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Coming to TERMS

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Two decades after the advent of electronic journals and databases, librarians are still grappling with ways to best manage e-resources. These times of economic austerity are also creating budgetary pressures at many institutions of higher education, with the result that librarians must continually justify their spending on collections and resource management.

Techniques for Electronic Resource Management (TERMS) began in 2008 after we began discussing electronic resource management (ERM), current ERM tools, the lack of consistency in practices, and missing features in the available systems. As a set of guidelines, TERMS seeks to become a reference point for those who are new to ERM, those who have suddenly shifted job functions to oversee ERM, and those who are looking for recommendations.

After swapping ideas between library organizations in the United States and the United Kingdom on what ERM actually means, we came up with six TERMS, started working on a draft document, and created a plan for a crowdsourcing review. During 2012, the latest draft was migrated to a [wiki](#) in order to be shared, monitored, and updated by librarians throughout the world. With input from the field, we wrote the *Library Technology Report* titled “[Techniques for Electronic Resource Management](#).”

The wiki received positive feedback from librarians in the United States, Brazil, India, Ireland, and the United Kingdom, and as a result, several librarians have offered to work on six segments of future versions of the wiki as open peer reviewers:

- TERMS 1: Investigating new content for purchase or addition. Assigned to Ann Kucera, Baker College, Flint, Michigan.
- TERMS 2: Acquiring new content. Assigned to Nathan Hosburgh, Montana State University, Bozeman.
- TERMS 3: Implementation. Assigned to Stephen Buck, Dublin City University, Ireland.
- TERMS 4: Ongoing evaluation and access. Assigned to Anita Wilcox, University College Cork, Ireland.
- TERMS 5: Annual review. Assigned to Anna Franca, King’s College, London, United Kingdom.
- TERMS 6: Cancellation and replacement review. Assigned to Eugenia Beh, Texas A&M University, College Station.

In 2012, TERMS was endorsed by the Knowledge Base+ project in the United Kingdom, a project of JISC Collections made up of a set of “workflow management tools related to the selection, review, renewal, and cancellation of publications.” It has also received interest in the United States from GOKb (Global Open Knowledgebase) managed by Kuali OLE (Open Library Environment), a community of nine research libraries working together to build an open-source system designed by and for academic and research libraries that will manage and deliver intellectual information.

TERMS was used in 2011 as a teaching aid by Galadriel Chilton at the School of Library and Information Studies at the University of Wisconsin–Madison to establish a key framework for its ERM class. The library community at large has been interested in the development of in-person presentations on TERMS, and so the authors have sought feedback at such library events as the Electronic Resources and Libraries conference in the US and the LIBER conference in Europe.

The wiki entries will develop as new formats evolve and next-generation web-scale management systems become more widely adopted. TERMS is already showing that the content in each of the six wiki pages is useful for preparing electronic resources managers to map and understand the e-resources cycle, enabling seamless access for patrons and creating efficiencies in the e-resources workflow.