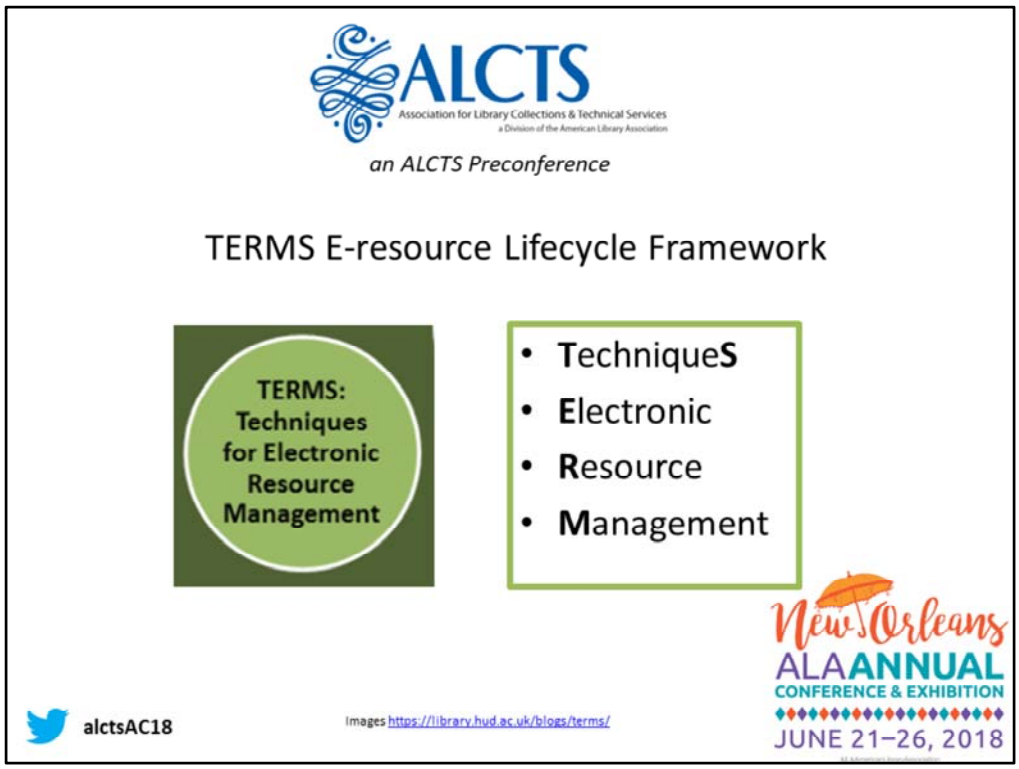
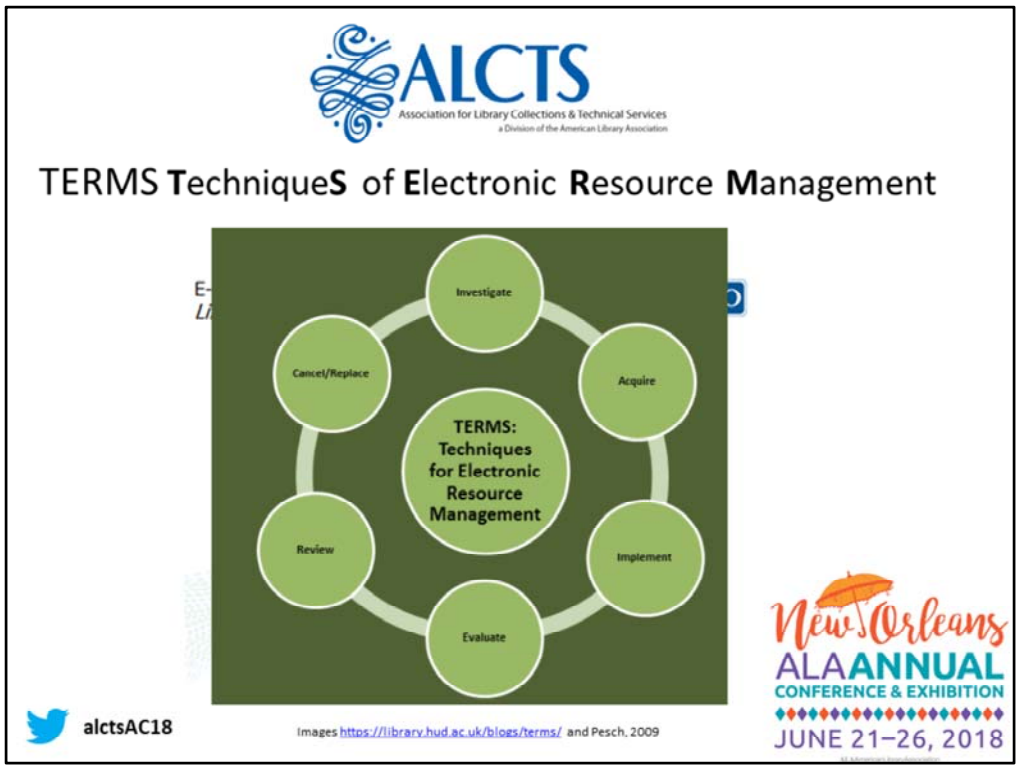


Show of hands for those familiar with the TERMS Project?

The acronym (aka TERMS6) stands for techniques of electronic resource management. We're using this framework today to illustrate how acquisitions work has changed in ways that rely more heavily on technology, new skills, and workflow tools. Most of this change has been as a result of increasing acquisition of electronic resources, although some of the tools are useful for acquisitions work regardless of a specific content format. I'm going to introduce how this model developed, highlight some examples of its application in library practice, and show how technology can support these techniques in acquisitions work, and how it will frame our work this afternoon.

