

# COLLABORATIVE ELECTRONIC RESOURCE MANAGEMENT

From Acquisitions  
to Assessment

JOAN E. CONGER

# Contents

<i>Illustrations</i>	<i>xiii</i>
<i>Acknowledgments</i>	<i>xv</i>
<b>1. INTRODUCTION</b>	<b>1</b>
Electronic Resource Management as Library Management	1
Key Themes	2
Key Concepts	4
Electronic Resources	5
Library	5
Library Professional	6
Leadership	6
Customer	7
Value	8
Electronic Resource Manager	8
How This Book Changed My Life	9
Organization of the Book	15
References	17
Further Reading	17
<b>2. MANAGEMENT</b>	<b>19</b>
Contextual Information and Change	21
Systems Thinking	21

Contextual Experience	22
Information and Effort	24
Command	26
Consult	27
Vote	27
Consensus	28
The Effort of Hierarchy and Collaboration	29
Adaptive Learning	32
A Word on Experimentation	35
Purpose	36
The Current Situation and the Ideal	38
Forces That Hinder and Help	40
Actions	41
A Word on Writing	41
Groups	42
You, the Individual	44
Conclusion	46
References	47
Further Reading	48
<b>3. ASSESSMENT</b>	<b>51</b>
Decisions Based on Assumption	52
Output Statistics	52
Politics	53
Decisions Based on Assessment	56
Customer Experience	56
Learning from the Library's Environment	58
The Assessment Life Cycle	59
Service Quality Assessment	61
Process Analysis	62
Output Data	63
Outcomes Assessment	63
Examples of Assessment	64
Service Quality Assessment	65
Definition	65
Standards	66
Examples	66

Process Analysis	66
Definition	66
Standards	67
Examples	67
Input and Output Data	68
Definition	68
Standards and Examples	68
Outcomes Assessment	68
Definition	68
Standards	69
Examples	69
Conclusion	69
References	70
Further Reading	73
<b>4. BUDGETING AND PLANNING</b>	<b>75</b>
Planning for Value	76
Planning as Learning	77
My Funding Authority Does Not Ask for Value	80
Collaborative Groups	82
Negotiation Through Cost and Benefit	82
Negotiation Through Costs	83
Vendor Profit	84
Cost to the Library	85
Cost to the Customer	86
Negotiation Through Benefits	86
Vendor Benefits	86
Library and Customer Benefits	87
The Library's Counteroffer	88
Negotiation	89
Rule 1: Surprise is the enemy to you both	89
Rule 2: Be willing to walk away	90
Pricing Models	90
Conclusion	92
References	93
Further Reading	95

5. COLLECTION DEVELOPMENT AND ACQUISITIONS	97
Customer Needs	99
Policies	100
Policies as Learning Documents	102
Policy Life Cycle	104
A Word on Short Documents, Bullets, and Prioritization	106
Selection Criteria	108
Traditional Selection Criteria	109
Criteria Unique to Electronic Resources	110
Conclusion	111
References	112
Further Reading	114
6. LICENSING	117
The Economics of Publishing and Open Access	118
License as Contract	121
Protecting Users, Uses, and Access	124
License Management	126
Establish Guidelines	129
Prioritize License Provisions	130
Review and Training	130
Third-Party License Management	131
Automating License Management	132
Conclusion	132
References	133
Further Reading	134
7. CATALOGING AND ACCESS	137
An Overly Brief Introduction to Cataloging	138
Cataloging Rules: AACR2	143
Cataloging Structure: MARC	146
Escape from the Fixed MARC Record	148
Relational Databases	151
Metadata and Extensible Standards	156
The eXensible Metadata of XML	157
MARC and Metadata	161

Dynamic Delivery and Interoperability	161
Cataloging as a Group Effort	164
Conclusion	166
References	166
Further Reading	170
<b>8. TECHNOLOGY INFRASTRUCTURE</b>	<b>171</b>
Level 4: User Interface	173
Level 1: Hardware	175
Training	177
Selection and Purchase	178
Maintenance	180
Security	181
Ergonomics	182
Level 2: Connectivity	182
Servers and Clients	183
Networks	184
IP Addresses	186
Authentication	187
Outsourcing	188
Level 3: Software	189
The Object-Oriented Perspective	190
Seamlessness	191
Conclusion	194
References	195
Further Reading	197
<b>9. CUSTOMER SERVICES</b>	<b>199</b>
First Order of Contact: Direct Service	202
Service Design from an Open-Systems Perspective	203
Perceptions of Information-Seeking Behavior	205
Design of Physical Space	208
Service Relationships	208
Assessment of Direct Service	210
Second Order of Contact: Indirect Service	211
Responsive Research Environments	212
Information Literacy	215

Assessment of Indirect Service	217
Third Order of Contact: A Usable Environment	217
Usability and Accessibility	218
Vendor Products	221
Marketing	222
Conclusion	225
References	226
Further Reading	229

*Glossary* 231

*Index* 237