The management and development of e-resources at LSE

The Library at LSE provides access to a wide range of electronic resources: e-journals, databases, e-books and datasets. Managing these resources is challenging, and procedures and practices are being set up and improved. Working groups comprising expert staff have been set up to enable discussion and decision-making for all aspects of e-resource management. New systems being implemented include an electronic resource manage-ment system and an institutional repository. Areas that are being developed are those of usage statistics, resource evaluation, policies and procedures and the use of e-books.

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Managing the library that serves the internation-ally respected teaching and research power-house that is the LSE is a challenge. The print collections are continuing to grow, maintaining the Library's function as the premier social sciences collection in the UK but the complementary electronic collec-tions have been growing more rapidly. When dealing with collections such as these, the problems of managing those virtual collections grow equally quickly.

Responsibility for e-resources has until recently been distributed across different sections of the Library. However, in 2004 the Library created the new post of E-services Librarian, whose role is to provide a strategic direction for the management, development and discovery of e-resources. The E-services Librarian, although having some admin-istrative responsibility, is expected to provide an overview of e-resources and act as a hub to draw together the diverse strands of staff expertise.

The three primary aspects of e-resources manage-ment at LSE are collections, staff responsibilities and systems. Although they can be considered separately, in reality they are inextricably inter-dependent.

E-resources collections

For budgetary and management purposes, the e-resources are divided into:

- e-journals: managed by the serials team
- e-sources: (defined at LSE as abstracting and indexing databases, e-book reference collections and anything that does not fall into the other categories); managed by the E-services Lib-rarian
- datasets: managed by the Data Librarian
- e-books: any taught course materials (i.e. reading list items) will be the responsibility of the Teaching Support Services Librarian. Refer-ence collections are integrated with e-sources.

LSE Library subscribes to extensive collections of e-journals (approximately 15,000 titles), databases (around 80 titles) and datasets (18 subscription items). The Library currently has subscriptions to about six e-book services. The taught course e-book collection is not yet being developed.

There are a number of criteria for selection and relegation of e-resources and these include:

- support for teaching and/or research
- cost
- access permissions.

The Library has a policy of making as many resources as possible available off-campus and also internally available to visitors to the Library building, as well as arranging access for unlimited numbers of users wherever possible. This requires close scrutiny of licences and careful access management.

Although these criteria exist and the collection development policies for each academic depart-ment include a section on e-resources, agreement of detailed and forward-looking e-resource collection policies is overdue. Work is due to take place on such policies during this year.

Usage statistics help to inform renewal and relegation decisions. The E-journals Co-ordinator, based in the serials team, gathers and collates usage statistics for journals and has written accompanying guidelines. The figures are basic, as only numbers of downloads are collected (where possible). Procedures for gathering, collating and recording figures for e-sources and e-books are underway. Finding sources for these figures has proved an arduous task. During 2005/06, e-source and e-book statistics collection and collation will include multiple measures and evaluation criteria. The plans and reasoning are being developed, but the Library does not expect rapid progress in this area, although scrutiny of any available statistics already informs renewal decisions.

LSE Library has a discrete print collection which comprises reading lists for taught courses and is known as the course collection. This collection is under extreme pressure both in terms of physical space (despite being housed in a relatively newly refurbished building) and usage. E-books are seen as a future means of resolving these problems and therefore the Library is monitoring e-book developments closely. The main problems which are proving so difficult to solve are those of finding relevant titles with LSE-preferred access methods. Until the e-books available satisfy these two criteria, the Library will continue to struggle to manage its print course collection.

Staff responsibilities

Decisions and discussions about e-resources in the LSE Library take place through consultation among its extensive and experienced staff. A number of groups, drawing on expertise from different Library departments, meet regularly.

Now that it has been running for about four years, the Serials Review Group (SRG) has developed an efficient and successful method of carrying out its remit. The group is responsible for decisions regarding journal (both electronic and print) subscriptions, renewal and relegation. It meets bi-monthly and each meeting includes consideration of new titles that have been suggested for subscription (there are usually sample copies of each made available) and a review of titles or packages that have been flagged up as likely cancellations or renewals. A spreadsheet of details, such as usefulness for teaching or research, is prepared in advance of each meeting and the Serials Manager has budget details to hand. Members comprise the Serials Manager, the Collections Development Manager, a member of the liaison team, a Library Assistant member from the serials team and the Manager of Information Services, who chairs the group.

A similar group to oversee e-book subscriptions is due to be set up in the near future.

The newly formed eResources Discovery Group (eRDG), is tackling some of the most challenging problems facing hybrid libraries. As its name implies, its remit is to offer recommendations to senior management regarding all aspects of discovery of electronic resources made available by LSE Library. Since its recent formation, it has made one decision, fundamental to cataloguing conventions at LSE. With large numbers of titles made available in both electronic and print format, a formal decision was needed on whether to use single/combined or separate records for each title. Practice up until this point had been mixed and confused. The need for this decision was particularly pressing because the purchase and integration of MARC records for all e-journals needed to be finalized before the end of the financial year. Members of the group rose to the challenge and the pros and cons of both solutions were listed. This was informed by investigating practice in the UK and abroad. Messages posted to UK discussion lists resulted in many responses, often indicating a similar dilemma in other institutions. The decision was finally taken to opt for separate records. However, the group discovered that there will be exceptions to this rule, and is currently working on guidelines for these situations.

The next major challenge to be tackled over the coming months is that of which system should include records of each type of e-resource. When metadata is stored on an OPAC, an electronic resource discovery system and an e-journals management system amongst others, the situation for end-users can be confusing. In addition, it can result in duplication of work for library staff. Work has begun on this problem, and will continue over the remainder of the year. The group draws on experience from around the Library and comprises members of the bibliographic services and serials teams who have cataloguing expertise, a liaison librarian who also has responsibility for updating Encompass (the LSE library e-resource discovery

system from Endeavor), the member of the Library IT support team with responsibility for the library management system, the Data Librarian, the Teaching Services Support Librarian and the E-services Librarian (chair).