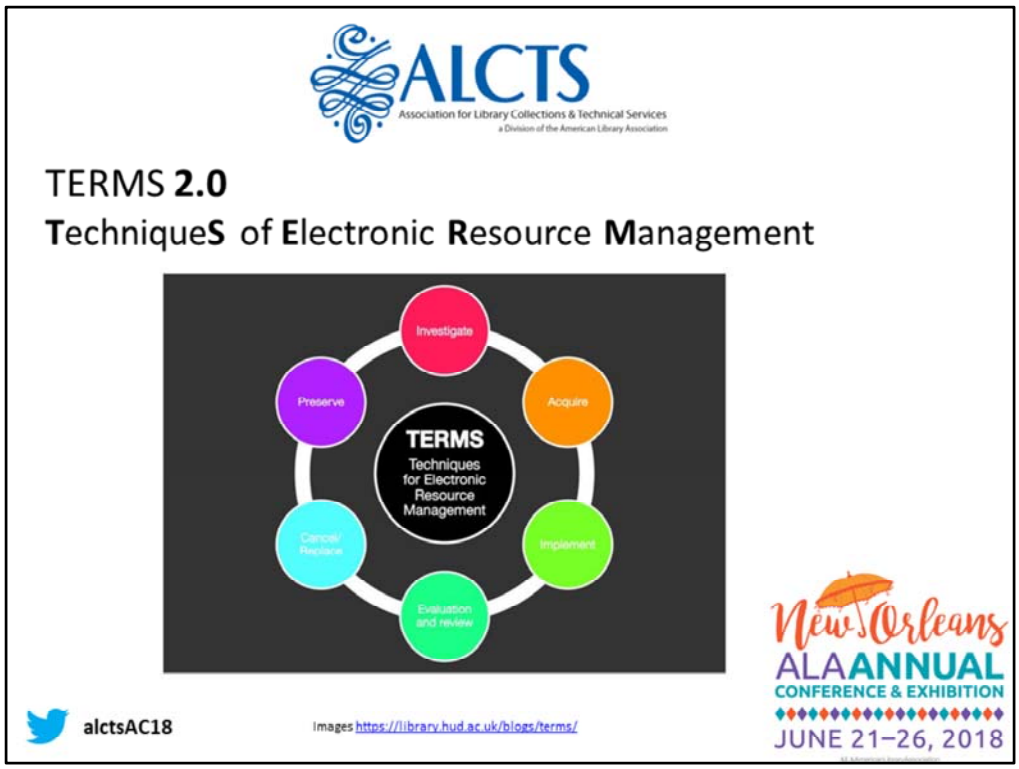


This model was created from as crowdsourcing wiki project spearheaded by Jill Emery & Graham Stone. Essentially it gathered contributions from across the library community to categorize and share best practices of e-resource management.

The original 6 terms reflecting these best practices were categorized as:

- **Investigating** new content for purchase or addition
- Actually **Acquiring** that new content
- **Implement**ation which goes beyond traditional cataloguing.
- Ongoing **Evaluation** and maintaining access
- Annual **Review** for continued value of the product, service, license terms.
- **Cancellation & Replace**ment which may involve many steps of undoing the process of implementation.

These best practices reflect the cyclical nature of electronic resource management, mirroring a model **[CLICK]** first presented by Oliver Pesch (EBSCO). https://library.hud.ac.uk/blogs/terms/ to illustrate how much Acquisitions workflows have changed. What needs to be tracked and monitored is more than any one person or tool could manage.

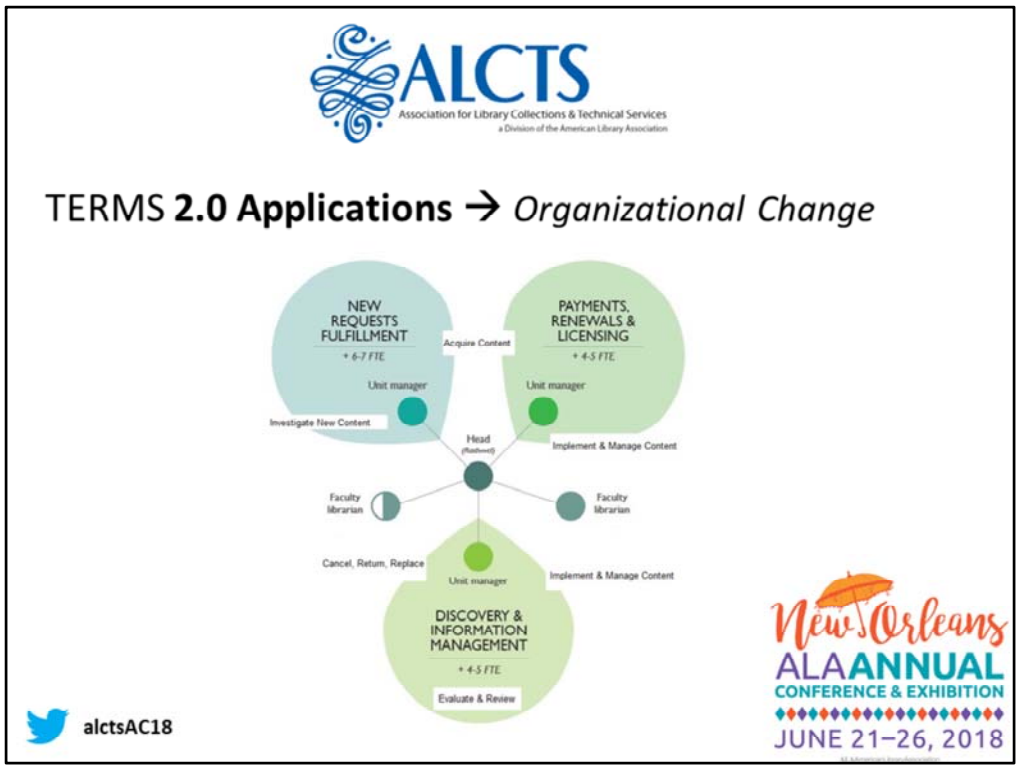


In the Spring of 2017 the TERMS team launched a plan to update the project, consolidating evaluation and review sections into one, adding Preservation as a new component, and accounting for open access elements throughout the cycle. Peter McCracken (Cornell University and co-founder of Serials Solutions) has also joined the 2.0 team. Since April the model has refined these sections even further based on library community feedback, renaming them to more clearly to illustrate the function and incorporating subsections. Overall the model intends to presents a comprehensive and succinct picture of e-resources as a lifecycle rather than the more linear process of print acquisitions. And this has resulted in many opportunities to rethink many traditional approaches to workflow, communication, technology and staffing.

