

Strategic Plan
Electronic Resources Management
Folke Bernadotte Memorial Library
Gustavus Adolphus College
February 2009

Section 1 Introduction, Mission and Vision, Goals, Supporting Partners

Introduction

Electronic resources management at the Folke Bernadotte Memorial Library at Gustavus Adolphus College involves coordinating a range of electronic resources for teaching and learning, from online reference works, to individual electronic journals, to publisher databases of electronic journals, to electronic indexes, to large aggregator databases that include a combination of indexing and full text content. It also involves managing the tools we use to administer these resources and to make them available to the Gustavus community.

Electronic resources, the tools we use to manage them, and the needs and expectations of the students and faculty who use them are constantly evolving. Similarly, the roles, responsibilities, and workflow of the library faculty and staff who manage them are in flux. Given the dynamic nature of electronic resources management, we have attempted to create a dynamic and flexible strategic plan, one that we expect to evolve over the years. We hope that this plan will help guide us through the next five years, at which time we will re-assess our strategic goals and initiatives.

Mission and Vision

Our electronic resources management program supports the mission and vision of the Folke Bernadotte Memorial Library as stated in the library's strategic plan:

Mission: *The library advances the teaching mission and intellectual life of the college by selecting and facilitating access to information and by instructing in its use, interpretation, and evaluation.*

Vision: *The library will play an essential role in engaging students in critical inquiry and developing the skills and dispositions of life-long learners, prepared for lives of leadership and service in a diverse and fast-changing world. To do this, the library will support the curriculum with materials and opportunities for course-related and independent learning; will provide leadership in fostering information literacy across the curriculum; will inform the community of emerging issues in information policy and trends; and will support the intellectual and cultural life of the college by developing programs, collections, and an engaging physical and virtual space for exploration.*

Goals

1. Advance the library's policy of selecting and acquiring electronic resources that support the college's liberal arts mission.
2. Organize, manage, and promote seamless access to the library's electronic resources in support of teaching and learning.
3. Develop strong collaborative relationships with our supporting partners to advance our electronic resources management program.

Supporting Partners

While the electronic resources librarian and serials manager assume primary responsibility for electronic resources management, we collaborate with a variety of partners in order to advance our program. Partners at Gustavus include faculty, staff, and student assistants from the library, faculty in the disciplines, and Gustavus Technology Services. Partners beyond Gustavus include library networks such as the MINITEX Library Information Network, the Oberlin group of liberal arts college libraries, and the Consortium of MnPALS Libraries, as well as electronic resources publishers, subscription agents, and vendors.

Section 2 Strategic Review: Strengths, Weaknesses, External Factors

We must assess the strengths and challenges of our current electronic resources management program in order to meet our strategic goals. The following paragraphs highlight areas of strength and weakness and describe external factors that influence electronic resources management.

Strengths

We can enhance our electronic resources management program by drawing upon some of our existing strengths. We have a strong service orientation and are responsive to student and faculty needs. We operate within a collegial management environment that allows for flexible roles, gives us freedom to explore, and facilitates communication and collaboration amongst our relatively small staff. We have an active Publications and Web Committee that plays an integral role in providing access to electronic resources through the library website. We have strong working relationships with our colleagues and student assistants in the library, with Gustavus Technology Services (including a library technology specialist), and with members of the faculty in a number of the disciplines. We have in place systems for shared access to our electronic resources management documents.

Weaknesses

Our current electronic resources management program also presents us with a number of challenges. One weakness of our existing system is that it is dispersed across multiple spreadsheets, documents, and files. We manage our electronic resources budget in a

variety of systems, ranging from spreadsheets to our online catalog's acquisitions module, to our journal subscription service. Our usage statistics management program is particularly lacking; it is time consuming and inefficient, and could be improved greatly in order to support our collection development program. The roles, responsibilities, and workflow for the library faculty and staff involved in electronic resources management are often ambiguous, and our cross-training program warrants improvement. We need more thorough documentation and expanded policies in order to support more efficient decision-making and deliberate workflow planning. Our workflow has not kept pace with our move to an increasingly electronic collection, and our budget has not kept up with the rising cost of electronic resources. In general, we have insufficient funding, staffing, and time to take a proactive approach to electronic resources management, an approach that would allow us to evaluate our existing systems and explore innovative projects and programs.

External Factors

A variety of external factors affect our electronic resources management program. As stated above, our partners include library networks such as the MINITEX, the Oberlin group of liberal arts college libraries, and the MnPALS Consortium. When these networks make changes to the services they offer—from group subscription brokering to technical support—those changes can have implications for electronic resources management at Gustavus. Our external partners also include electronic resources publishers, subscription agents, and vendors. When they change their services or modify the content, format, pricing, or terms of use of their products, our program is affected. Another challenge to electronic resources management is the fact that our electronic resources and the tools we use to manage them are not always integrated; we must administer multiple stand-alone systems in order to manage our program.

