E-Resources Management: How We Positioned Our Organization to Implement an ERMS

Electronic Resources and Libraries Conference

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National Institute of Standards and Technology
U.S. Department of Commerce

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National Institute of Standards and Technology

- Non-regulatory agency within the US Department of Commerce
- About 1500 scientists and 1800 guest researchers and post-doctoral students
- NIST's Mission:

  "To promote U.S. innovation and industrial competitiveness by advancing measurement science, standards, and technology in ways that enhance economic well-being."

Gaithersburg, MD

Boulder, CO

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Information Services Division (ISD)

Mission:

"To support and enhance NIST's scientific and technological community through a comprehensive program of knowledge management and superior customer service."

Organizational Structure:

- Research Library and Information Group (ISD)
- Electronic Information and Publications Group
- NIST Museum and History Program

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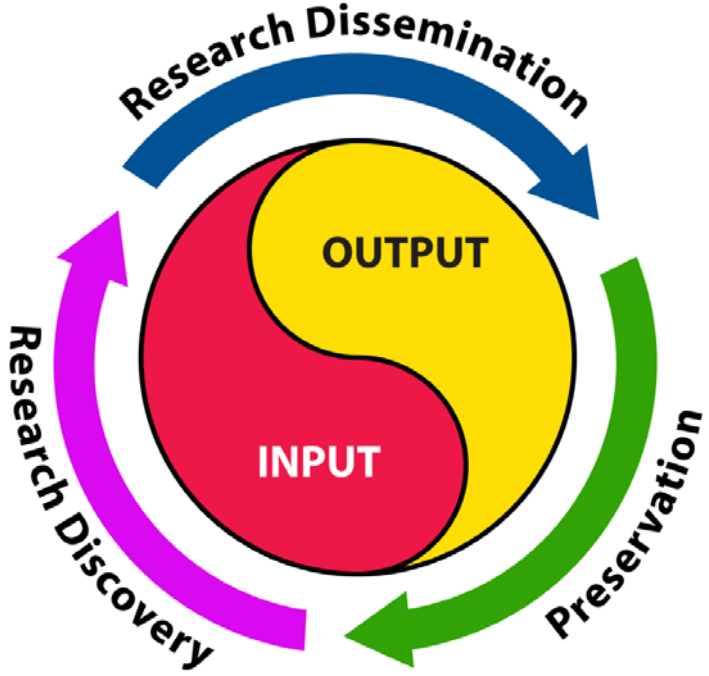
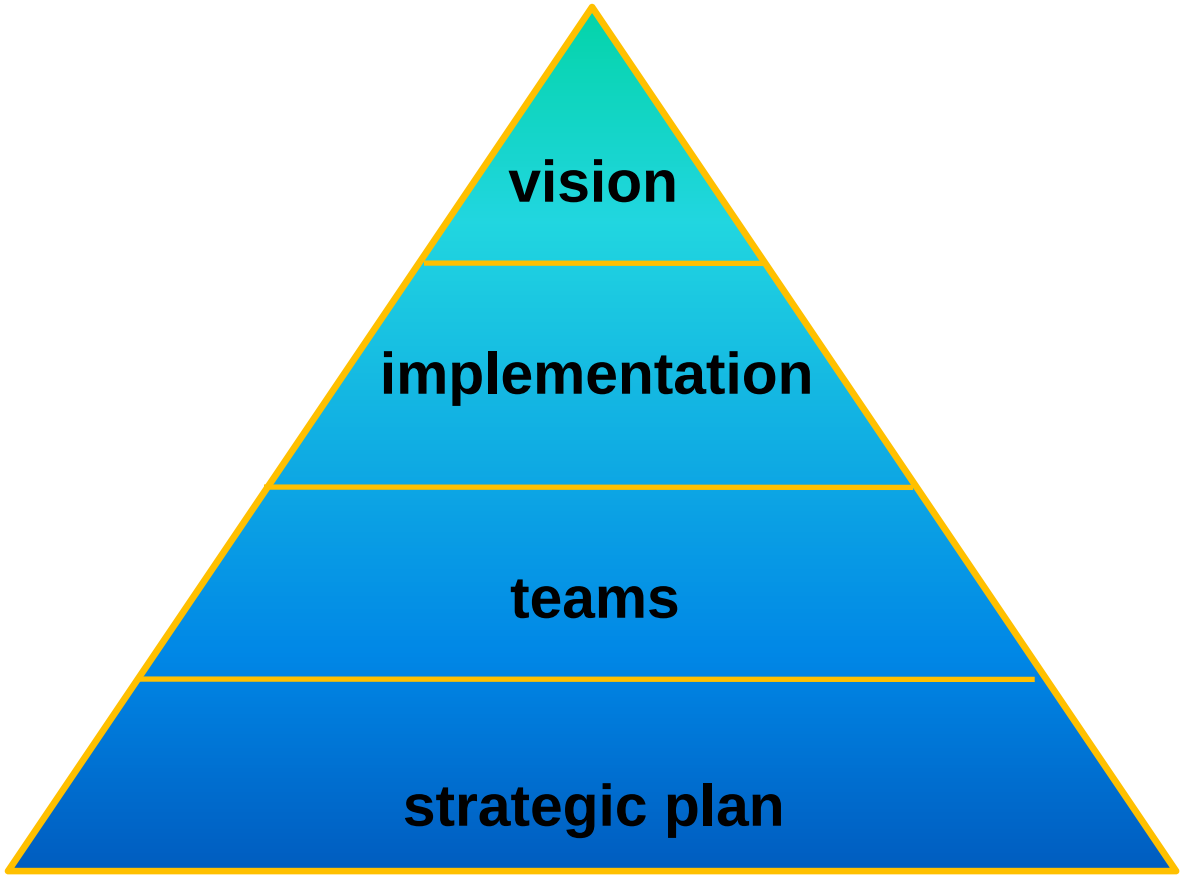
Knowledge Continuum