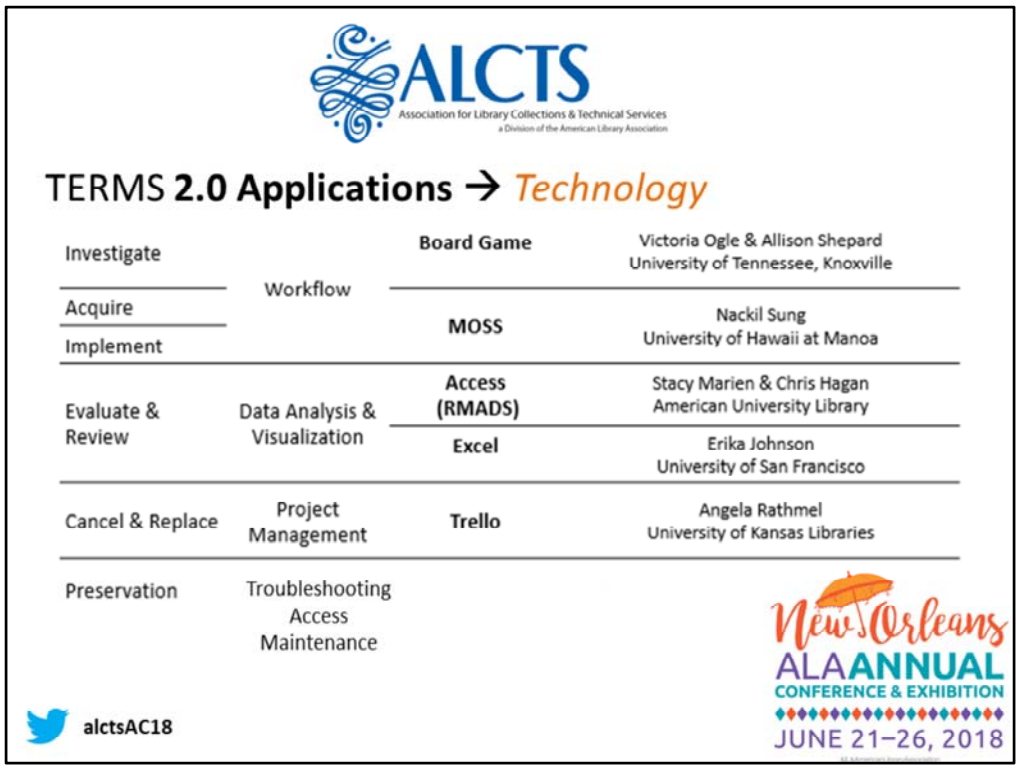
As a result of this the TERMS model has been applied to a variety of contexts. For example it is an excellent training tool for new e-resource librarians, or for other librarians and staff to brush up on individual sections or portions of e-resource workflows, whether in selection, to acquisitions, to cataloging, or troubleshooting.

[CLICK] My own research into organizational change and communication has guided an interest for me about what happens ***between*** the TERMS sections , looking in particularly at the ***communication*** needed to manage the handoffs in this workflow.

I began exploring possible applications in this vein from ER&L conferences I attended in the past. On big initial takeaway was how e-resource management staffing might align differently against this model. Does it offer an alternative to the single e-resource librarian expert to something more like dispersed e-resource expertise across many librarians and staff? Sarah Sutton's Core Competencies research addressed the knowledge and skills of e-resource management through positions description analysis. While communication can be considered a ubiquitous skill in many position descriptions, how e-resources changed acquisitions work, justified codifying this skill as a core component of e-resource management work. As communication and training new e-resource staff were my big areas of interest, I was looking for ways to incorporate these into my work. Unfortunately, my attempt to acronymize knowledge, skills, and communication have not gained the same notoriety.

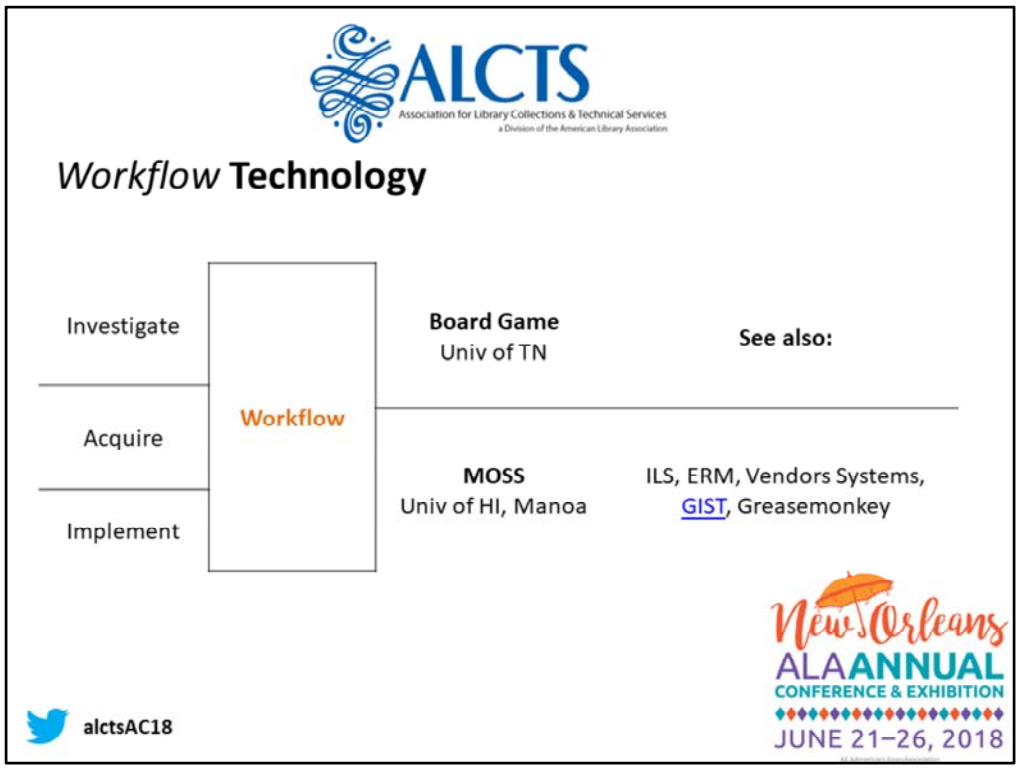


I have however applied this model to organizational restructuring in Acquisitions and Resource Sharing. This is the org chart resulting from combining the two disntinct departments into a single department. The purpose of the restructuring was to better accommodate declining print workflows and growing electronic resources. We had 3 units to work with, so found the most sense from creating units around functions of the beginning techniques of acquiring materials, whether purchased, or added, or borrowed and lent, -- calling this New Request Fulfillment, then to payments and licensing dealing primarily with acquiring and implementation, and finally a unit deveoted to information management aspects of implementation, review, and troubleshooting. Creating unit identities and their working interrelationships within this framework allowed the structure to reflect its purpose and provides opportunity to actively practice that understanding in the day-to-day.



