Meeting the Challenge: Creating a Sustainable Renewals Calendar

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Today’s Topic

Meeting the Challenge: Successful Electronic Resources Management in the Absence of a Perfect System
Why Renew?
Why a Renewals Calendar?

Purpose

• Track and display important renewal dates
• Allow the library to proactively assess electronic resources
• Permit strategic decisions about realigning/grouping renewals

Requirements

• Sustainable
• Accessible to all stakeholders
• Integrate into existing work
We created a renewals calendar...

How did we do it?

1. Mapped workflows for how we were disseminating renewal information at the time
2. Identified where UBC renewal data was living
3. Assessed our ERM’s functionality for managing renewals
4. Investigated how other libraries were tracking renewals
5. Developed a plan for managing and calendaring our renewal data
Existing Renewals Workflow (direct subscriptions)

- **Reactive**
- **Data Integrity Issues**
- **Manual**
What about our ERM?

- Serials Solutions 360 Resource Manager
  - No calendar view
  - Renewals data stored at the license-level

*Based on the functionality of Resource Manager in summer 2012. Serials Solutions recently upgraded Resource Manager so that renewals are resource specific (at the journal/database level). This is great news. I talk about how this affects our Why Renew? project work at the end of the presentation.
What are other libraries doing?

Informal Survey: What sorts of strategies and tools (calendaring software, ERM alerts, etc.) do you use to make renewal decisions?

Homegrown solutions in lieu of or alongside an ERM
- “Giant unwieldy Excel spreadsheet”
- Separate renewals database (built in-house)
- Using Google Sites to house vendor contact, licensing, statistics, and a renewal calendar

Looked for Literature on Library Renewal Calendars (unsuccessfully)

So what did we do?

Simplified

• Direct subscriptions only
• Stick to core information
• Generic non-renewal notice (90 days)*

Paid attention to data integrity

Looked to currently supported tools first

• Voyager ILS Module
• Microsoft Outlook

*Determined based on an analysis of the renewal terms outlined in licenses.
Renewals Query = Renewals Report

- Represents work formerly done by hand
- Report is appropriate for library-wide distribution
- Create calendar upload from report
Renewals Report + Calendaring template

Microsoft Outlook CSV. Template
- Core information from the renewals report
- Minimal reformatting
- Could be part of a monthly or quarterly process

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Automatic renew. UBC must give 30 days notice written notice prior to the end of the current term (SAE - SAE Academic Digital Library - License - 2011-02-02.pdf).
Moving forward

This is still a work in progress. At the end of the Why Renew? project we had a renewals calendar, but the ongoing implementation hasn’t happened.

Serials Solutions recently updated their Resource Manager to permit resource-level renewal management. We will need to evaluate the functionality that now exists in our ERM to see if we can begin storing our renewals information there.

Although this change to the ERM comes on the heels of us developing a UBC-specific solution to managing renewals, the Why Renew? project has made us more knowledgeable about our needs for storing renewals data; it forced us evaluate workflows and data management – something we needed to do, whether to maintain our own solution or to move our data to our ERM.
Questions?

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