Electronic Resources Challenges

- They snuck up on us
- They got outside our normal channels
- There are many pieces, handled by many people, in many departments
- They were new and different – outside our knowledge base and comfort zone
- The scope grew quickly, while personnel support did not

Recommendations

- Capture and identify all your electronic resources
- Talk about staffing
- Determine all the steps that need to happen to manage the resources from beginning to end
- Create a workflow or multiple workflows that make sense for you, and that prevent things from falling through the cracks
- Control your vendors, insofar as that is possible
- Budgeting
- Identify remaining problem areas
- Consider maintenance
- Make a plan!
Capture and Identify

- Many third-party products are a bit too much for public library needs
- Open source options
  - CUFTS, CORAL, ERMES, Ematrix
- Use what you have
- Make sure information is available to those who need it

What data to capture?

- Resource name and provider
- Who pays for it and when
- Sales rep and contact information
- Support information and help desk contact information
- URL and whether proxy is needed
- Statistics and usage information
- Date at which different steps happened
- Pilot information
- Why a resource was selected or not selected
Talk about staffing

- Who needs to be involved?
- What responsibilities will they have?
- What information will they need?
- What information will they need to share?
- How will things need to change?

Determine all the steps

- There are a LOT of steps to electronic resources
  - Piloting
  - Selection
  - License or subscription agreement
  - Ordering
  - Providing access
  - Adding to catalog and database list
  - Notify other related vendors
  - Dealing with problems
  - Renewal
  - Cancellation or weeding

Create a workflow

- Possibly the most important step
- Follow the process from start to finish
- Assign responsibilities
- Determine how the process will move forward from each step – consider shared checklists
- Consider having one person with overall responsibility for making sure the whole process happens
- Make as many workflow/checklists as necessary
Control Your Vendors

- Funnel all vendor contacts through one person
- Whenever possible, simplify the number of accounts you hold, but have as many accounts as necessary to make things work properly
- Funnel all selection and purchasing through the approved workflows
- Know what you want – and tell them

Budgeting

- Need to have an electronic resources plan
- Think about what’s got to give
- Look for innovative ways to manage pricing
- Budget may need to precede demand in some instances
- Make sure to consider all related costs – hosting fees, subscriptions, minimum orders, catalog records, etc.
- Use tools at hand to make good decisions

Cataloging

- Should you put records in your catalog?
- Where will you get the records? What problems have others had? What are the options?
- How much will they cost?
- How much will you modify them?
- What about quality control?
- Who will handle it?
Identify Remaining Problems

- What is left to do?
- Who is responsible for making it happen?
- What is the priority and/or timeline?

Maintenance

- How will you make sure things get done?
  - This time around
  - Next year...
- What tasks need to be assigned?
  - Renewals
  - Weeding
  - Quality control and error detection/reporting/follow up
- How will they be tracked?

Make a Plan!

- Get a handle on what you have and then make a plan for the future
- Know what’s available and what’s coming – keep up with vendors and products – both materials and management products
- Use your usage statistics to make purchasing decisions – and any other tools you have!
- Plan the money – and determine the impact on other budget items – make sure the choices are deliberate
- Think and talk about staffing
- Re-evaluate at least annually – make sure you have a handle on the whole e.r. picture
Questions?

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Thank you!