Today our purpose is to give you all a similarly active, and participatory application of this model as we explore how its framed by Acquisitions Technology. We've matched up the tools we'll explore today against the most common workflow needs at each stage of the TERMS lifecycle, creating further consolidated groupings of some areas as you can see.

I'll just briefly go over how each of these formed out of the TERMS framework, then our speakers will each give a preview the tool that will be available for hands-on exploration later today.



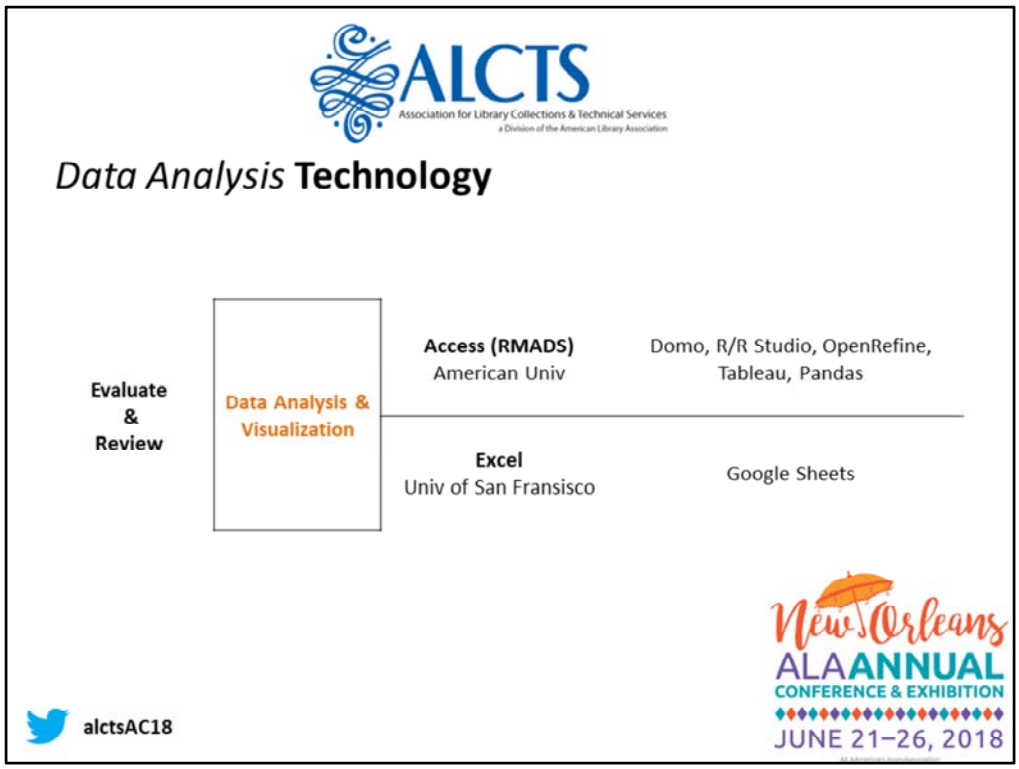
So, the first three stages **[Investigate, Acquire, and Implement]** can be supported by workflow tools and technologies. Obviously these involve standard systems such as your ILS, ERM, and your vendor systems, but there are supplemental tools that can piece these systems and their data together in ways that make training and workflows more efficient.

How many are familiar with GIST? GIST and Greasemonky are a couple of open source tools that pull together disparate workflows in these first stages of acquisition.

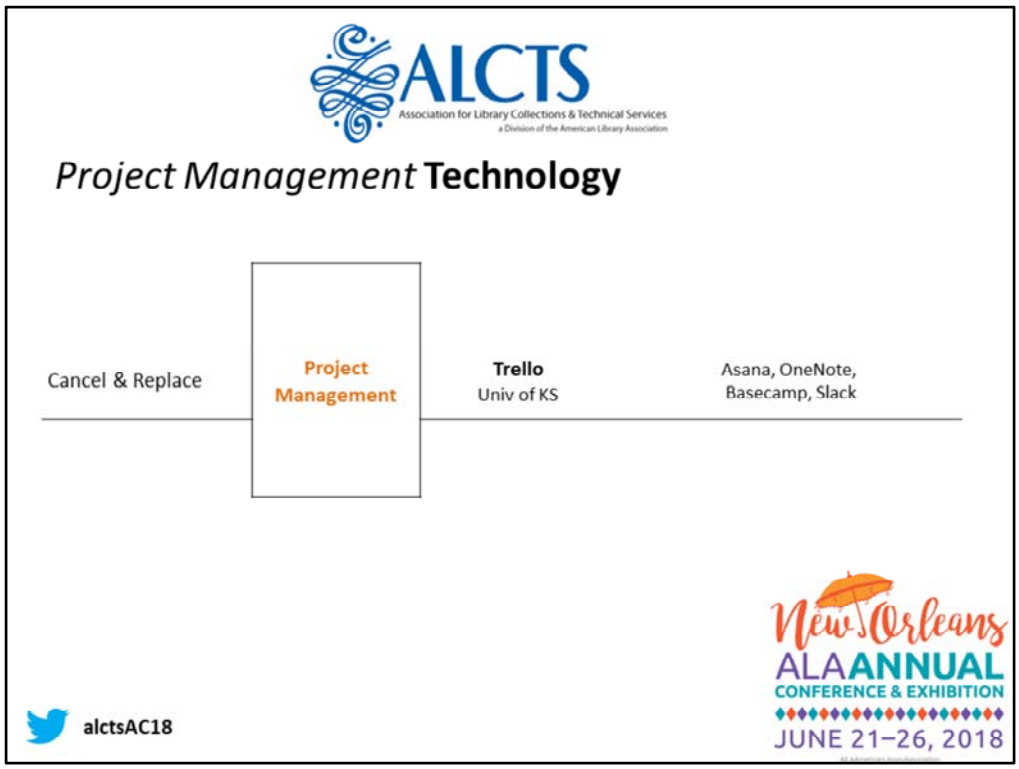
GreaseMonkey is browser script (also open source and customized for Voyager) that connects library holdings and vendor systems to help with deduplication in the selection or ordering process.

