

What You Need to Know About Moving Collections and Acquisitions Into An E-Dominant Model!

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What You Need to Know About Moving Collections and Acquisitions Into an E-Dominant Model!

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Abstract

Two different University of Maryland Libraries discuss how they have moved to an e-dominant model, the reasons why, and the new acquisitions strategies libraries can use in crafting an e-dominant collection. Whether your organization is a large ARL library like University of Maryland, College Park (UMD) Libraries or a nontraditional online library like the University of Maryland University College (UMUC) Library, there are many strategies for taking advantage of the new acquisitions environment and rethinking how to build collections in an e-dominant world. At UMD, adopting an e-dominant model has been a gradual change over time, allowing the library staff to develop new ideas about collection development and experiment with new tools and techniques for acquiring and managing the libraries' collection. As these changes have unfolded over time, staff began to develop a more comprehensive and holistic picture, becoming more aware of how their own work with e-resources impacts our colleagues, our patrons, and the wider library community. At the UMUC Library, the electronic resources management staff developed an e-model initiative that represents a fundamental shift for electronic resources management at UMUC. Electronic resources have become a critical, important, and fully integrated component in course development for the university and this is driving the direction of collection development for the Library. The main thrust of this shift has been the establishment of an E-Resources Initiative to replace the use of textbooks in print with e-resources, primarily open access, embedded within the learning management system (LMS) course modules.

Introduction

As more libraries move to an electronic model (e-model) for their collections, two libraries in the University System of Maryland and Affiliated Institutions (USMAI) consortium planned out their own approaches to this process: the University of Maryland, College Park (UMD) and the University of Maryland University College (UMUC). Planning for the change in processes at the two libraries emerged over time, as e-resources began to develop as the primary means of access for our patrons. The change in processes was dependent on the infrastructure and environmental influences within their libraries and at their institutions as a whole. Both also shared e-resources provided by several organized consortial organizations in Maryland and in the Washington, DC area. As will be discussed, while these two libraries have different foundations and stances on their paths to an e-dominant model, commonalities do emerge. The basic premises of

their approaches can help the UMD and UMUC librarians understand and share what they are doing at their institutions and learn from their experiences, ultimately enabling both to continue to develop improvements, effectively enhancing access to and management of their e-resources.

University of Maryland, College Park Libraries

Moving to an e-dominant model for collections means rethinking how our patrons use the collections we have, and more importantly, how they wish to use the collections we don't already own. Many have argued that in order to make this shift, libraries must overcome the traditional idea of building collections, particularly print collections, moving from a just-in-case model to a just-in-time model of offering materials at the point of patron need (Lehman, 2014). We argue that new acquisitions models like demand-driven purchasing, enhanced by network level discovery

and the unbundling of scholarly content, are in fact the culmination of the traditional model of collections—one in which the library can finally achieve the hallowed goal of offering our patrons any material in the world, and all at the click of a button. But to do this well, the catch is to understand we are no longer in the business of building and managing collections. Instead we are managing collections services, and specifically a core suite of services that provide instantaneous access to anything, anywhere, and at any time. The success of that model is the degree to which any library can coordinate the work to be done in fulfilling those services, not only across its own organization and staff, but also out into the marketplace working with external vendors and cooperative partners (Dempsey et al., 2014).

At the University of Maryland Libraries, we recently underwent an organizational change, moving those departments that traditionally encompass collection development and technical services under one administrative division entitled Collection Strategies and Services. The close association between collection development and the support of collections that these traditional units provide is now seen as one coordinated service, or rather a suite of services. We have learned through our experiments with demand-driven acquisitions and the development of discovery tools that our goal must be to offer our patrons the best services we can to not only find what we already own, but also to find, access, purchase, or borrow anything else in the world of scholarly information they may need. That's a big job, and not one that any unit within a library can do by itself. Nor for that matter can the library do it without some significant help from our partners in the marketplace, including consortia, enterprise level system providers, book vendors, content providers, knowledge base companies, subscription agents, networked metadata providers, and so on.

