Outline/ Learning Outcomes

• Understanding E-resources (e-books, e-journals, etc).
• Collection development policies & E-resources.
• Selection of Digital Information Resources.
• Acquisition and Licensing of E-resources.
• Challenges of collection development in the digital era.
• Dual collection development (Print vs Electronic).
An Introduction

• In recent years traditional formats for information, such as books and microfilm, have increasingly been supplemented by information which is accessible electronically through the use of computer technology.

• This means then that the existing collection development policy for a library must include selection criteria and collection parameters covering these new media formats (i.e. e-resources).
Understanding Electronic Resources

• **E-resources**: refer to those materials that require computer access, whether through a personal computer, mainframe, or handheld mobile devices (Johnson et. al., 2012).

• They may either be accessed remotely via the internet or locally.

• Example: E-journal, E-books, E-images, numeric and statistical databases, etc.
CDP & E-Resources

• While traditional collection development criteria, such as subject, level, and target audience apply to the selection of most e-resources, the management of the electronic format is more complex and, as such, it is a good practice to develop a supplementary policy which addresses specific format related issues.

• Such a policy should be used in conjunction with the more traditional collection development policy and not in isolation.
The policy should provide guidance to assist selectors or acquisition librarians in establishing the library’s expectations and preferences in relation (but not limited) to:

- Technical Feasibility
- Functionality & Reliability
- Vendor
- Supply
- Licensing
Technical feasibility

This includes, but is not limited to:

• **Availability**, e.g., remote access, stand-alone access.

• **Authentication**, e.g., IP [Internet Protocol] filtering or login password.

• **Hardware and software** compatibility and capability.

• **Storage and maintenance**, e.g., remote hosting v. local hosting.

• **Platforms** which facilitate access to e-resources.
Functionality and reliability

This includes but not limited to:

• **Search and retrieval functionality**, e.g., truncation, browsing, search history, transliteration.

• **Exporting and downloading**, e.g., printing, e-mail, downloading to a machine, and downloading to an electronic device.

• **Sorting and ranking abilities** for database results. For example: author, title, date, relevancy, facets, etc.

• **Interface**, e.g., system intuitiveness, navigation, help and tutorials.

• **Integration**.

• **Reliability and availability**, e.g., response times, 24/7 access.
SELECTION OF E-RESOURCES

• E-resources present a number of hurdles not encountered with traditional library materials.

• To ensure consistency of approach, it is good practice to establish clear guidelines and processes for the selection of e-resources.

• These might include developing a checklist for selection.
Selection of E-resources

- Such a checklist might include specific rules regarding:
  1. Content
  2. Technical requirement
  3. Functionality and reliability
  4. Vendor support
  5. Supply
1. Content

Selection of E-resources

• Initially e-resources need to be reviewed and evaluated for selection from a content perspective against the same policies, guidelines and criteria that apply to print resources.

• Once the main selection criteria have been met, then a number of additional content criteria, unique to e-resources, need to be considered.
1. Content

Selection of E-resources

• These include:
  • the consistency of the electronic publication with any print equivalent.
  • the currency of the online content and frequency of updates.
  • the availability of back issues, archiving, and the added value of the e-resource over other formats.
  • pricing.
2. Technical requirements

Evaluation should be in consultation with the appropriate technical staff and should include consideration of the following:

• **Method of Access** – What methods of access are available (e.g., stand-alone, remote via Web, local Web mount or hosting)?
  
  • Access to remote hosts via Web is often preferable because it provides additional benefits such as faster updating, optimum access, reduced burden in terms of storage, preservation and maintenance.
2. Technical requirements

- **Authentication** – What methods of authentication are available (e.g., IP filtering, login and password)?
  
  • Access via IP filtering is often preferable because it typically provides simultaneous access for multiple users.
  
  • IP-address recognition can be used to provide access to authorized library users to access content from outside the physical confines of the library.
2. Technical requirements

Selection of E-resources

• **Compatibility** – The resource should be compatible across a range of platforms and, where local installation and maintenance are required, should be compatible with existing hardware and software supported by the library.

• The selector should also determine if the e-resource requires any special hardware, software, multimedia, and/or audio capabilities.

