White Paper

Endeavor Information Systems Incorporated

How the University of Pittsburgh Libraries are Solving Their Electronic Resource Management Challenges

Library Administrator Sees Endeavor Meridian as Key to e-Resource Management Efficiency and Better Decision Making

Background and Perspective on Electronic Resource Management

Library administrators are well aware of the expectations of today's library patrons – reliable, remote, around-the-clock access to library resources. Industry research illustrates how these expectations have translated into major increases in electronic resource investments over the past several years.

According to the ARL Supplementary Statistics 2002-03, the average library budget allocated to e-resources has increased eightfold in the past decade, from 3.6 percent in 1992-1993 to 25 percent in the current report. The same report indicates that most ARL libraries are spending just under $2 million on electronic resources annually, the 10th consecutive year in which e-resource spending has increased at twice the rate of other library materials expenditures.

Although they can obtain more electronic content for less than the cost of printed material, countless academic libraries are struggling with labor-related and logistical issues when attempting to properly manage their electronic resources. In a 2002 survey, researchers concluded that in most cases, staffing for electronic resource management only doubled while collections increased tenfold in the same time period (Duranceau, Serials Review 2002; 28:316-320). Even if a library has recently added more staff to help address e-resource needs, it is more than likely that they are still understaffed in this area.

Compounding the issues of inadequate staffing, libraries often lack the tools necessary to manage the special processing requirements associated with e-content. Currently, most e-resource librarians are using stand-alone spreadsheets or simple databases along with paper files to manage the complex information about license agreements, payments, providers, access details and lifecycle processes. With tens of thousands of e-resources, hundreds of licenses and millions of dollars to control, such systems are ultimately insufficient for managing the library's electronic content investment.

The following case study describes one library administrator's approach to electronic resource management – Rush G. Miller, Hillman University Librarian and University Library System Director at the University of Pittsburgh.

Case Study: e-Resource Management at the University of Pittsburgh's Library System

The Environment

The University Library System (ULS) at the University of Pittsburgh includes 20 libraries across five campuses in western Pennsylvania. Collections held within the University of Pittsburgh total nearly five million volumes and more than 57,000 periodical subscriptions. The ULS has an extensive and fast-growing collection of electronic resources. In fact, the ULS spent more than 40% of its library materials budget, or $4.6 million, on electronic content in 2002-03.

The Situation

Logistical management of the ULS' electronic resources has been a complex and increasingly difficult task, according to Rush G. Miller, Hillman University Librarian and Pittsburgh's University Library System Director.

With thousands of electronic assets to control and multiple libraries and partner libraries to deliver access to, Miller has quickly recognized the need for more efficient workflows and better communication across libraries. "There is a huge amount of work in negotiating license rights to electronic resources, ensuring that patrons have reliable access to the information they need, and evaluating new resources, renewals, and e-journal cancellations. Our situation is even more complex given that the people and real-time information that's needed to administer e-resources are scattered across five campuses."

The Staff Investment

Although the ULS' Head of Technical Services was initially assigned responsibility for electronic resources, key tasks were also delegated to staff in a number of different library departments to manage the significant workload. Even with the expanded support team, Miller commented that the Head of Technical Services still devoted an average of 15 percent of each work day to e-resource management. He added that it "would be safe to estimate that overall, everyone on staff having a hand in managing e-resources devote about 4,000 hours per year to the task."

This large time investment was often due to the fact that the information needed to support decisions and take necessary actions was not readily available. Information lived in multiple places – in filing cabinets, email inboxes, spreadsheets and databases. "A system where all your license agreements are tucked away in someone's file cabinet is hardly a system at all," said Miller. And, unlike print content, where decisions are much simpler, dealing with e-resources and the packages through which they are acquired involves continual review, evaluation and monitoring.

What was missing, he contended, was a system to bring all e-resource information into one spot so it could be easily managed and communicated across the library. "I needed to enable my staff, say, two months from now, to see which electronic resources would be up for renewal four months from now, thus giving them an advance alert and the time they needed to properly evaluate an e-journal or database, long before the renewal needed to be ordered."

Without mechanisms in place to support these and other management activities, Miller's staff spent countless hours hunting for necessary access, acquisitions, and license details– hours that could have been allocated to other library initiatives.