GIST which stands for Getting It System Toolkit, has two different components – a gift and deselection manager which allows you to compare holdings and establish weighted factors for selection and deselection processes. And another -- GIST for ILLiad -- which assists with patron driven acquisitions vs. ILL decision-making.

Today you'll have a chance to explore two different locally developed hacks for workflow -- one addressing overall workflow navigation and another for streamlining the requests to order process.



Evaluation & Review involves technology hacks for compiling, cleaning, and analyzing your acquisitions and collections data, like budget allocation and expenditure tracking, or e-resource usage statistics collection. We will demonstrate how spreadsheet and database tools can help you to more easily and accurately combine data sets, reconcile data errors, and create reportable visualizations from your data, with less manual manipulation. We'll be working with standard MS Office applications today, but additional free or open source options like **Google Sheets, Tableau, Open Refine, and more**… will be shared in more detail in the resources handout.

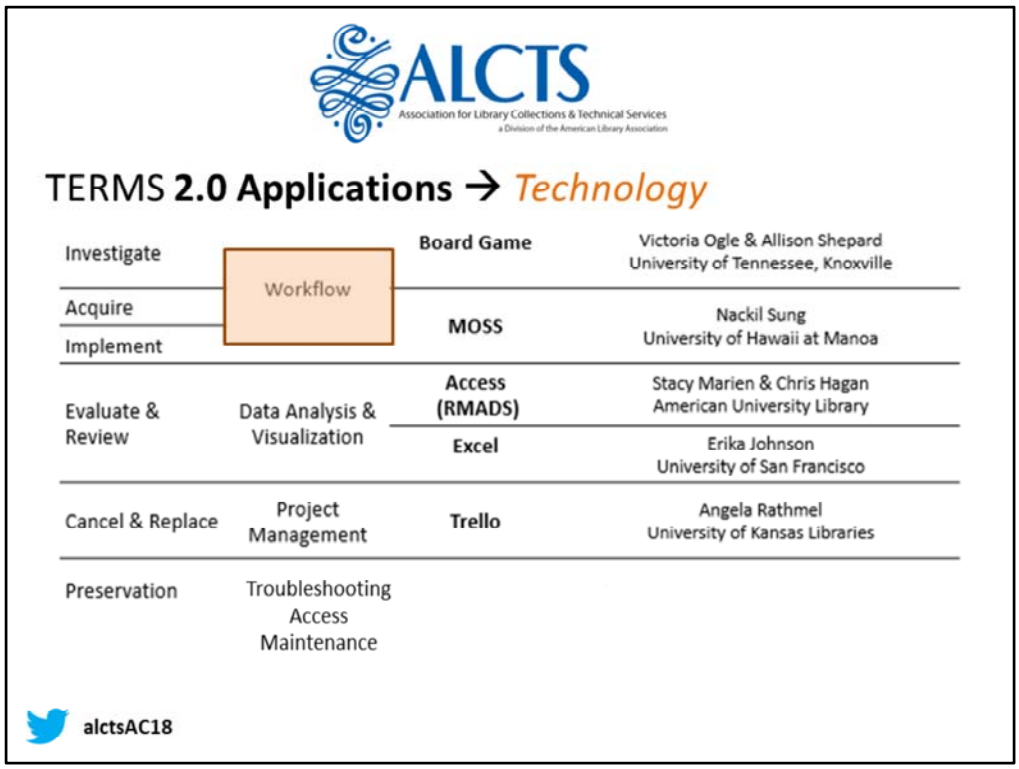


The accuracy and consolidated data generated from those analysis tools will be critical for the project-based work of cancellation and replacement. Project Management is a set of skills and a technology tool for many library services, not just Acquisitions. The primary purpose of the framework of project management, supported by technology has to do with facilitating the identifying of key stakeholders with whom you'll need to communicate and when across the course of the project, a means to break down the project (called the work breakdown structure) into component parts and assign tasks from which you build a timeline, and ultimately ways to keep track of and adjust timelines in progress. I'll be demonstrating the tool Trello, which is just one of many project management tool options.

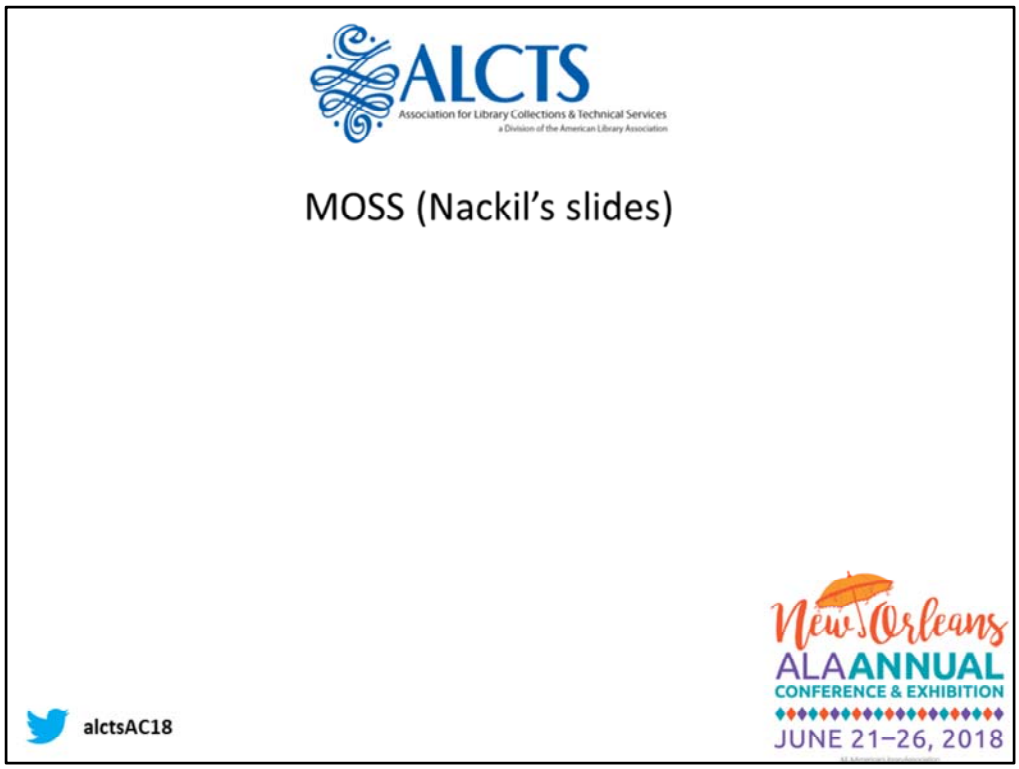
We're not demonstrating a tool for the Preservation piece today but in this framework, the word *preservation* concerns how durable the access is for the content we've acquired, ensuring perpetual access, in your ILS, as well as local and cloud-based preservation options, like LOCKSS, CLOCKS, Portico, or through shared preservation structure, like the WEST Project. For acquisitions, other technologies can help with the triggers for both proactive and reactive responses to maintaining access, and responding to troubleshooting service issues for patrons.

