

Products and Services Vetting Committee Recommendation (PSVC)

March 3, 2008

At their March 3, 2008 meeting the PSVC of the CARLI Board discussed a recommendation from the I-Share Acquisitions and Serials Team that CARLI negotiate for an Electronic Resource Management System (ERMS) on behalf of interested members.

As a result of that discussion, the PSVC recommends that

“CARLI prepare, release and evaluate an RFP for an ERMS to be used both in the CARLI office and available to member libraries at a discount.”

After the RFP is evaluated, the staff will discuss with the Board the advantages of different hosting options and recommend which has the best chance of success. A short background document is attached.

CARLI and an ERMS

Background submitted by the I-Share Acquisitions & Serials Team
February 20, 2008

In May 2007, the I-Share Acquisitions and Serials Team (IACQ) proposed that CARLI facilitate informational webinars on electronic resource management systems (ERMSs) from different vendors, so that the CARLI community could get a closer look at an important library management tool and better understand its uses. These sessions were offered in August 2007 and attended by over 60 librarians and staff from the CARLI membership. This proposal derives both from the participation of all members of the IACQ Team and from the sentiments heard from the membership that CARLI should begin pursuing consortial options for implementing ERMS solutions.

With the rapid increase in the number of electronic resources that libraries are now making available to their patrons, librarians find themselves awash in details of the trial, purchase, licensing, contact information, accounting, access methods, technical product support, authentication, and usage statistics for each electronic resource. These details are not one-time activities to be concluded upon the initial purchase, but are ongoing throughout the life of each product. For example, a vendor may change the Web address for its product, and the library must ensure that access to the product continues smoothly for all patrons; if the library subscribes to several of that vendor's products, or if some of those products are aggregated, the problem becomes even more complicated. In addition, as companies merge, split, and change names, keeping track of billing, licensing, support, contact, and access information becomes difficult. Multiply each of these issues by the number of the electronic resource subscriptions each library maintains and it becomes obvious that the homegrown tracking mechanisms in use by many libraries today are insufficient, inefficient and unwieldy.

ERMSs provide solutions to the above problems by integrating all of the information about each electronic resource in one place so librarians can easily see and maintain licensing, copyright, access information, usage statistics, pricing, etc., without having to consult various staff or multiple files. An ERMS allows a library to make efficient use of its human and monetary resources by maintaining current, accurate information about the disparate aspects of its electronic resources in one central, easy-to-use system. Examples of ERMS products on the market are ExLibris' Verde, Innovative Interfaces' ERM, and Serials Solutions' 360 Resource Manager.

The need for an ERMS is widely acknowledged in libraries, and CARLI member libraries are turning to CARLI for help. However, the amount of effort that would be required by CARLI to support a product of this nature will be significant. It is clear that some portion of the initial cost and ongoing maintenance of an ERMS solution will have to fall to member libraries.

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