The real key to moving to this kind of e-dominant collections model understands the difference between developing collections versus developing coherent collections' services across the entire marketplace. We no longer simply develop collections or acquire materials. Instead we might

manage the selection profile that pushes demand-driven books appropriate for our libraries' focus into the pool of available books for our patrons to see and potentially use. Or we might manage the metadata profile for potential collections, working with our vendors and content providers to ensure their materials are discoverable through our knowledgebase provider, even though we may never own the material. Or we might work with our vendors to negotiate the right to convert their original content into another format, offering streaming video to students who would rather watch a film for class from anywhere via the course reserves content management system than physically visit the media services library. Or we might negotiate access to a provider's content that would allow a faculty member to perform data mining research. Or we might work with our IT unit and our Interlibrary Loan Unit to develop a "buy or borrow" option, allowing our patrons to generate a request for nonowned content in the same way they currently do for ILL. This is a wholly different view of collections, and one that takes a larger amount of coordination between library staff than the traditional collections model.

It will come as no surprise that as a direct result of our experiences with developing and managing some of the new collections services we now provide, the staff working across the libraries have gained a healthy appreciation of what each of us does to support those services, and just how difficult the decisions are that we must make in this new environment. The work has been slow going at times, and has involved a lot of rethinking what we do and how we do it. Like many libraries, we're struggling to rethink our physical spaces. The largest challenge in this area is the disconnect between what some of our patrons, and even some of our own subject librarians, want us to preserve (physical books in a branch library that are rarely used) with what others desperately need us to develop (space for collaboration, makerspaces, learning and research commons, big data set repository). And again like almost every other library we know, we also struggle with our budgetary constraints. Do we continue to fund that "big deal" for journals from publisher X? And if we do, what are the opportunity costs we've lost in not repurposing those funds to develop an

on demand article service that might ironically offer our patrons access to more content? And when it comes to selection and acquisition, our two greatest challenges continue to be 1) understanding the new role of selection and acquisition expertise in developing and evaluating new models for collections, and 2) developing both the internal and external infrastructure needed to support robust discovery and fulfillment services for the collections we want to offer. Anyone who has faced the wrath of a patron who does not understand why they cannot immediately access anything from anywhere at any time will understand what we mean here. Or the shock of finding out the knowledge base provider updated its global content over the weekend and overwrote our local data for certain publishers or local collections, followed quickly by the dawning panic that we have no really good way to notify our patrons that those links won't work for a bit while our external business partner quickly tries to fix it. The bar of expectation has been set high by the retail marketplace of content providers and fulfillment services (iTunes, Netflix, or any other commercial on-demand service) that can offer efficient and immediate consumption of content to our patrons. Our job has become figuring out how to connect the content sold in the library marketplace with our patrons in that same seamless and immediate fashion.

University of Maryland University College Library

UMUC was established as a distance education institution when originally founded in 1947, and continues today as one of the largest provider of online learning in the United States. Initially the UMUC Library provided resources mainly in print and then, about 20 years ago, switched gradually to electronic as this type of format became more readily available. There were UMUC libraries in Asia and Europe with more substantial print materials; these closed around 2007, primarily due to changes in locations of US bases. In 2013, the physical facility of the Library in the UMUC headquarters closed, albeit with a small volume of print materials, and the Library has been completely virtual since then.

It was a natural process for the UMUC Library to focus strictly on electronic materials. Our students and faculty are located worldwide, and access to a physical library is not always possible, especially to our patrons down range on bases and other military installations. As a result, the e-model for the Library was initiated very early on, more as a matter of necessity and unwittingly as a provider of e-resources using a model that all libraries are now developing according to their institutional requirements. In that sense, the UMUC Library represents the very end of the spectrum of an e-dominant model: the "only" e-model, with no focus on print collections, except to provide books in print from the USMAI institutions, on a lending basis to our students within the contiguous United States.

Management of electronic resources started out in 2001 with one part-time librarian, and in 2013 a library associate was hired to help with the increasing workload. The management of electronic resources is not a traditional career in the UMUC Library, since it is a new and burgeoning field, and this work has led the staff to carve out new pathways both beneficial for the Library and for the potential management of electronic resources at UMUC as a whole. In addition, the unique academic environment at UMUC has provided an even greater opportunity for innovation.

