On the circuit

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Report on the symposium 'Managing electronic resources: meeting the challenge'

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Joyce Grenfell, a British actor and writer, once stated that "progress everywhere today does seem to come so very heavily disguised as Chaos."[1] In librarianship, nowhere has this seemed truer than in the management of electronic resources. Electronic resources collections bring with them challenges that no traditional library management system has the capability to handle. As a result, librarians have been forced to rely on their own creativity and skills to develop local solutions.

These local solutions were recently showcased in a symposium entitled 'Managing electronic resources: meeting the challenge.' On 24 January, 150 librarians, publishers, vendors and other industry professionals spent a day at ALA Midwinter in Philadelphia sharing their experiences with e-resource management. Sponsored by the ALCTS Serials Section and supported by contributions from Swets Blackwell, and Springer Verlag, New York, the symposium sought to provide practical information and advice to librarians faced with increasingly unmanageable digital collections.

Four months into my new job as an electronic resources librarian, I went to the symposium with the hope that, even though most of the speakers came from major academic libraries, I would hear something that would help me cope at my relatively small special library with licenses, aggregators, payments, technical management, usage statistics and selection, to name just a few of the issues I face on a daily basis. I was not disappointed. In addition to providing general overviews of a variety of complicated topics, all speakers identified solutions, often home-grown ones, to the myriad challenges facing anyone who works with electronic resources. By the end of the day, I had a head full of practical information and a notebook full of ideas to implement at my institution.

The first two presentations grappled with the idea of what managing an electronic resource collection actually entails. Dan Greenstein, who has served as the University Librarian and Executive Director of the California Digital Library since May 2002, started the discussion with a look at the complications of managing a collection shared by multiple campuses in 'Managing electronic resources: co-operative strategies for meeting the challenge.' In 1997, the University of California developed the California Digital Library to help control the costs of acquiring and managing an electronic collection. Over the past six years, the shared management has allowed the university to gain leverage in the market and significant cost savings, bringing benefits to its 11 campus members. The consolidation of licensing and acquisition has also decreased the resources member libraries must allocate to those tasks, making the acquisition of e-resources more efficient. Nevertheless, these benefits are undercut by the costs associated with co-operative decision-making the members must incur. Greenstein spoke in particular about the difficulties of co-ordinating print and digital selection decisions across multiple campuses.

Beth Warner, the Director of Digital Library Initiatives at the University of Kansas, then moved

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1. *Quoted in* The Columbia World of Quotation, 1996, New York, Columbia University Press.
http://www.bartleby.com/66/ [9 June, 2003]. ATTRIBUTION: Joyce Grenfell (1910-1979), British actor, writer. 'English Lit.' Stately as a Galleon (1978).

the focus to the tool that librarians have traditionally used to manage library resources – the integrated library management system (ILMS) – in a presentation entitled 'Managing electronic resources in today's ILMS environment.' Until recently, librarians could rely on the ILMS to serve all of their needs in the areas of acquisitions, bibliographic control, holdings, circulation, access and statistics. With electronic resources, this is no longer true. The traditional ILMS cannot handle the functions of electronic resource management and access, such as tracking and managing licenses, payments, remote users, usage statistics and URLs, all of which occur in a volatile environment. Warner does not believe, however, that the answer is to somehow incorporate e-resource functions into the ILMS. Instead, Warner asserts that a library must make its ILMS interoperable, open and integrated so that it will work with external systems and services in what she calls a "resource management environment" capable of adapting to new types of resources and functions.

The external systems and services needed to manage electronic resources provided the focus for most of the following presentations. October Ivins, an information industry consultant from Boston, Massachusetts, began the next segment of the symposium with a focus on e-journal management systems in 'There has to be an easier way: stand alone e-journal management services.' E-journal management systems, as described by Ivins, are services that provide and maintain a "customized list of the client library's current full text e-journals," which the library can use to create a web page or a portal for e-journal access. Although e-journal management services are certainly often an improvement over a library's self-created pages of links to e-journals, Ivins elaborated that the services are not without their costs. The library must continue to allocate resources, including a portion of their budget and personnel, to set up the service and maintain it, to perform updates and to communicate with the vendor.

