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Reflections on Workflow Balance: Walking a Tightrope in the Transition to Electronic Resources

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REFLECTIONS ON WORKFLOW BALANCE

Walking a Tightrope in the Transition to Electronic Resources

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Has print become the exception rather than the rule in terms of resource formats in your library ?

Is your "Technical Services" department organized based on print formats as the rule?

If electronic formats have become more the rule than the exception, are staff trained for this reality?

Or are you still walking the tightrope in the transition from print to electronic resources?

Gradual Transition

- **Databases/Indexes**
  - In place of print indexes
  - More full text gradually included
- **Periodicals**
  - Full-text became the expectation
  - Massive cancellations of print often due more to budget than preference for e-journals in beginning
- **Books** (Reference & Regular Monographs)
  - E-book packages & gradual selection of individual titles in electronic format rather than in print
- **Government Documents**
  - GPO plans for 98% of new documents to be electronic

Changes in Workflow

- **Radical** – Reorganize & change everything all at once
- **Gradual** – Who could add this task? Who has time to do this new work that seems essential?
- **Not at All** – Will not work forever!

What is it that we can stop doing?

While transition to electronic resources occurs, work for print resources continues. As a result, staff must know how to do more!

More Focus on Managing Electronic Resources?

- Reorganize
- Retrain
- Redefine roles
- Reallocate staff

New Skills Are Necessary

- More knowledge of technology, especially library's own technology!
- More communication with outside departments
- More licensing & negotiating skills

Unless library can get additional staffing, must transition current staff into new ways of looking at resource management.

New Workflows Required

- Constant change will be ongoing.
- Basic changes in workflows are necessary.
- Staff should be involved in decisions & changes made.
- Training in how electronic resources life cycles differ from print.
- Much of the work is similar but done in a new way.

Why Re-Think Workflows?

- **Print Resources**
  - Physical objects
  - Linear process
  - Clear procedures
  - Set rules and policies

Why Re-Think Workflows?

- **Electronic Resources**
  - Intangible – Dealing with information about a resource such as a license agreement, proxy issues, url
  - More complex issues than print materials
  - Same procedures used for print do not work for electronic resources
  - Requires more people from different departments
  - Roles are nebulous

Trends in Staffing for Electronic Resources

- Librarians have tended to do most of the work related to managing electronic resources.
  - Can work be give to more to support staff?
  - Can we get additional staff?
  - Can we collapse some print functions?
  - Can we evolve job responsibilities?

Any way you look at it,
we are back to doing
more with less!

Reorganization Models*

- **Electronic Resources Department Model**
  - Difficult to sustain as collections grow
  - May eventually claim large portion of library
    - Acquisitions, cataloging, serials, collection development, reference, web-development, systems . . .
  - Stopgap for many libraries

  Managing the Transition from Print to Electronic Journals and Resources, 2008, p. 121-123.

Reorganization Models*

- **Integrated or Distributed Model**
  - Integrated into existing organizational structure
  - Adjustment is not easy
  - Requires training
  - Expand expertise to new format
  - Most realistic model

Managing the Transition from Print to Electronic Journals and Resources, 2008, p. 121-123.

Reorganization Models*

- **Hybrid Model**
  - Electronic resources managerial department or unit
  - Maintains distributed responsibilities across library
- **Incremental Reorganization**
  - Examine responsibilities and integrated into positions through attrition
  - Changes organization over time

Managing the Transition from Print to Electronic Journals and Resources, 2008, p. 121-123.

Tools for Managing Electronic Resources

- Catalog
- A-Z Lists
  - Evolved from home grown to SFX generated
- Link Resolvers
  - SFX & others
- MARC Record Services
  - MARCit
- ERM Systems
- URM – Unified Resource Management

What Can the ERM Do?

- Facilitate Management of License Agreements
  - Brief public display
- Facilitate Management of Workflow
  - Ticklers
  - Reminders for tasks through life cycle
- Facilitate Report Production
- Facilitate Production of Usage Statistics
- Facilitate Collection Evaluation
  - Management of Trials
  - Collection Analysis & Statistics

What Can the ERM Do?

- Facilitate Acquisitions
  - Purchase Orders
- Facilitate Cataloging
  - Brief Records
  - Record Management
- Facilitates Public Search Tools
  - Library Subject Pages
  - Library A-Z List
  - Library Database List

What Can the ERM Do?*

- Facilitate Administrative Tasks
  - Security
  - User profiles for access
  - Problem logs
  - Technical contacts
  - Authentication & registration

  Managing the Transition from Print to Electronic Journals and Resources, 2008, p. 192.

Implications of ERM for Library Staffing

- Integrated rather than "added on"
- Involves staff from all departments
  - Systems to maintain & customize
  - Staff to populate & work with system means shift in responsibilities
- Requires consistent standards for local practice

URM
Universal Resource Management

- ▣ Merging of ERM and LMS for managing all library resources
- ▣ Vendors working on product
- ▣ Not on market yet

JISC & SCONUL LMS Study Report , Mar. 2008