## 1. Introduction and Purpose

The OhioLINK 2.0 ERM Task Force is charged with sharing information among libraries and developing best practices for electronic resources management. We are seeking your input with determining the approaches used to manage electronic resources at OhioLINK institutions. We are interested to learn whether your library uses a vendor's ERM system, a local spreadsheet, or some other method.

We very much appreciate your response and input. We ask that only one survey is completed per institution. Please complete and submit on behalf of your institution or forward the survey to the appropriate person at your institution. This survey will take approximately 15 minutes to complete. Results will be reported in the aggregate.

**DUE DATE: September 3, 2010**

Thank you,
**OhioLINK 2.0 ERM Task Force**
Susan Banoun (co-chair), University of Cincinnati
Emily Hicks (co-chair), University of Dayton
Frank Bove, University of Akron
Cherie Bronkar, Muskingum University
Anita Cook, OhioLINK
Kay Downey, Kent State University
Barbara Dunham, The Ohio State University
Deberah England, Wright State University
Amy Frye, Bowling Green State University
Sharon Hackett, Kent State University
Kristine Kinzer, Ohio Wesleyan University
Jeanne Langendorfer, Bowling Green State University
Joe Payne, The Ohio State University-Health Sciences

## 2. Demographic Information

**\* 1. Institution type:**

⏚ 2-year, public

⏚ 2-year, private

⏚ 4-year, public

⏚ 4-year, private

**\* 2. Institution size (full time enrollment):**

⏚ Small (Under 5,000)

⏚ Medium (5,000-10,000)

⏚ Large (over 10,000)

**\* 3. To how many databases does your library subscribe (including OhioLINK)?**

> [                    ]

**\* 4. What is your library's approximate total annual materials budget allocation?**

> [                    ]

**\* 5. What percentage of your materials budget is spent on electronic resources?**

> [                    ]

**\* 6. Who is the primary contact for electronic resources management at your institution?**

| | |
|---|---|
| **Name:** | [                    ] |
| **Institution:** | [                    ] |
| **Address:** | [                    ] |
| **Address 2:** | [                    ] |
| **City/Town:** | [                    ] |
| **State:** | [              6] |
| **ZIP:** | [                    ] |
| **Email Address:** | [                    ] |
| **Phone Number:** | [                    ] |

**3.**

* **7. Does your library have an electronic resources management (ERM) system (either vendor-supplied or locally developed)? (Excluding A to Z lists)**

  jn  Yes

  jn  No

* **8. What ERM system does your institution use (excluding A to Z lists)? Check all that apply.**

- Innovative Interfaces Electronic Resources Management module

- Serials Solutions 360 Resource Manager E-Resource Management Service

- EBSCONet ERM Essentials

- Verde (Ex Libris)

- Locally developed spreadsheets or databases

- If other, please list:

**9. What types of information are currently collected in your library's ERM system and to whom does that information display? Check all that apply.**

| | In ERM? | Display to public? | Display to staff? |
|---|---|---|---|
| Databases | ∈ | ∈ | ∈ |
| Electronic journals | ∈ | ∈ | ∈ |
| Electronic books | ∈ | ∈ | ∈ |
| Resource descriptions | ∈ | ∈ | ∈ |
| Vendor/contact information | ∈ | ∈ | ∈ |
| Trial information | ∈ | ∈ | ∈ |
| Purchase approval information | ∈ | ∈ | ∈ |
| Payment history | ∈ | ∈ | ∈ |
| Renewal information | ∈ | ∈ | ∈ |
| Coverage dates | ∈ | ∈ | ∈ |
| License information for permissions/prohibitions | ∈ | ∈ | ∈ |
| License information for ILL/fair use | ∈ | ∈ | ∈ |
| Tutorials/user guides | ∈ | ∈ | ∈ |
| Login/passwords | ∈ | ∈ | ∈ |
| Resource advisories | ∈ | ∈ | ∈ |

**10. What other types of information does your library collect in the ERM system?**

## 11. Which of the following functions are currently in use with your ERM? Check all that apply.

- ⊖ Links to order records
- ⊖ Links to checkin records
- ⊖ Links to scanned licenses
- ⊖ Ticklers/reminders
- ⊖ Import statistics for cost per use (including SUSHI)
- ⊖ Incidents log for staff
- ⊖ Tracking license workflow
- ⊖ Tracking set up and activation
- ⊖ Tracking cancellations

