UC Electronic Resources Management Planning Meeting
Campus/CDL Survey- Electronic Resources Management at UCR

Please complete the following questions as thoroughly as possible. We especially encourage you to solicit opinions from staff who will be unable to attend the Planning Meeting on March 11-12. We assume that the survey response will represent the consensus view from your campus, so if there are differences of opinion within your campus, please note accordingly.

Submit the survey via return e-mail (stefw@ucr.edu) or fax (909/787-3720) to Stefanie Wittenbach, Chair, Program Planning Committee **no later than Wednesday, March 3rd**. Survey data will be compiled and distributed for discussion at the Planning Meeting on March 11th. Thank you!

1. Who is involved in an official capacity with electronic resources? Please list job titles and reporting structure for the position (e.g., electronic resources librarian in the Cataloging Department).

Lizbeth Langston, Science Continuations Coordinator (reporting in that capacity to Interim Head of Collections) - e-journals as one facet of Science serials/continuations.

Vicki Bloom-Interim Coordinator of Electronic Resources

Rhonda Neugebauer, Interim Head of Collections (CDO)

Stefanie Wittenbach, Interim Assistant University Librarian for Technical Services and Budget Analysis and Head of Acquisitions

Recruitments underway: Electronic Resources Coordinator; Serials and Electronic Resources Cataloger

Databases/Electronic Resources Committee (knowledgeable representatives from different departments): oversight, policy recommendations.

2. What tools, software or systems are you currently using to manage electronic resources decision-making, acquisitions, licensing, cataloging, maintenance, and access issues? (e.g., keeping track of license details, print subs. associated with the package, statistics, providing patrons with an e-journals directory, etc.)

Keep information in my head, email trail, some spreadsheets, consult CDL web pages. Developed and maintain an Excel spreadsheet of e-resources; email trail; Scotty online catalog; the various CDL pages and spreadsheets.

Our decision-making process has not been systematized, partly because our library is in the process of changing our CD network model. All serials must be approved by the CDO as are all purchases over $500. We recently formed a DB/ER committee to oversee the decision-making and recommendation process. We use our integrated system (Innovative) to track all new acquisitions (except those which are "free" or which notification has not been properly handled). The Head of Acquisitions handles licensing. Cataloging for CDL purchases is obtained through the SCP. Local purchases are cataloged in-house. We do not have the staffing to systematically pull and compile statistics from the different vendors. We have developed an electronic resources trouble-shooting form – troubleshooting is handled by several departments and people in the library. We do not have a comprehensive e-journals directory. Most e-journals are reflected in Scotty (not L/N). In addition, Infomine does reflect our e-journal holdings. Subject access and sorting of e-journals is difficult.

3. What aspects of any tools, software, or systems that you currently use to manage electronic resources work well or sufficiently? What if anything would you recommend to others?

The Excel spreadsheet is limited. We have no internal mechanism that supports and tracks those products under consideration and what decisions were reached.

4. What isn't working? What parts of electronic resources management are not well covered by your current system? Where are your greatest points of pain?

Knowing what's under negotiation and the status of the negotiations; what the status is once something has been agreed to. Centralized evaluation process for resources being considered (who is reviewing, what is the trial period, feedback, etc.)

The need for advance renewal notification and expected future expenditures. The JSC and CDC's timetable is the greatest point of pain. We are not able to react so quickly to expensive decisions and plan for the necessary budgetary allocations. It would be helpful to know what the other campuses' funding for new resources is. For some resources, there needs to be more time to look at competitive vendor platforms. I also am disappointed by the way trials work – why isn't there one page in which ALL UC library staff members can do to see what is under trials and under consideration by the different bibliographer groups?

Formalize the process of bibliographer groups and cancellations. Centralize communication through better utilization of the user services liaisons? Decision-making steps aren't well covered in existing documentation or followed by different bibliographer groups or for new tier 2 coordinators.

5. What are your campus' greatest needs in terms of electronic resources management and related systems?

Smoother communication mechanisms, centralization of data, more time/people to manage the resources, write informational/promotional items for internal & patron use. Data at the CDL website needs to be consistently presented and updated in a timely fashion. To find about one resource, I often have to consult 4-5 different places. Much of the data I do find is quite dated.

6. What are your immediate, mid-and long range top priorities for electronic resources management and related systems?

We are in the process of updating our simple database of databases of everything that our Library subscribes to.

Short-term: Improve communication on collection development decision-making. Hire our dedicated person for electronic resources to coordinate for our campus. Review and better organize the myriad CDL web pages devoted to e-resources data gathering.

Mid-range: Centralized system for managing local and shared resources; look at retention/binding for print associated with electronic; finalize in-house workflow processes for collection development decision-making and e-resources management.

Long-term: Evaluate platforms and use of shared resources to identify potential cancellations and targets for consolidation of vendors for users' sake. Develop better oversight of all resources at the macro level. Add staff for cataloging and subscription management. Address faculty interest in digital visual and audio media. Acquire better computers and printers for patron use of e-resources.

7. What are your campus' current plans for addressing your campus' top priorities and needs?

Hopefully, the internal process we use for making decisions about electronic resources will be improved and better coordinated in the near future. Adding two new librarians whose primary jobs will be devoted to electronic resources will help alleviate some of the daily problems we face.

8. Are you considering purchasing systems or products for electronic resources management?

We will probably consider III's ERM once we know what the cost is.

9. What are your campus' greatest needs with regard to shared/system-wide electronic resources management?

More time to plan, make decisions, and budget. Advanced notice of pending renewals. In addition, there needs to be systems/procedures in place to work smoothly and allow a proper balance of centralization and decentralization of decision-making and work flow. Good report generation (statistics, renewals, etc.)

10. In your opinion, what are the greatest barriers to implementing a UC-wide ERM system?

1) Human communication systems aren't in place. SOPAG/CDL/Campuses are complex social structures. 2) The "hurry up and make a decision" mentality. 3) Conversion of existing data to the new system.

The sheer scope of what people want versus what is realistic for a system to do. Who are the stakeholders? Who is paying for this system? And more importantly, who will keep this system up-to-date? The document that details the needs assessment is quite lofty. Priorities need to be set. I think that a small group needs to be formed to further investigate a system – a group comprised of people who deal with this stuff on a daily basis! But a dollar amount must be discussed beforehand.

11. Anything else you'd like to share?

Go back to semi-annual renewals (January/July; Dec/June) as was in place when CDL began. This would make financial planning easier and rollout for the reference staff and patrons easier to deal with.

Some bibliographer groups are stronger and more vocal than others – resources are heavy in some fields as compared to others. It also seems that some vendors have the ear of the CDL and others are "locked" out. We also need to look at the popular products that we have on a periodic basis – are they available on the "best platforms" for our users.

I'd like to see more products available under a single platform. Our users find SFX difficult to use and frustrating.