The Knowledge Continuum illustrates the various stages and elements involved in the research and publishing cycle. It provides the overarching philosophy that drives ISD's products and services.

How We Achieve Our Goals



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ISD Environment — Core Values

- Innovation and risk-taking
- Flexibility, adaptability, and alignment to NIST Strategic Plan
- Performance excellence; leadership development
- Focus on customers
- Use of cross functional groups/teams

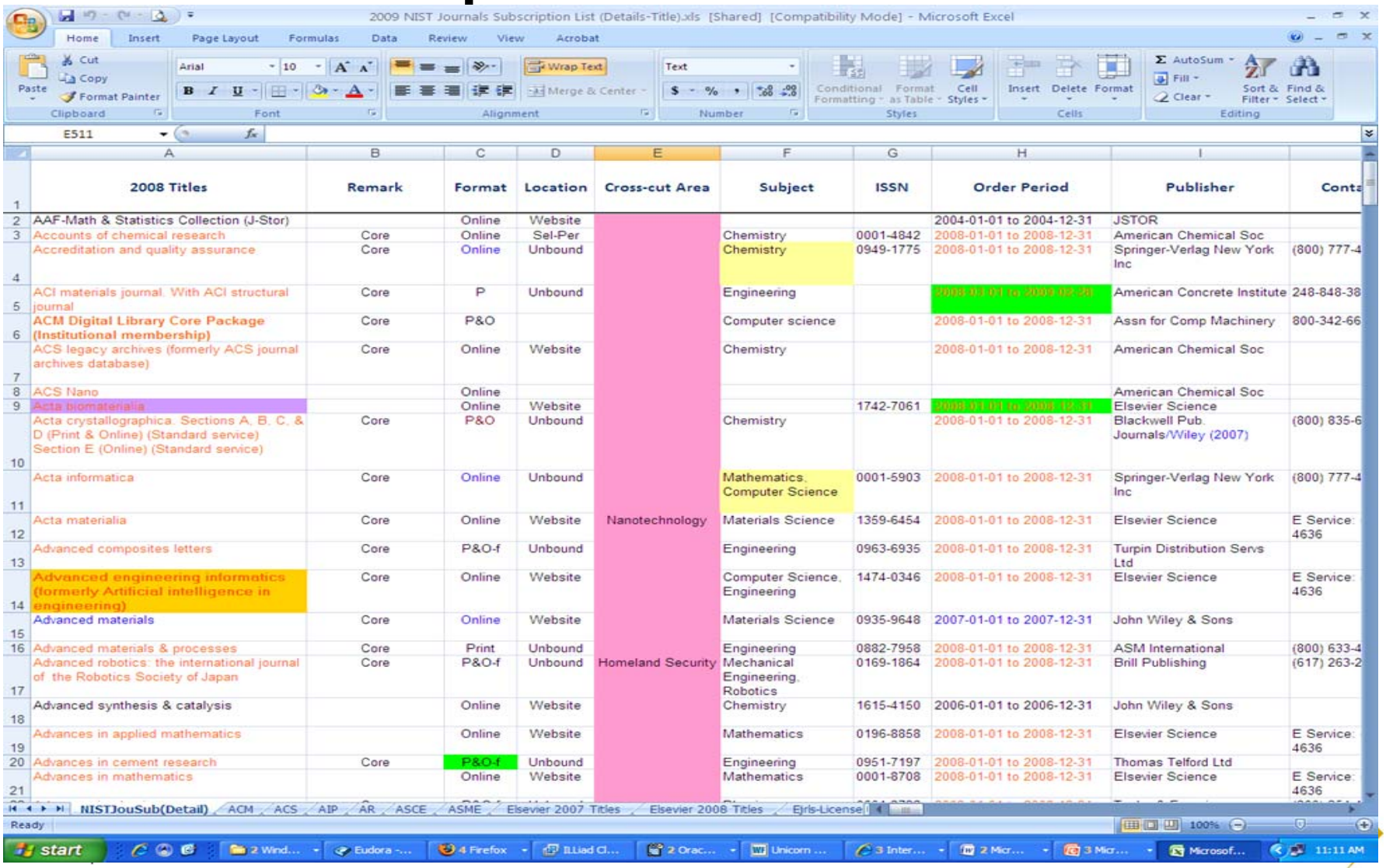
ERM Teams One and Two

- Team One: Product selection
  - Systems SIRSI Administrator (Lead), Serials Librarian, Serials Technician, Interlibrary Loan Librarian
- Team Two: Implementation
  - Serials Librarian (Lead), Interlibrary Loan Librarian, ILS Administrator, Serials Technician

Defining the Problem

- Multiple data entry points for business data
- Inconsistent metadata and siloed work processes
- Lack of central storage for license agreements and usage statistics
- Increasing complexity of maintaining e-journals
- Urgent need to improve workflows that manage key financial investments
- Customers and staff require timely information delivery
- First-generation record keeping unable to keep pace

“Spreadsheet Overload”