Acting with a similar, but definitely separate remit, the Electronic Library Working Group (ELWG) is considering phase two of the implementation of Encompass. The main items on the agenda for this group include the metadata, data structure, searching and customization. The two groups work closely so that there is no duplication and each informs the other.

The Data Librarian takes responsibility for all aspects of datasets. In 2004 the Data Advisory Group was set up so that decisions regarding subscriptions could be discussed with interested academic staff. This group has been particularly successful and, because of the end-user input, there is a high degree of satisfaction with dataset provision. Owing to its social sciences focus, datasets form a crucial part of the e-resources collections and LSE is a particularly heavy user of these, often expensive, resources.

Although it is a new service, the LSE institutional repository, LSE Research Online, is developing fast (see http://eprints.lse.ac.uk). It is the responsibility of the E-services Librarian who reports to the Manager of Information Services. LSE Library employs an E-prints Assistant to help with the setting up and population of the repository. Senior management has recently agreed that a detailed development programme may proceed to ensure that the repository will be sustainable and incorporated into mainstream library services.[1]

Making quality resources available to end-users is pointless unless users a) are aware of them and b) know how to use them. The Library employs standard methods of fulfilling these needs with user training (run by liaison librarians and the Data Librarian), publishing guidance and help documents (both in print and online), staffing an information desk during opening hours and providing an enquiry service. It is important therefore, when any changes in subscriptions occur, that relevant staff are alerted so that any documents are updated.

Responsibility for licences is divided between a number of staff. The Serials Manager is the person who checks and signs all licences, although the E-services Librarian is now taking on this role

for e-sources. Copies of licences have been retained in the serials department and gathered by the E-journals Co-ordinator. It is expected that the licence functionality of Meridian (the electronic resource management system from Endeavor) will be utilized shortly to record permissions and so on, but work is still underway to define exactly how LSE is going to use this facility and to clarify work flows.

Budgets for e-resources are set for each type (see above). A subscription agent is used for the majority of e-journals and some e-sources and this allows for some administration to be outsourced. There are instances where subscription has proved problematic (for example, when obliged to accept complex restrictive access permissions) and in these cases, purchase is made direct with the supplier. Spend and the accuracy of reports from the School's finance department are monitored closely by budget-holders.

Systems

LSE Library makes use of the Voyager and Encompass systems as its library management system and electronic resource discovery system respectively. In addition it uses the Serials Solutions electronic journals management system, which made a remarkable difference to the management and use of serials when it was implemented in 2004. This system allows the library to perform journal overlap analysis and also provides some usage statistics.

Setting up a proxy server (EZProxy) as a tool for remote access has enabled access to some resources off-site which would not otherwise have been possible. It also has the benefit of requiring School login details which users are less likely to forget than other passwords. There is now a reasonably long list of resources available via EZProxy, although not all resources include mention of a proxy server in their licence agreements and the supplier has to be contacted in order to arrange permission for such access. Most suppliers have been willing to allow permission and for some smaller organizations, LSE has been the first to request access via proxy server.

As well as EZProxy, LSE uses Athens authentication for a large proportion of its e-resources. One member of staff acts as the Athens administrator and, because she is also the person responsible for updating the E-library (i.e. Encompass), communication regarding changes is not a problem.

The library project team, which has been developing middleware, is currently working closely with information services staff on early adoption of Shibboleth access management for authentication and authorization. Work is progressing rapidly and Shibboleth should be being extensively tested during the academic year 2005/06.

As yet, there is no link resolver running at LSE Library, but this situation is due to change during the coming months.

Managing such a large, rapidly expanding and diverse collection of electronic resources has been complex and sometimes fraught. Over the last year or so, though, procedures and staffing have been put into place to streamline such management. Once Meridian,[2] the electronic resource management system, is fully implemented, the aim is that management will be more ordered and simplified, especially as information about each resource will be retained in one place. The reporting functions of Meridian should enable the library to set up reports and alerts to aid the process. One of the problems of keeping records about resources is that they can end up scattered in a number of locations depending on who might use them. For example, acquisitions information is held on the library management system acquisitions module, licence information is either in an electronic or a physical file (more likely to be a number of files depending on resource type), administrative information and passwords may be held somewhere else, usage statistics information has been dispersed, and so on. So the time it takes to add data to Meridian should be worthwhile if integration with other library terms and the reporting and alerting functions operate as planned.

Continuing development

Although the task of managing electronic resources whilst developing them at the same time is difficult, the procedures and systems being implemented at LSE should result in a more effective operation.

There is, nonetheless, room for improvement, particularly in the areas of e-books provision and resource discovery. The implementation of a link resolver will aid users in accessing resources. A number of formal policies and strategies for e-resources are in the process of agreement and introduction. Work in developing these will help to clarify collection development, work flows and strategic aims. The gathering and utilization of usage statistics and formal procedures for the evaluation of e-resources are being improved and implemented in the short to medium term.

Notes

1. See 'The Institutional Repository at LSE: plotting our course' presentation at ALISS conference 2005 available at:
http://www.lse.ac.uk/library/other_sites/aliss/ Rumsey.ppt [accessed 22.8.05]

2. LSE library has been one of the development partners for Meridian, the electronic resource management system from Endeavor. The LSE Meridian Implementation Group spent time testing and contributing details of the needs and experiences of end-users of such systems to Endeavor. This has been time-consuming, but rewarding work. The group will continue to meet until Meridian has been mainly fully implemented, expected to be around July 2006.

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