

## Teaching Electronic Resource Management

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## **TEACHING ELECTRONIC RESOURCE MANAGEMENT**

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### **ABSTRACT**

Electronic Resource Management (ERM) is a specialization that impacts and is impacted by the work of librarians in public services, technical services and systems. All Library and Information Science (LIS) students that wish to work in libraries should have exposure to the concepts and practices of ERM. While LIS programs often convey this knowledge in bits and pieces through existing courses, I believe it is essential to pull this knowledge together into a single course, integrating the various components and providing an overarching perspective on the ERM environment. This presentation conveyed my experience developing an ERM course for the fall semester of 2009. I discussed the combinations of theory, concepts and practice that framed the course and I shared challenges that I encountered.

### **ERM IN PRACTICE AND LIS EDUCATION**

In 2003, Fisher published an article that posited “the position title of Electronic Resources Librarian has been pre-empted by the public service sector of the profession” (p. 3). It was thought by many at the time that the functions of managing electronic resources would be integrated into the work of existing personnel. As challenges providing technical access to electronic resources arose, systems personnel became involved. As electronic resources proliferated and interfaces evolved, evaluation and selection responsibilities were given to reference and collection development staff. And as licensing terms and pricing schemes became more complex, acquisitions librarians often handled vendor relations and negotiations.

ERM management tools have been introduced over the past decade and overall change in the area has slowed, giving libraries to opportunity to more efficiently adapt their organizational structures and workflows to the new environment. Libraries today often have a librarian or team of librarians directly responsible for ERM. Whereas reference and instruction positions may have once included ERM responsibilities, today, ERM positions may include some reference or instruction responsibilities. These inclusions have been declining however. In her study of ERM job announcements from 2000 to 2008, Murdock (2010) noted that “some responsibilities that were considered extraneous to e-resource specific tasks, such as reference service and cataloging, did show an overall declining trend”(p.39).

Regardless of the type of library or area of librarianship in which a student may eventually work, she will likely engage in some way with the provision of electronic resources. While new librarians will have the opportunity to learn the specifics of their part in the ERM workflow while on the job, understanding how the work do impacts the work of their colleagues is essential for effective ERM. All students preparing for librarianship would benefit from understanding the big picture of ERM; LIS programs should offer a course dedicated to the subject.

Many LIS programs cover this information in bits and pieces through a wide variety of courses, ranging from information organization to reference sources and services. Rarely do students gain knowledge about how the integration of those bits and pieces occurs in practice. This

mirrors the evolution of practice, where early on, elements of ERM were added on to the responsibilities of current personnel. However, today, there is recognition of an integrated practice of ERM. LIS education should follow this lead by producing courses that present an integrated view of ERM. I developed such a course, which was offered in the fall semester of 2009.

### ONE APPROACH TO TEACHING ERM

Developing a new course that meaningfully addresses the emergent role of the ERM librarian required the introduction of new theory and concepts, as well as an explanation of their relationships in current practice. Higher-level courses in LIS tend to build on the theoretical and conceptual areas taught in the lower-level foundation courses. Foundation courses in my program focus on theory and concepts in such areas as library history, professional ethics, information seeking, societal dimensions of information, information organization, information retrieval, assessment, and management. These are all essential elements of library education and have well prepared students for a wide array of practical courses. However, I didn't feel they were sufficient to fully prepare students for a course in ERM.

I found it useful to introduce (or review) additional theory and concepts. Theory areas included systems and networks, communities of practice, organization theory, stakeholder theory, game theory, as well as basic microeconomic and macroeconomic theory. Conceptual areas included the evolution of scholarly communication and the publishing industry, the emergence of open source and open access, contract law, the development of information standards, and project management. These areas augment the foundational theory and concepts in our LIS curricula and would be useful to students whether they go on to play a central role in ERM in their organizations or not. The following chart outlines how I aligned theory, concepts and practice in an eight-unit course.

**Table 1. Unit Elements for an ERM Course**

<b>Unit</b>	<b>Theory</b>	<b>Concepts</b>	<b>Practice</b>
Evolution of Electronic Resource Management	Communities of practice and organization theory	Standards development in the ERM community	Reviewing and engaging with ERM social networking venues
Scholarly Communication	Stakeholder theory and macroeconomic theory	Scholarly communication, scholarly publishing, and serials in libraries	Conducting a stakeholder analysis for the development of an institutional repository

Electronic Resource Management Work Flow	Systems theory and organization theory	DLF ERMI and the development of ERMS	Coordinating administrative data with and without ERMs; work flow analysis
Access, Authentication, and Administrative Interfaces	Systems theory and networking theory	Proxy servers; web site design and management	Managing and branding subscriptions through administrative interfaces
Listing, Linking, and Reporting	Systems theory and networking theory	XML, A to Z lists, and openURL	Defining institutional holdings and running reports in a knowledge base; resolving links
Vendor Relations, Negotiation, and Licensing	Stakeholder theory and game theory	Information marketplace, contract law	Reviewing, negotiating, and amending licenses
Evaluation, Selection, Deselection, and Preservation	Microeconomic theory	COUNTER and SUSHI, digital preservation options	Managing use statistics, conducting cost-benefit analyses, and planning selection and deselection
Managing Change in the Information Environment	Organization theory	Project management and case studies from the LIS literature	Planning for change using project management and pitching solutions

## INTEGRATING TECHNOLOGIES INTO AN ERM COURSE

The table above coordinates practical activities with unit topics. These activities applied techniques and technologies that would be useful in the library setting. I believe that removing the mystery of unknown technologies is one of the most important confidence builders that we can provide for our students. Unfortunately, vendors tend only to provide educational access to the front end of their database products. I was successful in securing administrative access to one product which was sufficient for helping students understand that particular component of ERM. While most proprietary products used for managing ERM weren't readily available to educators and students, open source products were available to provide students with hands-on experience with the back end of the systems.

CUFTS reSearcher is a suite of tools that has been successfully implemented in libraries to manage serials and facilitate access to electronic resources. These tools are open source and offered through a Creative Commons Attribution-NonCommercial-Share Alike License by Simon Fraser University Library. At its center is the knowledgebase, which supports the production of A-Z lists, link resolving, reporting, and serials management. MARC records are also available for populating the catalog. While CUFTS reSearcher isn't used widely in the United States, I felt that it may provide students with the basic tools they would need to understand the technologies that fuel effective ERM. However, I found I did not have the time to implement the system and design relevant activities before the class was to begin. Simon Fraser University Library does offer a hosting option, which might be built into future budgets.

While securing access to the relevant technologies was a challenge, the students were exposed to demonstrations of these technologies by practitioners who generously gave their time to help the students better understand the technical environment of ERM. Ideally, however, students should have access to and the ability to manipulate the software as ERM librarians do in practice. It would be to the benefit of vendors to offer LIS programs complimentary access to their products. Recognizing that exposing students to their products builds brand recognition and perhaps brand loyalty, many information providers currently offer free access to their databases. However, these outreach services to LLIS educators and students do not extend to offering complimentary instances of knowledge bases and their related products. Perhaps there has not yet been sufficient demand; but, as more ERM courses are developed and delivered, demand will rise.

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