2008 Titles	Remark	Format	Location	Cross-cut Area	Subject	ISSN	Order Period	Publisher	Conta
AAF-Math & Statistics Collection (J-Stor)		Online	Website				2004-01-01 to 2004-12-31	JSTOR	
Accounts of chemical research	Core	Online	Sel-Per		Chemistry	0001-4842	2008-01-01 to 2008-12-31	American Chemical Soc	
Accreditation and quality assurance	Core	Online	Unbound		Chemistry	0949-1775	2008-01-01 to 2008-12-31	Springer-Verlag New York Inc	(800) 777-4
ACI materials journal. With ACI structural journal	Core	P	Unbound		Engineering		2008-01-01 to 2008-12-31	American Concrete Institute	248-848-38
ACM Digital Library Core Package (Institutional membership)	Core	P&O			Computer science		2008-01-01 to 2008-12-31	Assn for Comp Machinery	800-342-66
ACS legacy archives (formerly ACS journal archives database)	Core	Online	Website		Chemistry		2008-01-01 to 2008-12-31	American Chemical Soc	
ACS Nano		Online						American Chemical Soc	
Acta biomaterialia		Online	Website			1742-7061	2008-01-01 to 2008-12-31	Elsevier Science	
Acta crystallographica. Sections A, B, C, & D (Print & Online) (Standard service) Section E (Online) (Standard service)	Core	P&O	Unbound		Chemistry		2008-01-01 to 2008-12-31	Blackwell Pub. Journals/Wiley (2007)	(800) 835-6
Acta informatica	Core	Online	Unbound		Mathematics, Computer Science	0001-5903	2008-01-01 to 2008-12-31	Springer-Verlag New York Inc	(800) 777-4
Acta materialia	Core	Online	Website	Nanotechnology	Materials Science	1359-6454	2008-01-01 to 2008-12-31	Elsevier Science	E Service: 4636
Advanced composites letters	Core	P&O-f	Unbound		Engineering	0963-6935	2008-01-01 to 2008-12-31	Turpin Distribution Servs Ltd	
Advanced engineering informatics (formerly Artificial intelligence in engineering)	Core	Online	Website		Computer Science, Engineering	1474-0346	2008-01-01 to 2008-12-31	Elsevier Science	E Service: 4636
Advanced materials	Core	Online	Website		Materials Science	0935-9648	2007-01-01 to 2007-12-31	John Wiley & Sons	
Advanced materials & processes	Core	Print	Unbound		Engineering	0882-7958	2008-01-01 to 2008-12-31	ASM International	(800) 633-4
Advanced robotics: the international journal of the Robotics Society of Japan	Core	P&O-f	Unbound	Homeland Security	Mechanical Engineering, Robotics	0169-1864	2008-01-01 to 2008-12-31	Brill Publishing	(617) 263-2
Advanced synthesis & catalysis		Online	Website		Chemistry	1615-4150	2006-01-01 to 2006-12-31	John Wiley & Sons	
Advances in applied mathematics		Online	Website		Mathematics	0196-8858	2008-01-01 to 2008-12-31	Elsevier Science	E Service: 4636
Advances in cement research	Core	P&O-f	Unbound		Engineering	0951-7197	2008-01-01 to 2008-12-31	Thomas Telford Ltd	
Advances in mathematics		Online	Website		Mathematics	0001-8708	2008-01-01 to 2008-12-31	Elsevier Science	E Service: 4636