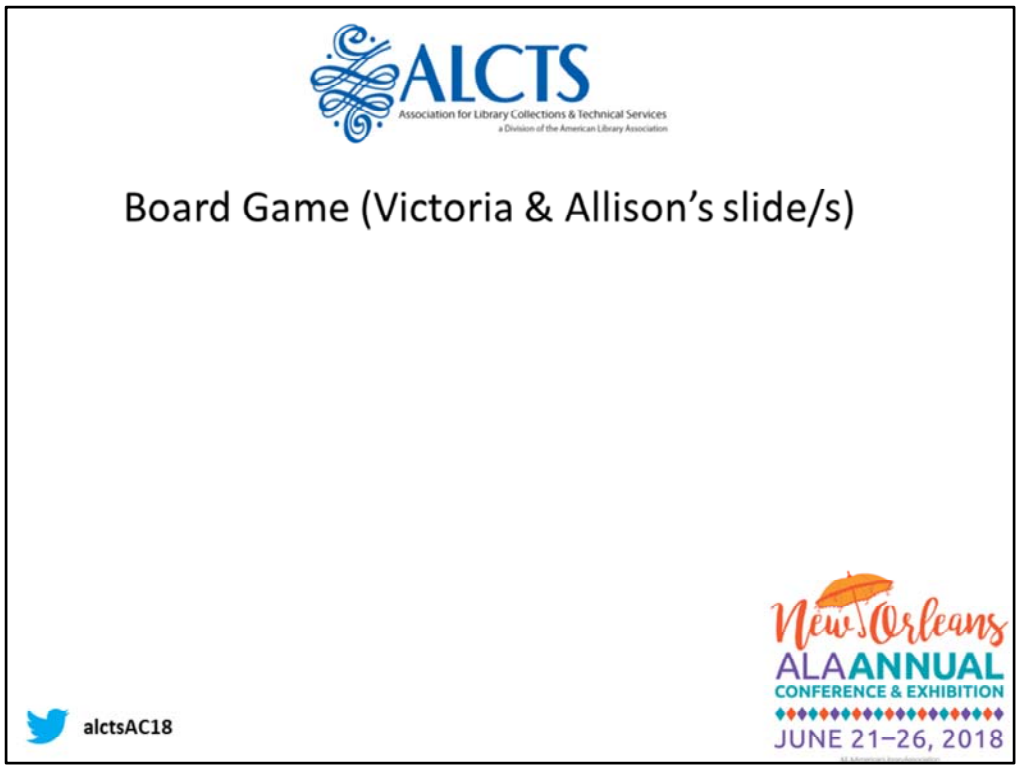
Studies have found what you probably already know from your own experience -- libraries are primarily using email for most of their acquisition work, including troubleshooting e-resource access. But there are a number of technology hacks to improve the use of email, and alternatives to email than can provide more reliable tracking of issues, include more collaborative referral mechanisms, and analytics features for more proactive maintenance – before patrons report them. These, again, will be shared in the resources handout.

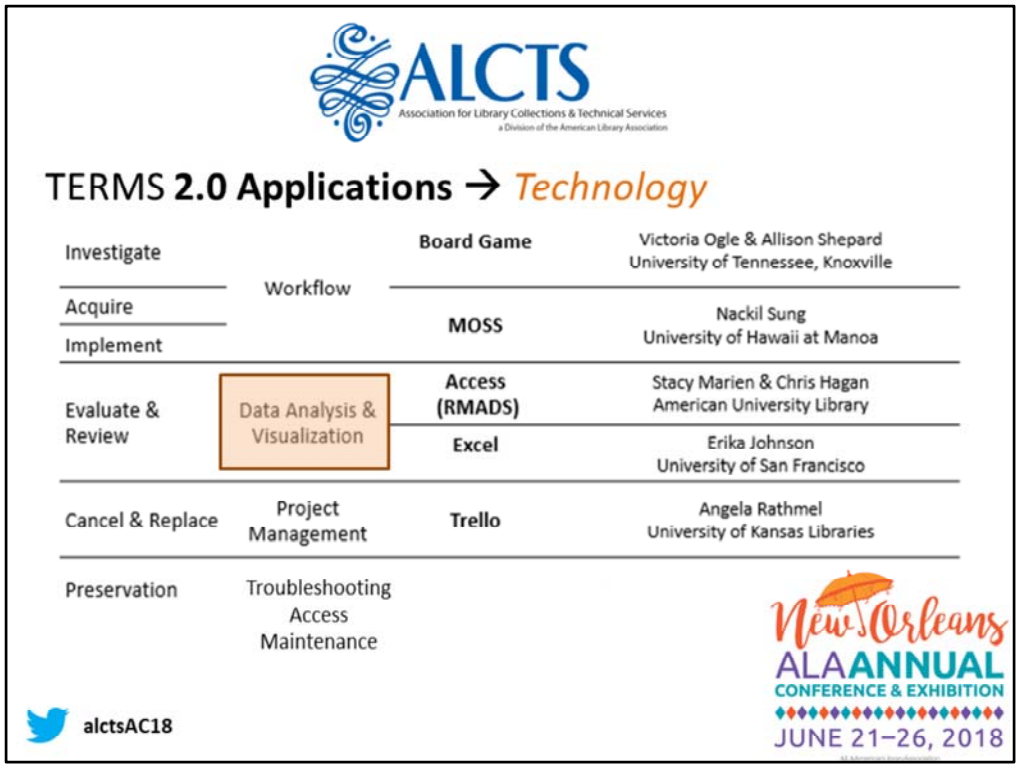
We also have not covered open access elements that are continuing to be developed in the TERMS 2.0 model. As they did not lend themselves to hands-on application. However, the TERMS provides excellent examples of techniques and technology in each of these areas that are worth exploring.