License Compliance Concerns

With a manual process and "file cabinets full of license agreements – some in Tech Services, some in our Administrative Offices, some elsewhere," Miller worried about the ULS' ability to understand and enforce contract terms and the consequences to the University if the library failed, through oversight, to comply with license terms.

Because the library lacked a comprehensive electronic resource management system, Miller and his colleagues constantly worried about violating the complicated – and varied – terms of use expressed in content providers' license agreements. Library staff could not easily access information on which resources were governed by certain restrictions – interlibrary-loan provisions, limitations on remote or walk-in use, and so on. Only with an online, searchable database of information about its resources could the University of Pittsburgh staff, faculty, and patrons know what rules governed the use of various collections.

Selecting the Right Technology Partner

Faced with all of these challenges, Miller and his staff realized the need for a centralized electronic resource management system. It would need to not only streamline workflows and help ensure attention to critical activities, but also increase patron satisfaction with library services. Miller noted that patron surveys, focus groups and other feedback mechanisms employed suggest that users "have very high expectations for 24x7 access to all our e-resources regardless of where they are working, be it on campus, in their homes or in the field doing research."

As a solution, the University Library System approached Endeavor Information Systems, a leading provider of advanced library management software, on becoming a library development partner for Endeavor Meridian – an electronic resource management software system that the company had in the works.

"We had been thinking about the need for a system to manage electronic resources for some time, even considering building our own," says Miller.

"In a conversation with Endeavor CEO Roland Dietz at ALA two years ago, I mentioned this need and was pleased to learn that the company had such a system under development. I inquired about becoming a development partner to insure that any such system was designed in such a way that it would meet Pitt's needs. After all, we had given our requirements and needs considerable thought. Thankfully, Roland was happy to accommodate us. We became very heavily involved with the development team. This partnership produced a product that works for us and other large libraries."

During the development partner relationship, Endeavor planned, developed, and tested Endeavor Meridian with the staff responsible for managing the University of Pittsburgh Libraries electronic collections. Currently, the University is deploying the system prior to full-scale production.

Taking Control of e-Resources with Meridian

According to Miller, Endeavor Meridian is proving to be a much more comprehensive solution than was originally envisioned. Not only does Meridian support the administration of hundreds of packages through which Pitt acquires electronic resources and the licenses controlling their use, but is serves as a single source for e-resource management information, from initial trial evaluations through selection, license negotiation and access management.

Integration with ILS

Bolstering the ULS' confidence in and satisfaction with Meridian is the knowledge that it dynamically integrates with Endeavor's Voyager ILS to present bibliographic, holdings and acquisitions data. Meridian is a stand-alone system and was designed to integrate with other ILS products as well. Now, for the first time, library staff members have access to complete information about the e-resource landscape, including important information about resource descriptions, holdings, order status and payment information.

Improved Decision-Making Ability

Another Meridian component already showing its value across all campuses is the system's reporting features. "Among the people suffering are administrators who don't have the right data to make decisions," says Miller of libraries without an electronic resource management system.

With Meridian, the ULS now has the ability to regularly analyze its electronic collections and activities. As collections continue to grow, Miller says, it becomes increasingly important to track and monitor resource usage and expenditures with reporting.

Moving Forward with Meridian

The bottom line for Miller is that the process of deploying the Meridian system is helping to consolidate and add efficiency to much of the work associated with the logistical management of electronic resources.

He feels that as Meridian evolves, it will present Pitt's library system "with many opportunities to manage our electronic resources in more efficient, more effective ways that comply with licenses."

In terms of actual net savings, Miller says the new cost efficiencies "will be in the time formerly taken up by our first-line troubleshooters. That could be time devoted to doing troubleshooting they cannot do now or, sending enough information on to administrators, so the latter's time is spent more effectively."

He firmly believes that if any library system can take work that was done by four or five people collectively before, then integrate it into a system that manages the work for you, the cost can be justified over time.

"Removing all the old manual steps was the key for us, and Endeavor listened to our needs in streamlining workflows and increasing efficiency. The Meridian development process was quite positive for us, because we were right alongside Endeavor as it shaped and refined the product. As we continue to deploy it, we're finding Meridian to be a great improvement over our previous processes."