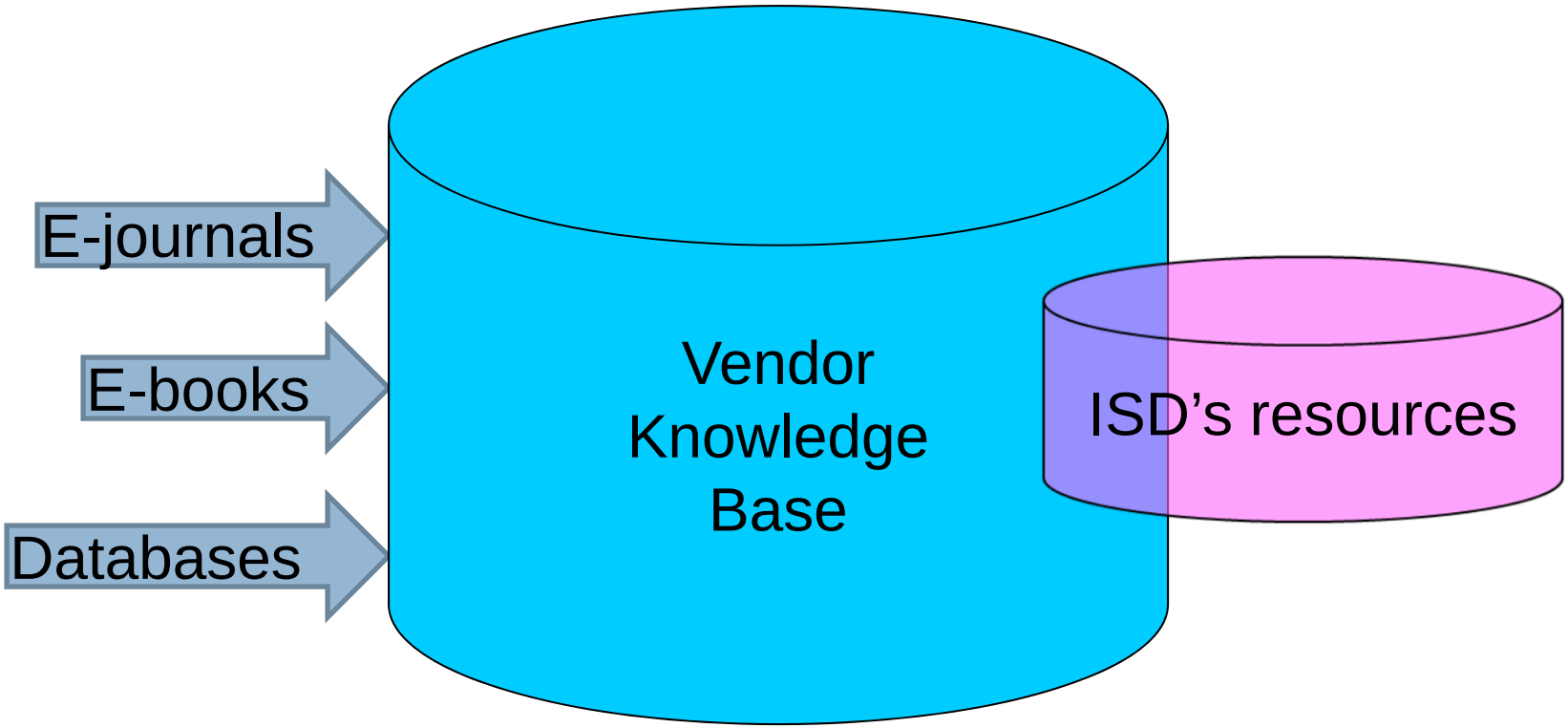
Team One: Information Gathering

- Consult product review articles & investigate existing and developing ERMS standards (DLF ERMI)
- Interview serials staff
- Conduct workflow and needs analyses
- Attend product demonstrations at local libraries
- Create list of system evaluation criteria for ISD

Team One: System Evaluation Criteria

- Maintenance of e-resource holdings within a single portal
- Storage of acquisition history and license information
- Collection development tool (usage statistics, cost data analysis)
- Ability to create customized reports
- Intuitive staff interface
- Customer-friendly public interface

Importance of Vendor Knowledge Base



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Team Two: Implementation Process

- Attend a 2-day vendor workshop
- Develop a strategy for data input
- Create a timeline and milestone deliverables
- Document processes and procedures
- Initiate Certification and Accreditation IT Security process with NIST OCIO
- Learn to navigate system; Collaborate on vision for maintenance and maturation of ERMS

Example of Timeline with Deliverables

Activity	April	May	June	Jul	Aug	Sep	Oct	Nov	Dec
Purchase decision	* ***								
Purchase process		******	*******	********					
Analyze workflow			*******						
Trainer visit					***				
Metadata strategy					Ongoing*	********	********	********	********
Load journal packages						********	********	********	********
Documentation						********	********	********	********
Test usage tool									********
Attach data to packages									********
Style sheet for public interface									********

Where We Are Currently

- Present system provides back-end solution for management of e-resources life cycle by:
  - Improving communication among library staff
  - Providing improved cost-per-click usage data
  - Consolidating package subscription data
  - Reducing redundant data entry
  - Providing efficient access to license agreement terms and conditions

Positioning for the Future

- Redefining staff roles
- Planned phase out of selected tasks
- Educating/training staff and customers
- Working with publishers and vendors
- Synchronization of systems into cohesive digital environment
- Creation of a central knowledge hub

Lessons Learned

- Began our search for a dynamic way to manage our e-resources, but quickly realized ERMS implementation is part of a bigger evolution that is happening in libraries
- Envision a system that will “push” back-end data to user-facing systems
- Strive to be open to all possibilities, flexible, and in-tune with our end users’ information ecosystem

Questions?

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