) from *Innovative Interfaces Millenium*, *Serials Solutions Resource Manager*, *Verde* from *Ex Libris*, and *Coral*, an open source ERM from the Hesburgh Libraries at Notre Dame.⁴ Discussions on obtaining eresource management systems seemed to peak in 2009, when there were many presentations and discussions on obtaining eresource management systems and tools, and making them operational once obtained. Although there were still sessions on this topic, including a preconference workshop, one of the 2011 sessions was entitled, “Is the Bloom Off the ERM Rose? Rethinking and Retooling Our Electronic Resource Management Strategies.”

Standards for electronic resource management have been among the important topics. NISO and *ER&L* have partnered to explore the topic of standards for electronic resources. Every year a representative of NISO has attended the meeting where there are a number of standards sessions. Librarians have been helpful in identifying issues, as NISO has been helpful in determining how the systems can talk together.

Workflow management and troubleshooting has continued a hot topic. In one 2011 session the speaker and the audience discussed different options for testing remote access, such as using a Web browsing anonimizer, *Vidalia*, *TOR* or *BrowserCam*.

Because many libraries are facing budget reductions, another hot topic continues to be the evaluation of eresources in terms of return on investment. This aspect includes assessment for addition to the collection, obtaining usage statistics, things like *SUSHI* <<http://www.niso.org/workrooms/sushi>>, gathering user feedback, and other assessment approaches. At the 2011 conference, Chan Li from the California Digital Library presented a particularly relevant session, “Metrics-Based Journal Value Analysis.” This

approach, called the Weighted Value Metric, was developed to provide University of California librarians with key information to guide them during the journal review process.

The 2011 conference included a good amount about discovery tools that overlie the many silos where records are cataloged or indexed materials are held. Discovery tools are a little like Google, with content that has been preindexed, so the results come up more quickly than federated search engines. Where federated search engines go out to each resource to search it at the time the search terms are entered, new discovery tools have already indexed that information. The results are displayed more quickly and the interfaces are more attractive and usable. Some companies with these tools include *ProQuest*, *Ex Libris* and *EBSCO*. Athena Hoepfner of the University of Central Florida presented a useful session, entitled “Discovering Choices: The Web Scale Discovery Marketplace.” This study was begun to compare various vendors’ functionality, licensing and pricing models, and to make a purchasing decision among discovery tools, however the effort was complicated because common language among vendors did not exist and characteristics and features of each choice were not obvious.

Academic librarians continue to show interest in an expanding role in copyright and legal support on campus, scholarly communications, institutional repositories, finding appropriate places to publish for friendly access.

RELEVANCE TO HEALTH SCIENCES LIBRARIANS

Most medical librarians would agree that the topics above are relevant to their work with resources, but there are some differences between issues being tackled by academic libraries and the culture of medical libraries. Long ago medical librarians saw that the tide of use was shifting first toward research journals versus monograph use, and then toward electronic versus print use. Due to budget issues in the early 90s, there were medical libraries that had stopped buying any but the most essential books in favor of journals. Likewise, more than five years ago, it became more common to hear opinion leaders in health sciences libraries state that they were moving toward all-electronic collections because these showed greater usage and were accessible all times of day, as well as in remote locations. This round-the-clock accessibility is crucial for health care providers. It is interesting to learn how this trend relates to academic libraries. At the 2011 conference, there were comments from the audience that 30-35% or more of their journal collections were still in print, although the electronic proportion was increasing. Also interesting was a discussion of whether students want mobile computing academic library resources. This conversation took place many years ago in medical libraries, when librarians began supporting resources available on personal digital assistants, or PDAs. At the *ER&L* conference, the acronym PDA was only used to refer to “patron driven acquisition” of ebooks.

Open access and alternative publishing models for electronic resources continues to be a hot topic for many health sciences librarians, especially with declining library budgets. Although open access per se has not been a major topic at *ER&L*, according to the conference organizer, there are always sessions on the topic and on making access and content more available. A few academic librarians expressed interested in the impact

of the NIH public access policy. As mentioned, a BioMed Central representative was present, as were many other health sciences resource vendors.

WHAT IS NEXT FOR ER&L?

To find information on how attendees perceive ER&L, several perspectives on a past meeting were presented in an article in the *Journal of Electronic Resources Librarianship*.⁵ Reviewers included individuals with public services duties, those with technical services duties, a paraprofessional, an individual changing jobs after a long career, and a new librarian, only six months in her position, Aperna Sherman. Sherman was able to sum up the goal of the conference very concisely:

Libraries need to talk to each other to find out what we are doing and what we would like to be able to do. Libraries should talk to vendors and publishers and tell them what we (as whole) want. Vendors and publishers should talk to each other and create across the board standards.

The next conference for ER&L will take place on April 2-4, 2012. The location will again, and perhaps for the final time, be held in Austin, Texas. Conference planners will be capping attendance at 500 or fewer. Early registrants have the added advantage of staying in the conference center near the heart of the University of Texas at Austin, and within walking distance of the Harry Ransom Center, the Nettie Lee Benson Latin

American Collection, and the LBJ Library and Museum <<http://www.utexas.edu/about-ut/arts-attractions>>.

Bonnie Tijerina is open to creating space for the needs of the ER&L community at the conference and online. She has offered to host a health sciences interest group at the 2012 conference if there is interest. For more information on this or on ER&L, contact her at: bonnie.tijerina@gmail.com.

REFERENCES

1. Fialkoff, F. "LJ Movers & Shakers – They Move Us Forward." *Library Journal*, 135, no. 5 (March 15, 2010). Available: <<http://www.libraryjournal.com/csp/cms/sites/LJ/LJInPrint/MoversAndShakers/profiles2010/moversandshakerstijerina.csp>> . Accessed: May 23, 2011.
2. Homberg, M. and Bergman, B. "Adventures-R-Us: Shooting the Rapids and Emerging as Electronic Resource Librarians." Association of College and Resource Libraries Conference, Minneapolis, April 2005. Described in: <<http://www.ala.org/ala/mgrps/divs/acrl/publications/crlnews/2005/jun/ntlconfrpts.cfm>>. Accessed: May 23, 2011.
3. Pesch, O., "Library Standards and E-Resource Management: A Survey of Current Initiatives and Standards Efforts." *Serials Librarian* 55, no. 3 (2008): 481-486.
4. "CORAL – Open source ERM Software from University of Notre Dame Hesburgh Libraries." 2010. Available: <<http://erm.librqary.nd.edu/about.html>>. Accessed May 12, 2011.

5. Tijerina, B. "Reviewing the Electronic Resources & Library Conference." *Journal of Electronic Resources Librarianship*, 20 (2008):183-204.