Now, I'd like to turn the dial back to the beginning set of tools addressing workflow, and invite my colleagues to share a preview of their hacks for acquisitions workflow.


ALCTS
Association for Library Collections & Technical Services
a Division of the American Library Association
MOSS (Nackil's slides)
alctsAC18
New Orleans
ALA ANNUAL
CONFERENCE & EXHIBITION
JUNE 21–26, 2018


ALCTS
Association for Library Collections & Technical Services
a Division of the American Library Association
Board Game (Victoria & Allison's slide/s)
alctsAC18
New Orleans
ALA ANNUAL
CONFERENCE & EXHIBITION
JUNE 21–26, 2018

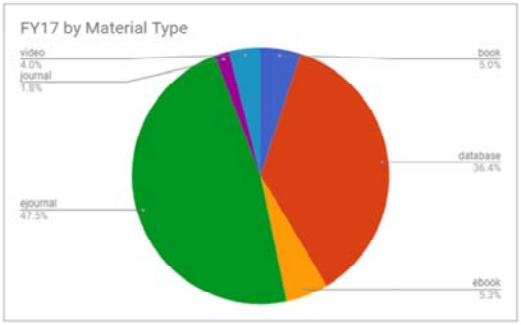

ALCTS
Association for Library Collections & Technical Services
a Division of the American Library Association
TERMS 2.0 Applications → Technology
Investigate
Acquire
Implement
Workflow
Board Game
Victoria Ogle & Allison Shepard
University of Tennessee, Knoxville
MOSS
Nackil Sung
University of Hawaii at Manoa
Evaluate & Review
Data Analysis & Visualization
Access (RMADS)
Stacy Marien & Chris Hagan
American University Library
Excel
Erika Johnson
University of San Francisco
Cancel & Replace
Project Management
Trello
Angela Rathmel
University of Kansas Libraries
Preservation
Troubleshooting
Access
Maintenance
alctsAC18
New Orleans
ALA ANNUAL
CONFERENCE & EXHIBITION
JUNE 21–26, 2018

ALCTS
Association for Library Collections & Technical Services
a Division of the American Library Association
RMAD (Chris & Stacey's slide/s)
alctsAC18
New Orleans
ALA ANNUAL
CONFERENCE & EXHIBITION
JUNE 21–26, 2018

ALCTS
Association for Library Collections & Technical Services
a Division of the American Library Association