E-journal management services, however, take care of only a small portion of the e-resource management functions. In the absence of any products addressing e-resource management as a whole, many libraries have begun to design and build local systems to manage licensing, acquisition and support. In 'If there's a fork in the road, take it! (Can we develop standards for e-

resource management systems while we're busy building them?),' Tim Jewell, Head of Collection Management Services at the University of Washington, examined the features of several major e-resource management systems – VERA (MIT), ERLIC (Penn State), HERMES (JHU), ERdb (UCLA), and Gold Rush (Colorado Alliance) – developed by libraries around the country. These customized systems cover a wide range of content and features, including resource description and listing, licensing terms, access details and contacts, renewal date alerting and problem tracking. Jewell has been especially active in the development of standardizing functions, element names and definitions for these systems. To that end, he provided an overview of the Digital Library Foundation E-resources Management Initiative (for more information, see http://www.library.cornell.edu/cts/elicensestudy/home.html) and his work to establish standards.

Dan Tonkery, Vice President, Director of Business Development, EBSCO Subscription Services, next pointed out that the answer to some management difficulties may lie in the expansion of the role of the traditional subscription agent. In 'Aggravation, Agitation, and Aggregation – the three A's of e-resources management: using the subscription agent's solution for improved control and management,' Tonkery argued that sub-scription agents already meet many of the demands for the set up, renewal and maintenance of most e-journals. These services could be expanded to provide more comprehensive e-resource management. Although the services would be provided at a charge, Tonkery pointed out that libraries already pay a cost for managing their e-resources regardless of who does the management.

After lunch, the next two presentations addressed tools that aid particular aspects of e-resource management: resource linking and usage measurement. Jim Mouw, the Acquisitions Librarian and Electronic Resources Officer at the University of Chicago, in 'Resource linking,' provided an overview of linking services with a focus on the University of Chicago's experience with SFX, a linking service from Ex Libris. Linking services allow patrons to move to the full text of an article without having to go through an intermediary step, such as searching in a catalog, by providing direct links from an index to an

article or other service. Usage of SFX at Chicago has grown rapidly since 2001, but the system does have some downsides. Substantial personnel time must be devoted to the maintenance of SFX, and publishers are not used to thinking about SFX when they are making their decisions. This often translates into an inconsistent approach to linking from product to product.

Having spent a portion of their budget on e-resources, libraries would, of course, like to track their usage. Unfortunately, it has thus far proven impossible to get consistent and reliable usage statistics from vendors. In 'Traces in the click-stream: coping with the imperfections of measuring electronic use,' Joseph Zucca, Assessment, Planning and Publications Librarian at the University of Pennsylvania, addressed the hurdles to measurement of electronic usage and described the University of Pennsylvania's efforts to develop its own system to get accurate measurements. The University of Pennsylvania has built a measuring device into its local architecture, which provides a known and repeatable counting methodology and consistent counts across resources. Despite some short-comings, including the inability to count bookmark users and to count use within aggregations or collections, the system provides accurate measurements with tight correlations between logins and article views.

As the last presenter of the day, Trisha Davis, Associate Professor and Head, Serials and Electronic Resources, Ohio State University, in 'An uneasy balance: walking the tightrope of change while managing e-resource chaos below?,' asked participants to consider some of the major challenges that librarians will face and described "partial solutions" to those challenges. OhioLINK, with its statewide library catalog with a variety of links to e-resources, provides a partial solution to Davis' first identified challenge: the growth of portals that lack links to catalogs and databases. The second challenge is the lack of standards for course management systems for distance education. The TEACH Act, which provides some guidance for the use of digital items in the classroom, may help out here. Likewise, MIT's DSpace Model, a service that captures and preserves digital content from researchers, is a solution to the third challenge of archiving digital content that has never been published. A final challenge lies in the current digital rights management systems which Davis aptly describes as "restriction enforcement systems." A partial solution is SHIBBOLETH, an inter-institutional resource sharing mechanism.

As I left the symposium, I could not help but think that perhaps the challenges posed by electronic resources are not such a negative thing. Septima Clark, an African-American civil rights activist, once said, "I have great belief in the fact that whenever there is chaos, it creates wonderful thinking."[2] Out of the chaos of e-resources management have emerged a number of exciting innovations. I am looking forward to attending the symposium again next year. ALCTS plans to present 'Taming the electronic tiger: effective management of e-resources' in San Diego on 9 January, 2004. Details will be available soon on the ALCTS website at http://www.ala.org/alcts.

2. Quoted in The Columbia World of Quotation*, 1996, New York, Columbia University Press.*
http://www.bartleby.com/66/ [9 June, 2003]. ATTRIBUTION: Septima Clark (1898-1987), African American civil rights activist. As quoted in I Dream a World, *by Brian Lanker (1989)*