## 12. Do you use vendor-supplied coverage loads?

- ◌ Yes
- ◌ No

If yes, from which vendor? (Innovative, Serials Solutions, EBSCO, or other)

## 13. Do you load related MARC records in your library's catalog for collections of electronic resources?

- ◌ Yes
- ◌ No

If yes, how are the records supplied? (Serials Solutions, EBSCO, TDnet, OhioLINK, or locally searched)

**14. Do you feel your library's approach to electronic resources management is sufficient?**

ʝ∩  Yes

ʝ∩  No

ʝ∩  Not sure

**15. Are there areas of electronic resources management where you need assistance? (Please be as specific as possible)**

**8.**

*  **16. Are you willing to share information about your ERM system settings/customizations with the OhioLINK 2.0 ERM Task Force?**

  jn  Yes

  jn  No

  jn  Maybe

  If yes, briefly explain what types types of information you would be willing to share

## 9.

\* **17. You have indicated that your library does not have a vendor-supplied or locally developed electronic resources management system. Why? Check all that apply.**

- ⊝ Not needed

- ⊝ Cost prohibitive

- ⊝ No staff to implement

- ⊝ No time to implement

Other (please specify)

**18. What is your approach to the management and maintenance of electronic resources information?**

jn Handled by another library at your institution

jn Handled by another library outside of your institution

jn Handled by OhioLINK (no locally purchased resources)

jn Handled locally by your institution

Other (please specify)

**19. Do you feel your library's approach to electronic resources management is sufficient?**

- j̇n  Yes

- j̇n  No

- j̇n  Somewhat

- j̇n  Do not know

Please explain your answer

**20. Are there areas of electronic resources management where you need assistance? (Please be specific as possible)**

**21. Which area of the library is primarily responsible for the management and maintenance of electronic resources information? Check only one.**

jn Electronic Resources

jn Collection Development/Management

jn Cataloging

jn Acquisitions

jn Serials

jn Reference

jn Systems

Other (please specify)

|  | 5 |
| --- | --- |
|  | 6 |

**22. Which other areas are also involved? Check all that apply.**

e Electronic Resources

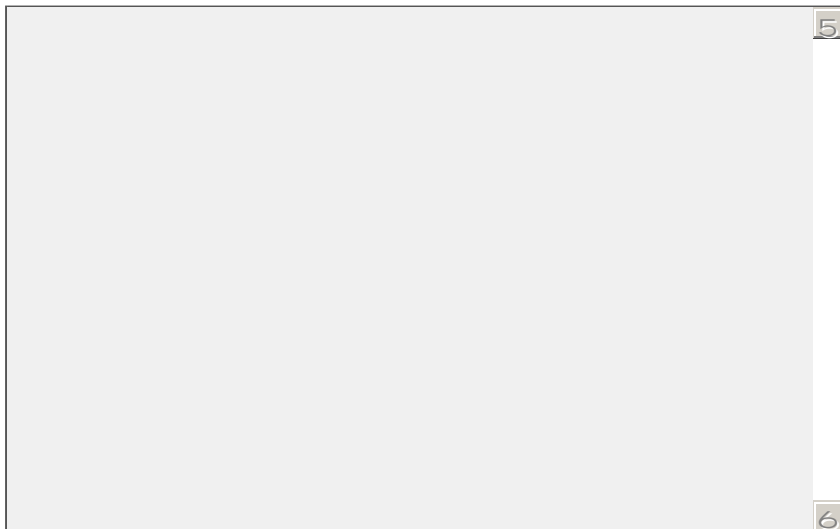e Collection Development/Management

e Cataloging

e Acquisitions

e Serials

e Reference

e Systems

Other (please specify)

|  | 5 |
| --- | --- |
|  | 6 |

**23. Briefly explain how the work related to the management and maintenance of electronic resources information is distributed. (For example, acquisitions tracks vendor information, reference writes resource descriptions, etc.)**

**24. How many staff members (excluding student assistants) handle the various aspects of managing electronic resources information?**

- ○ 1-2
- ○ 3-5
- ○ 5-10
- ○ 10-15
- ○ 15 or more

**25. How many student assistants handle the various aspects of managing electronic resources information?**

- ○ 1-2
- ○ 3-5
- ○ 5-10
- ○ 10-15
- ○ 15 or more

**26. Estimate the number of FTE (staff and students) handle the various aspects of managing electronic resources information?**

## 13. Comments

**27. Please provide any comments or other information you would like to share with the OhioLINK 2.0 ERM Task Force.**

## 14.

Thank you for your time and participation. Have a nice day!