• Where this is the case, consideration needs to be given to the additional cost of acquiring, installing and supporting the appropriate software or multimedia components.
3. Functionality & reliability

- **Interface** – The e-resource interface should be user-friendly, easy to navigate and intuitive.

- User-friendly resources often include such features as:
  - online tutorials, introductory screens, navigation aids and context-sensitive help and personalization options such as subscribing to feeds/e-mail alerts, save search history etc.
3. Functionality & reliability

- The screen design should be easy to read and follow and consideration should be given to the similarity of the resource interface to others already in use by users.
- Multi-lingual interfaces are desirable for libraries with a multi-lingual community.
- **Search and retrieval**
- **Exporting and downloading**
- **Responds reliability and availability**
- **Integration**
4. Vendor support

- **Trial evaluation and product demonstration** – It is preferable for the resource to be available for trial and for the vendor to provide, if required, product demonstrations. Trials are particularly useful in supporting the evaluation process of a product in terms of technical issues and functionality and reliability.

- **User training and support**

- **Technical/customer support and system notification processes**

- **Customization**

- **Data archiving**

- **Bibliographic data provision**
• When it comes to e-resources, especially in this digital era, acquisition is much more an issue of obtaining license to use databases of e-books or e-journals – for example, rather than obtaining a physical or tangible material.

• In this regard, the subsequent section focuses on some pertinent issues to consider when obtaining the license (acquiring an e-resource).
Licensing Considerations for E-Resources (1)

- Unlike print publications, e-resources are not purchased outright and usually require a license agreement to be in place.
- Prior to purchase, the license must be reviewed and negotiated to inform and support the evaluation process, and to ensure that it reflects the selector's expectation.
- It is preferable to obtain, where possible, a standard model license agreement that describes the rights of the library in easy-to-understand and explicit language.
Licensing Considerations...

Some of the licensing considerations include, but not limited to:

1. Access concerns.
2. Use of the electronic information resource.
3. Vendor support and technical considerations.
4. Flexibility and enhancements.
5. Legal issues.
1. Access concerns

- It is recommended practice that the following points governing access by a library’s patrons must be included in any licensing agreement which a library, its governing institution, or its consortium signs:
  - Authorized users
  - Authorized sites
  - Method of Access
  - Archiving policy and perpetual access
1. Access concerns

**Authorised Users** are all persons with a current, authenticated affiliation with the subscribing institution(s).

- This could include full- and part-time students and employees (faculty, staff, affiliated and visiting researchers and independent contractors).

- Visitors who have permission to use the institution’s publicly available computers should have access to the licensed resource. This is commonly known as „walk-in use.}
1. Access concerns

*Authorised Sites* should include all sites including satellite facilities in different geographic locations.

• Authorized users should also have access to the licensed resource from home, offices or any other remote location, through the use of IP-authenticated protocol as provided by the subscribing institution.
1. Access concerns

**Method of access**

Access should be permitted via IP authentication for the entire institution(s), including simultaneous access for multiple users, in different geographic locations, and sites.
1. Access concerns

Archiving policy and perpetual access
The resource provider should present a clearly articulated archiving policy for the information being licensed.

• The resource provider should have an arrangement with LOCKSS, Portico, or other similar types of archival products, or with an open source compliant archiving system.
2. Use of the electronic info. resource.

- The license should permit fair use (fair dealing, etc.) of all information for educational, instructional non-commercial and research purposes.
2. Use of the electronic info. resource.

- The following considerations regarding fair use, user statistics and liability for unauthorized use should be addressed in any licensing agreement which a library, its governing institution, or its consortium signs:
  - Interlibrary loan
  - Pay-per-view
  - Viewing, downloading and printing
  - User Statistics
  - Liability for unauthorized use
  - Privacy and Confidentiality of User information
3. Vendor support and technical considerations.

- The following vendor support and technical considerations should be addressed in any licensing agreement which a library, its governing institution, or its consortium signs:
  - Content consistency
  - Bibliographic data
  - Commencement data
  - Technical Support
4. Flexibility & Enhancements.

- The following considerations should be addressed in any licensing agreement which a library, its governing institution, or its consortium signs:
  - Cancellations
  - Consistency with print equivalent
  - Availability
  - Drop-out clause
5. Legal Issues

• The following legal issues should be addressed in any licensing agreement which a library, its governing institution, or its consortium signs.