Larger forces beyond the specific products and organizations with which we work also affect our program—from the general volatility of electronic resources in terms of access, cost, and licensing terms; to the ever-changing technology available for providing access to electronic resources; to the changing demographics, needs, and expectations of our students and faculty; to trends in intellectual property and scholarly communication. These factors make electronic resource management both exciting and challenging as we strive to meet changing needs with available resources.

Section 3 Strategic Initiatives

The following new and enhanced activities and programs will help us to meet our strategic goals. Since each initiative has the potential to support all of our goals, we have not aligned the initiatives with specific goals.

1. Conduct a workflow analysis. We will conduct a systematic analysis of electronic resources workflow, including work currently done by the electronic resources librarian, the serials manager, other library faculty and staff, and student assistants. The workflow analysis will provide the groundwork for developing a

more efficient and effective workflow. A redefined workflow may lead to changes in what we do, how we do it, and who does it. The ultimate hope is that it will create space for pursuing new projects and allow us to take a more deliberate, less reactive, approach to electronic resources management.

2. Create an effective documentation system for electronic resource management. We will identify, create and maintain current documentation for electronic resource management, including policies, procedures, and workflows. The documentation should be accessible to library faculty and staff and to patrons, when appropriate. This initiative will reduce duplicate, outdated, and hidden documentation, and make our electronic resources management program more transparent and efficient.
3. Develop an effective electronic resource management system (ERMS) to assist us in managing the details of our subscriptions, from licensing terms to usage statistics. We will explore a range of ERMS options, from commercial products, to open source software, to locally developed databases and spreadsheets. While we ideally would like to coordinate all of our electronic content in one system, we may find it best to use alternate systems for certain types of information. For instance, it may be that ERMS software works well for databases, while a separate module is best for individual e-journals that we manage through our subscription agent. Developing an effective ERMS not only involves identifying tools with which to manage our subscriptions, but implementing an effectual system for communicating information about those subscriptions to library faculty and staff and, in some cases, teaching them to use the ERMS themselves.
4. Advance seamless access to electronic resources and the systems we use to support them. We will explore ways to provide our patrons with more seamless access to electronic content through a variety of tools, from database interfaces, to the online catalog, to link resolvers, to federated (one-stop) search tools, to the library's web site, to the course management system. Our hope is not only to advance access to learning resources for patrons, but also to promote better integration of the internal systems that our library faculty and staff use to manage them, from our ERM systems, to our web page authoring environment, to our online catalog staff modules, to our systems for tracking budgets.
5. Designate time and space for collaborative research and exploration. We will make research and exploration a priority and deliberately assign time and space for it. A collaborative approach to identifying improved and innovative methods for managing electronic resources is best given that electronic resources management transcends the traditional boundaries of library work roles and given that our collegial management structure facilitates such collaboration. This creative activity will enable us to better support our patrons in our daily work and participate more deliberately in discussions on issues ranging from the implementation of new educational technology on campus, to the creation of an institutional repository, to the identification of gifting opportunities for electronic

resources, to the implications of intellectual property and scholarly communication issues for electronic resources management, to joint efforts among libraries to make the systems we use for providing access to and managing electronic resources more effective.

Section 4 Assessment

We will employ a variety of assessment tools in order to determine how well we are meeting each of our goals. We have sought to integrate into our assessment plan direct or indirect input from those who have the most to gain from a successful electronic resources management program – students, faculty, and our colleagues at the library.

When appropriate, we will analyze data that the library is already gathering as part of its regular assessment activities. The electronic resources librarian and serials manager will be involved in gathering, interpreting, and making decisions based upon our assessment data. We will track our progress toward our goals in our electronic resources and serials annual reports.

- Library focus groups. The library regularly tracks a small group of students thorough four years at the college, and interviews them to assess their attitudes, experiences, and beliefs about the library and about their research needs and skills throughout their undergraduate program. We will gather data from focus group discussions that pertain to access and use of electronic resources.
- Website study. The library conducts periodic evaluations of the effectiveness of the library's website. These evaluations may include student surveys, focus groups, usability testing, and/or analysis of website usage statistics. We will gather data from these studies that pertain to access and use of electronic resources.
- Electronic resource usage statistics. We will gather usage statistics annually and use them to help us identify what is working well and what needs to be improved in terms of accessibility, content, organization, promotion, and usability of electronic resources.
- Library faculty survey. We will survey our reference librarians each year to solicit feedback regarding accessibility, usability, and content of our electronic resources based on their interactions with students in reference and instruction sessions and their collection development work with faculty in their liaison departments.
- Library faculty and staff survey. Every year, we will survey the library faculty and staff for input on how well our electronic resources management program is supporting them in their work.

- Workflow analysis. Every year, we will conduct a workflow analysis by reevaluating existing workflow practices or selecting a special project for which to analyze workflow. This will help us identify areas for improvement in our overall workflow and to be intentional, efficient and proactive with electronic resources management.
- Research and exploration report. Every year, we will prepare a report on our recent research and exploration in electronic resources management trends. This reporting mechanism will hold us accountable for exploring better, creative, and new ways of meeting our goals for effective electronic resources management.