On the Dublin Core front

by Norm Medeiros
Associate Librarian of the College
Haverford College
Haverford, PA

Fall Fare: The NISO ERM Forum

"Accessible information helps to dissolve the mystery surrounding the management of e-resources that exists in many libraries. The work of e-resources management must be seen as integral and mainstream rather than unusual. Improving communications about e-resources management can assist libraries and their staff members in making that transition."[1]

ABSTRACT
This article reviews the NISO E-Resource Management Forum held September 2007 in Denver, Colorado. The meeting brought together librarians, systems vendors, and serials agents to discuss issues surrounding electronic resource management systems (ERMS). Key topics included interoperability, staffing, and workflows.

KEYWORDS
electronic resource management systems ; ERMS ; interoperability ; staffing ; workflows

*I*n September 2007, the National Information Standards Organization (NISO) sponsored a forum on electronic resource management attended by 65 individuals representing libraries, serials agents, and system vendors. NISO's sponsorship of this event is in keeping with its interest in supporting work that revolves around ERMS, as there are standards opportunities within the framework of this still relatively young technology. Key topics included interoperability, staffing, and workflows, terms that were repeated by speakers and audience members alike during the two-day event.

INTEROPERABILITY

Interoperability has been discussed a lot lately. Earlier this month, Andrew Pace wrote an opinion piece on interoperability, claiming it is "the biggest lie in automation."[2] Pace noted, "Interoperable is, at best, an adjective for standards-based systems, and at worst, a hack to cover up the fact that different systems are not at all meant to speak to one another." Pace's cautionary words notwithstanding, interoperability is coveted among e-resource librarians, particularly as a means of moving data into ERMS. Angela Riggio (UCLA) and Jeff Aipperspach (Serials Solutions) discussed interoperability during a joint session at the forum. Riggio, speaking as an ERMS implementer and

member of the DLF ERMI2 Steering Committee, discussed elements deemed crucial to exchange between integrated library systems (ILS) and ERMS. Riggio noted specific interests for such interoperability, especially the need to combine cost and usage within an ERMS. Jeff Aipperspach, speaking from the systems perspective, considered a multi-vendor collaborative to establish such interoperability vital to all interests – a standards opportunity that would benefit libraries and vendors alike. A group of vendors (Serials Solutions, SirsiDynix, Ex Libris) has begun discussions about developing a core of acquisitions elements and a means by which these elements can be transmitted from the ILS into the ERMS, an effort informed by the work of Riggio and DLF ERMI2 Steering Committee colleagues who have been investigating the feasibility of such interoperability over the past year.

COST-PER-USE

Usage statistics, particularly of the COUNTER variety, provide libraries with a means by which to compare the use of electronic resources.   NISO Z39.93–2007, the Standardized Usage Statistics Harvesting Initiative (SUSHI) Protocol, supports automated ingestion of statistics in ERMS, where they can be combined with cost data to yield cost-per-use.   There exist serious hurdles, however, to meaningful generation of these metrics. First off, few publishers actually have SUSHI servers from which to feed usage data. Intermediaries are emerging to offer aggregated services in this regard, but they are costly and coverage is not exhaustive. A second challenge is the appropriation of cost at the item level. Given the way electronic resources are bundled, cost data at the constituent level isn't always available.   To counteract this bundle effect, a library may choose to review cost-per-use at the package level, or it may decide to split evenly the cost of a package across the component titles and calculate constituent cost-per-use in this way. Neither is a tidy solution. Moreover, there exists an additional challenge to generating meaningful cost-per-use data, namely how to reconcile that cost-per-use is calculated using an annual cost from which not all uses emanate; that is, some number of uses reported in a given year are from years prior to the one under review.[3]   Similarly, there will be uses of the current year's resource in subsequent years that will also render imprecise cost-per-use metrics into the future.

Cost-per-use is an important metric, but one that should not be viewed in isolation.[4]   As SUSHI capabilities are deployed in ERMS, additional criteria such as impact factor, faculty interest, and citation analysis should be fused into an overall decision support system.[5]

STAFFING & WORKFLOWS

The encouraging news on the interoperability front was tempered by the nearly ubiquitous lament of e-resource librarians that they are understaffed.   Irrespective of library size, it seemed all e-resource librarians I encountered at the forum were one-person units, handling most if not all aspects of the e-resource lifecycle. While print operations in these same libraries were seeing fewer resources moving through their workflows, staff were not being transferred to the electronic side of the shop. Presenters made clear that ERMS is not a panacea for helping e-resource librarians with their responsibilities; successful e-resource management is not so easily achieved.   It's taken several years for workflows to be of interest to the e-resource community. *Electronic Resource Management: Report of the DLF ERM Initiative* [6] provided guidance on workflows, but until recently this aspect of ERMI's work largely went unnoticed. Many attendees of the forum were eager to learn approaches to insinuating existing technical services staff into the e-resources workflow. Politics and staff resistance were cited as obstacles to such change.

CLOSING REMARKS

Additional comments were raised regarding the lack of a "best in class" ERMS, not to mention the challenge of building consensus among a group of staff as to the best ERMS to purchase. Since there is no clear leader in the marketplace, a number of local library factors play into the purchase decision. These factors can vary, but personnel is a major influence, as workflows developed around the ERMS will only be as effective as the staff performing them.

REFERENCES

1. Feather, Celeste (2007). "Electronic Resources Communications Management: A Strategy for Success." *Library Resources & Technical Services* 51, no. 3.

2. Pace, Andrew. "Interoperability is a Lie." Available: http://blogs.ala.org/pace.php?title=interoperability_is_a_lie_2&more=1&c=1&tb=1&pb=1 (Accessed 1 October 2007).

3. Jonas Holmstrom illustrates this problem in his *D-LIB Magazine* article "The Return on Investment in Electronic Journals," 10:4 (April 2004). Available: http://www.dlib.org/dlib/april04/holmstrom/04holmstrom.html (Accessed 14 September 2007).

4. See the California Digital Libraries' "The Promise of Value-based Journal Prices and Negotiation: A UC Report and View Forward" for a related approach to determining a resource's value. Available: http://libraries.universityofcalifornia.edu/cdc/valuebasedprices.pdf (Accessed: 24 September 2007).

5. Anderson, Caryn (2006). "Electronic Resource Usage Statistics: Defining a Complex Problem." Available: http://web.simmons.edu/~andersoc/erus/ERUSlandscape.doc (Accessed: 14 September 2007)

6. Jewell, Timothy D. et al., *Electronic Resource Management: Report of the DLF ERM Initiative* (Washington, DC: Digital Library Federation, 2004). Available: http://www.diglib.org/pubs/dlf102/ (Accessed: 17 July 2007)