ELECTRONIC RESOURCE MANAGEMENT THEN AND NOW: MAXIMIZING EFFICIENCY WITH A SMALL STAFF

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Introduction

Keeping pace with the rapid advance of library technology and electronic services can be both exciting and daunting, especially for libraries with a small (but mighty!) staff. Out of necessity, small staffs often undertake many disparate tasks in order to keep electronic resources running smoothly for users. Because of these constraints, it is useful for small library staffs to take a step back and consider re-organization in order to streamline their processes and maximize staff efficiency. As two librarians of a small staff (one veteran acquisitions librarian, Lynné Colbert, and one newcomer, electronic resource management librarian, Caitlin Balgeman), we seek to explain our current methods of re-organizing our electronic resource management (ERM) responsibilities and workflows in ways that make sense for our evolving library. For each of our three focus areas, we will describe our shifts in practice and list practical ways other small library staffs can re-focus their efforts in order to make the most of their time, and ultimately improve external service by improving internal workflows.

Division of labor

Electronic resource management has always been a challenge with our small staff. We migrated to a new library management system (LMS) in 2014 and the urgency to create new workflows increasingly became critical. With four full-time librarians and initially no dedicated librarian for electronic resources, we split responsibilities as best we could. The acquisitions librarian purchased the resource and the systems librarian proxied it. If it was a title used by our medical school, our health science librarian would help out. Sometimes the cataloger would get involved depending on the issue. The process changed resource to resource. Predictably, some steps would get missed. In order to properly handle electronic resources, we advocated for our next position to be a dedicated electronic resources management librarian. This allowed us to have a single individual to visit if someone had to troubleshoot an access problem or turn on items in our holdings management tool.

Our current efforts in dividing workflows focus on the logical grouping of tasks rather than assignments based on who happens to be the least overloaded at the time. A common feature of librarians, particularly in small libraries, is they "wear many hats." While this practice is often a necessity, and cross-training is beneficial, it means everyone can do multiple jobs. However, just because a person can do a task does not mean they should. Currently, our library is taking a step back and looking not at who is capable of various tasks, but where these tasks would fit in a person's overall job description. The advantages of this are many. It means each person can focus their efforts on related instead of dissimilar tasks. It also means if the library needs to hire for any of these positions, they are not in the awkward spot of trying to find a "purple squirrel," someone who just happens to have experience in archives and acquisitions and access services, for example, or who would even want to do all of those jobs. Based on our staff's experience with transitioning to having a dedicated ERM librarian, we recommend the following:

- **ERM task clearinghouse:** Write down all of the tasks and steps involving electronic resource management that happen in your library and look at who currently does them. As a staff, decide whether these make sense, and what can be consolidated or simplified.
- **Evaluate your job description:** Go over the job description you were given when you were hired. Are these tasks actually what you spend your time on? Investigate your institution's process for updating your description if need be; doing so will help your

colleagues if you leave, and will help you focus your efforts and explain your value at your current institution.

Holdings management

Holdings management can be incredibly tricky depending on the vendor. If it is a popular collection, the vendor may have already provided the title list to the LMS provider and access is a simple click of a box. However, when it comes to newer resources, the workflow can be a lot messier. Decisions need to be made to determine if someone should contact the vendor to persuade them to provide their information to your LMS provider or if a KBART (Knowledge Base and Related Tools) file needs to be created by a librarian. Initially for us, KBART files were created by the systems, cataloging, and health science librarians depending on who had the availability at the time. This put unnecessary responsibility and stress on everyone.

Communication amongst our small staff is very good, but having more people making adjustments in the knowledge base (KB) means more potential guesswork for the others when trying to troubleshoot or puzzle out what has been done previously. By working to consolidate some of these KB-related tasks under the electronic resource management position, we hope to minimize some of the guesswork and have the ERM librarian become a more primary contact both for users and providers when e-resource issues arise.

- **Document, document, document:** Whether it is within your LMS or a simple shared document, make sure to keep track of critical information for each resource from purchase to promotion. This eases the workload transition from multiple people to a single ERM librarian.
- **Seek out best practices:** Determine who at your institution has knowledge that should be documented and passed on to an ERM librarian, and look to consortia or other

institutions for insight into how to improve resource management. Use this period of change as an opportunity to crowdsource new information and put it into practice.

Vendor contacts and troubleshooting

Troubleshooting, like other areas, has been handled very scattershot in the past. The resource and time constraints determined who handled troubleshooting. Familiarity and previous contact with a vendor representative also played a role. However, like other issues mentioned previously, some steps were missed. Troubleshooting can require several points of contact with a vendor, either via email or phone or both. If multiple people are working on an issue, there is potential for duplication of work or missed steps along the way. In order to minimize mistakes and create efficiency, assigning certain tasks to an individual is critical.

This area is definitely a work in progress. Currently, there are instances where another librarian will still contact the vendor or provider directly about an issue, especially if it is pressing and they have the opportunity to remedy it right away. However, in our new model, other librarians are passing more issues and pertinent vendor information to the ERM librarian in order to foster familiarity with each of the providers and take on the often time-consuming work of monitoring an issue to its resolution.

- **Vendor contact master list:** Generate a vendor contact master list, or update your existing list by gathering information from all the librarians who talk to vendors.
- **Divide and conquer:** Determine a point person for tasks such as troubleshooting technical issues, purchasing and renewal, etc. Decide if you want these to be under the same person or different people, then stick with your arrangement. It takes time to get used to, but the division will eventually make tasks and jobs simpler.

Assessment

Assessment of electronic resources traditionally came at renewal time. The library uses a shared spreadsheet of all the subscription resources on it along with cost, downloads, and cost per use. In order to justify a renewal, the cost per use had to be less than the cost to borrow it via interlibrary loan from another institution. It required a lot of pulling data on behalf of the acquisitions librarian and plenty of math skills. However, with the new LMS, there came the promise of being able to cross reference the license to use to have a more streamlined approach to pulling data. While this functionality evolved, we did not have the staff to be able to utilize it to its full potential.

Now that our institution has a dedicated ERM position, we are making a more concerted effort to assess the use of our electronic collections, and to make this a combined effort with acquisitions' assessment of print material use. Additionally, the ERM librarian is becoming the point person for reporting statistical usage on electronic resources out to our consortium. Because of the clarification of duties in other areas of electronic resources, when it comes to assessment, our library is looking to use these position delineations to simplify combined efforts between acquisitions and ERM. Instead of the acquisitions librarian having to work with multiple librarians to get a clear picture of electronic resource use, we are moving towards a model in which acquisitions can work with ERM and have a solid foundation from which to make renewal and collection development decisions before consulting subject liaisons.

- **Put it on the calendar:** Make a plan for regular periods of assessing your collections (ideally, have it coincide with renewals so you can use the data in your decisions). Make this a regular part of your larger electronic resource management workflows.
- **Get to know your LMS**: Utilize your LMS's reporting and workflows to streamline data pulling so more time is spent on analyzing the data than collecting it.

Conclusion

Libraries are constantly evolving as the landscape of technology, resources, and services shifts, and this can be a challenging place for small library staffs to thrive. Certain tasks and planning can fall by the wayside due to time constraints. Even when this is not the case, it is easy to fall into the mentality of "I can just take care of this myself," especially for helpful, service-oriented librarians. When undertaking a transition such as ours, there will be growing pains at the beginning where it feels like tasks are taking longer. However, always keep in mind the long-term goals of logical, simplified processes and increased staff efficiency when short-term inconveniences arise. Staying on top of new methods requires librarians to make time for strategizing in order to better organize themselves and therefore better serve their users.

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