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A Year of Techniques for Electronic Resource Management: The Work of the Marcia Tuttle Award Winner for 2012

Jill Emery & Graham Stone

TERMS (Techniques for Electronic Resource Management) began in 2008 by Jill Emery and Graham Stone as a joint project to depict the best practices of electronic resource management from the U.S.A. and UK perspectives. Initially, we spent time developing the concept of TERMS and determining the areas of focus. Starting in 2011, Graham and Jill started the next phase of crowdsourcing the best practices for each segment of the electronic resources lifecycle as defined by Oliver Pesch, Chief Strategist for EBSCO Information Services. Our crowdsourcing was done via Tumblr, Twitter, and Facebook and was opened up to the world for input on management techniques and workflows. To date, we have 48 followers on Tumblr, 171 followers on Twitter and 208 members to our Facebook page. Initially, we posted each segment as conceived and asked for feedback from our followers. In this regard, we consider TERMS to be very successful as we received many valuable comments and workflows from various members of the community. Following the international feedback we received, we started a wiki to present a more cohesive version of TERMS as well as to provide a platform for the sharing of workflows:

http://library.hud.ac.uk/wikiterms/Main_Page

Following the establishment of the wiki and just prior to our publication, we named section editors to each of the TERMS sections for the wiki and this group is made up of three people from the U.S.A. and three people from the UK and Ireland. In February/March, 2013, we published *Techniques for Electronic Resource Management* as Vol.49 #2 of *Library Technology*

Reports. All of our open access presentations on TERMS can be found on the University of Huddersfield Repository site here: <http://alturl.com/uceqy>.

After being awarded the Marcia Tuttle International Award in the summer of 2012, we chose to use the financial support to bring TERMS to three conference events in 2013: Electronic Resources & Libraries (ER&L), UKSG, and ALA Annual as a Pre-Conference. At the Electronic Resources & Libraries Annual Conference in Austin, TX, Jill Emery presented the outcomes from our year-long crowdsourcing and some of the aspects we learned along the way. The presentation was given to around 100 attendees at the conference and has had forty-eight views on SlideShare™. Here is the link to the SlideShare™:

<http://www.slideshare.net/jillemary/developing-terms>

Following close on the heels of the ER&L presentation, Jill Emery and Graham Stone also did two presentations at UKSG to around 200 attendees. These sessions were very well received by the attendees and provided us with some good feedback for edits to the wiki as well as the receipt of additional workflows. Our last presentation this year was a preconference on TERMS for ALCTS at the ALA Annual Conference. We had twenty-eight participants in a day-long session to work through each TERMS segment and consider how workflow could be drafted based on each section. Simple workflow assignments were given based around e-journals, e-books, databases, and e-service platforms with groups varying in size from three participants up to

about six. Overall the preconference was well rated by the attendees and the take-away of having a copy of the *Library Technology Report* to refer back to was appreciated.

Graham and I have both received extremely positive feedback from the electronic resources community as a whole throughout this endeavor. Librarians from as far away as India and Brazil have shown keen interest in the project and have given us reason to believe that this project has been truly international in scope and impact. We have had a series of conversations with library professionals in India about how TERMS could be adapted for their needs; we have also had an enquiry from the American Association of Law Librarians about presenting at their 2014 conference. This is a direct

result of the ALA pre-conference and we are very pleased to have interest from special libraries. A future goal is to propose an IFLA presentation on TERMS for 2014 from the feedback that we've received from the international community.

Our one disappointment is the lack of integration of TERMS by NASIG into the NASIG Core Competencies for Electronic Resources Librarians or even reference to the TERMS within this document. That said, it appears that TERMS is achieving what the funding from the Marcia Tuttle award is intended to do, have an international impact and for that we are ever grateful to NASIG for making TERMS an internationally shared idea and exchange of practice.