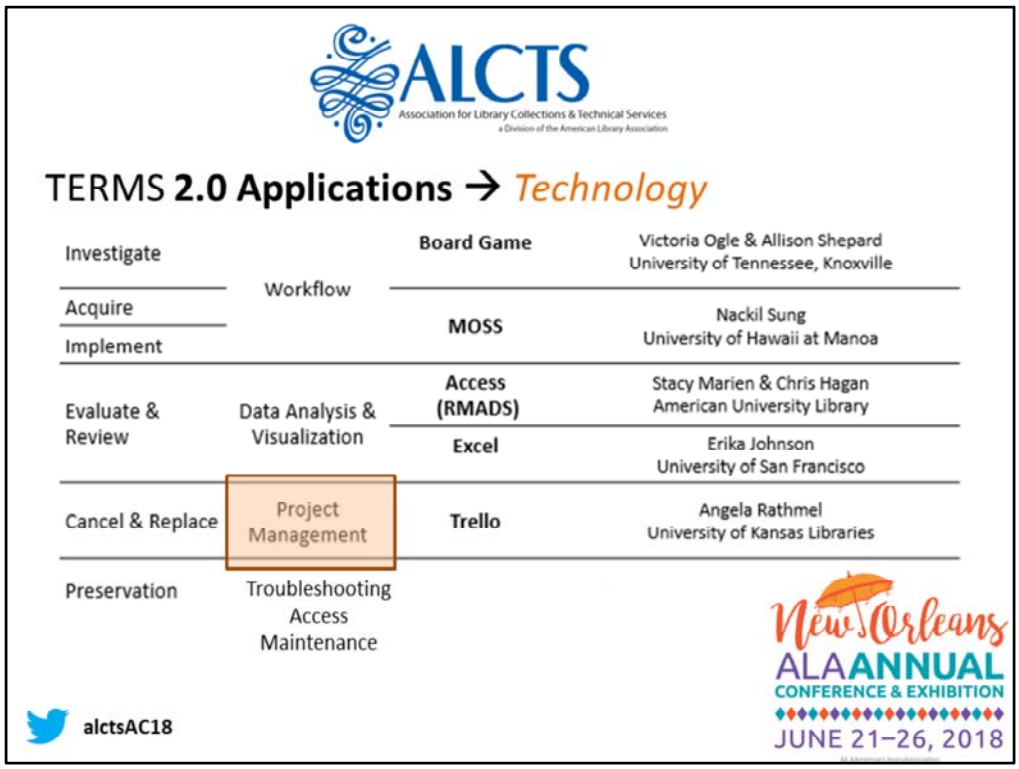
Excel / Google Sheets

- Creating pivot tables and charts

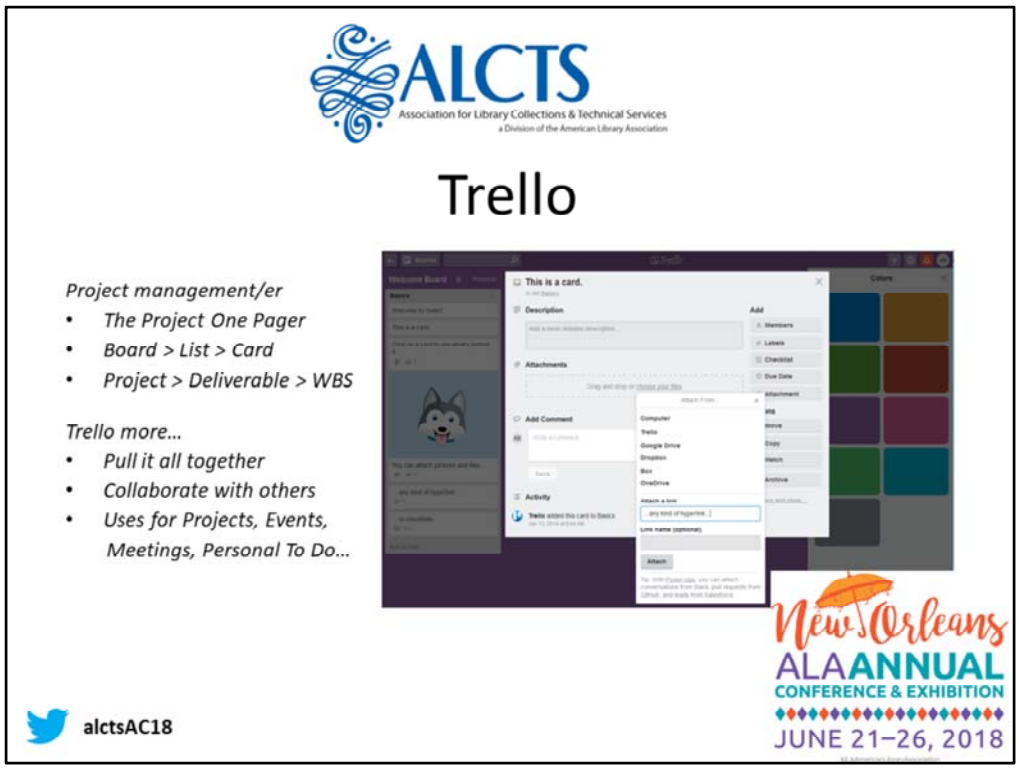


alctsAC18

New Orleans
ALA ANNUAL
CONFERENCE & EXHIBITION
JUNE 21–26, 2018



OK, I spoke a bit before about the basic framework of project management. Primarly it is kind of a workflow hack as well, but in a more defined sense. Project, as you may have heard reiterated have a beginning and an end – so in this sense NOT the same as workflow.



The basic building blocks of Project Management include mapping out the project in what's called a Project One-Pager. First asks you to think about the end in mind, describe that in terms that answer the questions people on the project will have. Then take key outcomes (aka deliverable) concrete things produced from the project and breaking them down into what its going to take, what actions to be tracked, assigned, and accomplished. And the project manager needs a mechanism to manage the project at a glance as well as the at the granular task level. The project one pager contains all the elements of a project are summarized here so that stakeholders can refer back to it throughout the project without wading through other communications or project materials.

Trello is a collaboration platform but in that sense it is also a platform for managing the collaboration of a project with a defined beginning and end (as opposed to ILS or email which provide a more ongoing work construct for the content they manage). The basic structure of Trello consist of Boards (Project), List (Deliverables/Outomces), and the cards for the list is that work, task, broken down into actions and provided timeframe.

For the project team and manager it's a place that is on the one hand one stop for the project, but separated contextually from ongoing work you might manage in email, or you ILS.

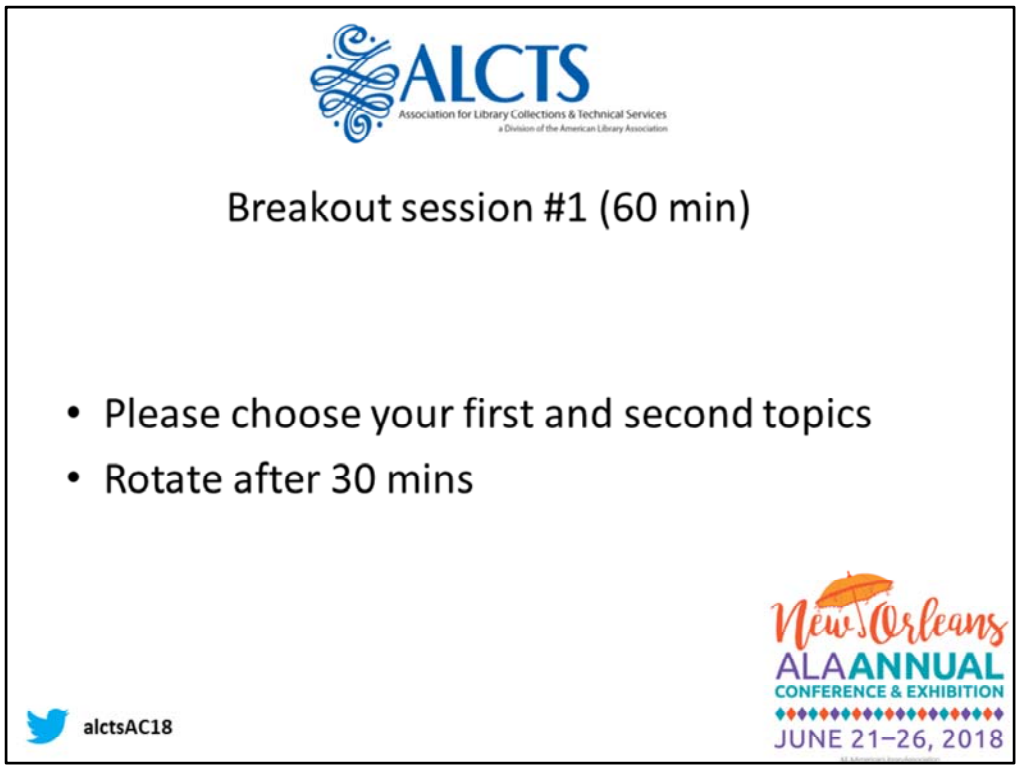
Examples, events like fiscal close, committee events (Snyder, Digital Humanities Forum); meetings (of events or if lacking other collaborative space) minutes, action items, attach documents),

Examples, on going work (renewals, licenses) reusable, checklists, archive and copy from

year to year
https://trello.com/b/vI5SaASr/licenses

Examples personal to dos (home, work, play); research & service

So this afternoon, we will go through creating an account, project or event or to do lists you want to use for testing both basic and some advanced features.


ALCTS
Association for Library Collections & Technical Services
a Division of the American Library Association
Breakout session #1 (60 min)
• Please choose your first and second topics
• Rotate after 30 mins
alctsAC18
New Orleans
ALA ANNUAL
CONFERENCE & EXHIBITION
JUNE 21–26, 2018