While the ERM Unit is modeled after a more traditional, but changing, technical services unit at an academic library, the workflows have not been traditional. The UMUC Library fully supports the acquisition, evaluation, and operations for ERM, but does not focus on cataloging. In fact, we do very little cataloging here for our electronic resources, instead focusing on access through our discovery tool, EBSCO Discovery Services (EDS). Even in EDS though, we do not load in our relatively small number of catalog records. Most of our students and faculty are located through the world and a library catalog that includes print materials that they cannot access nor borrow is not useful for them. In addition, the nontraditional environment has enabled the staff to think in very different ways of how to establish effective ERM workflows and overall operations,

with a small number of personnel to manage all of it. The Core Competencies for Electronic Resources Librarians (http://www.nasig.org/site_page.cfm?pk_association_webpage_menu=310&pk_association_webpage=1225) serves as a basis for our work, especially for the life cycle of electronic resources, research and assessment, and effective communications. However, the trends for ERM at UMUC present many other challenges and we are faced with both understanding these trends and adapting to them in very different ways than we see at other academic libraries.

Adaptation is important for ERM at UMUC in order to prove relevancy of our subscribed resources. We need to reach out to our faculty in order to understand, explore, and participate in high-priority projects, such as analytics, to identify the most important learner interventions and new adaptive learning techniques. The ultimate goal is for our student success and retention of those students in their chose track of learning.

The main thrust of these changes have been the establishment of an E-Resources Initiative to replace the use of textbooks in print with e-resources, primarily open access, although we are seeing more of a trend of late of utilizing the Library's proprietary electronic resources as a means of directly supporting required course reading, embedded within the learning management system (LMS) course modules. This may seem to be similar to what is occurring in online academic courses at many other institutions, but there is a fundamental shift in ERM here at UMUC that is unique. Electronic resources are acquired not only by the Library, but by UMUC as a whole, and further have become a critical, important, and integrated component in course development. Electronic resources collection development is no longer limited to the library; many other departments have become involved at this very beginning stage and will continue to do so, with the expertise and help from the UMUC Library staff.

The E-Resources Initiative is part of a larger initiative now, Competency-Based Education (CBE), which is primarily defined by identifying competencies in program and providing students

with the means to prove those competencies as they progress towards the goal of obtaining their degrees. As a result of the ongoing competency-based education initiative, the E-Resources Initiative is evolving into the Online Learning Resources (OLRs) initiative. OLRs can be articles, e-books, videos, websites, and open access resources, as well as Library-subscribed resources. The word electronic does not necessarily define their inclusion; that is set by the importance of the resource for any given program. OLRs will mean a different view of licensing, access, linking, and analysis of their usage that we are just beginning to envision for ERM at UMUC.

There are four initiatives to develop and improve the e-model workflow for the UMUC Library and the entire university. All of these are intentionally reaching out beyond the Library's own systems to explore and develop the use of electronic resources within an innovative environment of online learning that ultimately supports our students' success and leads to improve retention within the various programs.

1. Utilizing existing content management systems that are integrated with our learning management system (LMS) for electronic resources management. We are thinking that using the same systems that are used for course management, instead of ERM systems built specifically for libraries, is the future of ERM at UMUC. The system we will work with is Equella, which will enable us to enter in important metadata about our resources, and track usage.
2. Working on how to improve access to electronic resources by better understanding both curricular needs and how students gain and organize their access to electronic resources. I am aiming to tie all of this into how our LMS is utilized by students and faculty in order to understand and develop a fully integrated ERMS with our LMS.
3. Developing a project to enable improved access to electronic resources within a Competency-Based Educational system. The ultimate goals are to initiate valuable

assessment of the use of electronic resources and how these resources can develop to track and aide in the educational process within this type of environment.

4. Developing a philosophical approach to learning with electronic resources, based on the Extended Mind theory proposed in 1998 (Clark & Chalmers). Pursuing the best intentions of this theory will lead the Library staff to a better understanding of how our students organize their environment to access electronic resources. This will help us develop improved means of setting up access for them.

Conclusions

At both UMD and UMUC, acquisition and collection development librarians find that shifting models for managing e-resources has fundamentally changed their role in managing library collections. Rather than build a collection, we now coordinate collection options for our users, from building to coordinating, sometimes in a rapidly changing environment. This change has meant a shift in focus from a more centric approach to a broader, patron-focused approach. While each library arrived at this approach for different reasons, the resulting goal for both libraries has been improving access for our patrons and experimenting with the best means to achieve that goal.

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