• It is generally advisable that the library or consortium consult with its legal counsel before any major license agreements are signed, if such review is not already legally or procedurally mandated at the institutional level.
5. Legal Issues

- Terms of payment
- Grace period
- Resource providers authority to provide access
- Language of licence agreement
REVIEW AND RENEWAL PROCESS

• Given the rapidly changing nature of technology, the emergence of new offerings from information providers in terms of the pricing and packaging of content, and continued pressure on library budgets, it is essential that libraries regularly review their e-resources to ensure they continue to be relevant and provide demonstrable value for money.
Review and renewal process

• Like other continuing resources, e-resources will not always have a uniform renewal date, as subscriptions or leases may run for one or more years from any particular date on the calendar.

• The library should ensure that as part of the license agreement, the vendor is required to provide sufficient advance notification in relation to renewals to allow for sufficient lead time to undertake an effective review of the resource.

• This is particularly important if the library has a large number of significant renewals due on or around the same time.
Review and renewal process

**Review of usage data:** When making decisions concerning renewals, the usage statistic should be helpful in determining:

- If the resource continues to be relevant to lib. users.
- Usage trends in specific areas – Is usage increasing or decreasing as compared to previous years or in comparison to other products in a similar area.
- How the resource compares to other resources in terms of cost per use.
- If other options for access might be more cost effective (e.g., pay per view, selected content vs. package deal).
- If the number of simultaneous users is set at the appropriate level.
Review and renewal process

In reviewing any continuing e-resource, consideration should be given to issues including, but not limited to:

• Changes to information provider.
• Changes in operating platform.
• Changes in access provision.
• Changes to pricing.
• Changes to the license.
• Changes to packaging/content available.
Opportunities & Advantages of E-resources

- Allows multiple and simultaneous access
- They are easily updated
- Advance search tool
- Most e-resources support remote access, which allows users to access the libraries collection from any part of the globe.
Challenges & Problems of E-resources

- Problems of user-friendly environment
- Problems of user training
- Problems of Digital Divide
- Change resistance from staff and users
- Challenges regarding Technological Upgradation
- Challenges regarding IT skill Manpower
The Print Media

• Despite the disadvantages that may be associated to the print media in the face of e-resources, it has some advantages over its electronic counterpart.

• This may depend on who the targeted audience is and what message is being conveyed, among other things.
Advantages of the Print Media

• No Technology is Required: Older citizens are less technologically savvy than younger generations. Print media is still the preferred media source for many individuals who cannot or do not want to work with current technology or do not have access to technological items.

• Some health implications that may come
Advantages of the Print Media

• **Low Initial Cost:**
  While you will save money over time using these technologies, the initial cost of print media items tends to be much lower.

• **Printed Materials are not as fragile as with e-resources:**
  the items are not so desirable to thieves. If you leave your book behind on an airplane seat, you're out less than $20 versus $200 for your e-reader and all the books you had downloaded onto it.
Advantages of the Print Media over E-resources

• The permanency of electronic information seems more fragile and librarians need to take an active role in establishing procedures and policies regarding the permanent archiving of electronic files.
DUAL COLLECTIONS

• Print and electronic One of the major problems that must be addressed in the new information environment will be an appropriate choice for what will be the chief characteristic of the information object.

• Will it be print or will it be digital? Will it be both?
• librarians, when planning to purchase or make available an electronic resource, should compare traditional and electronic forms of a resource in terms of cost-effectiveness and anticipated usage.
In terms of cost, questions may be raised such as:

• which medium costs more?
• Can the initial purchase be overlooked in consideration of potential long-term benefits?
• Which resource will be more cost effective in the long run?
• Ongoing costs such as subscription and maintenance must be examined carefully.
In terms of usage, the following questions may also be raised:

• Which is easier to use?
• Which will be offered to the majority of patrons?
• What is the potential for use?
• Is there a demand for this type of resource?
Conclusion

• By following established guidelines for ongoing evaluation and review against the library’s e-resource collection development policy;
  • the library should be able to ensure that library budgets continue to be spent on resources that support the mission and objectives of the institution and remain relevant and cost effective.
References


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