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CORE COMPETENCIES FOR ELECTRONIC RESOURCES LIBRARIANS
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Introduction

The Core Competencies for Electronic Resources Librarians are based on research completed by the NASIG Core Competencies Task Force (NCCTF) and by its members individually. They are intentionally broad in scope in order to encompass work with electronic resources throughout the ER life cycle as it is encountered in various information organizations. These competencies are intended to be used in combination with the American Library Association's Core Competences of Librarianship and, in most cases, to build on them.

The Core Competencies for Electronic Resources Librarians do not lend themselves well to organization on a scale of increasing experience. Experience is important because electronic resources librarian (ERL) jobs are often not entry level positions, and employers tend to associate years of experience with the competencies they identify in job ads (Sutton, 2011). However, the competencies required for ERL positions vary greatly based on the type of institution in which the work is done and on the workflows within the organization. For example, an ERL in a small academic library might be responsible for the entire life cycle of electronic resources in that institution, while in a large research library, an ERL might be responsible for ER acquisitions alone, while others are responsible for access, administration, support, and evaluation. Therefore, the competencies required of an ERL will encompass a subset of the following:

1. Life cycle of electronic resources

The ERL has extensive knowledge of the concepts and issues related to the life cycle of recorded knowledge and information from creation through various stages of use to disposition* beyond that required of a generalist. The ERL understands the life cycle of electronic resources (see figure 1) in its ongoing complexity of multiple stages and processes. This broader understanding is essential as a foundation in order for anyone to be prepared to work with and act as a bridge across the multiple units/departments involved in electronic resources management in information organizations.

The ERL has

1.1 Thorough knowledge of electronic resource acquisitions, particularly managing electronic resources budgets, encumbrances, integrated library system (ILS) acquisition module functions, split funds and other accounting situations particular to acquisition of journal packages that may not have a single discipline in common, service and lock in charges, and adjusting for discrepancy between fiscal and calendar year accounting.

1.2 Thorough knowledge of electronic resource licensing and the legal framework in which it takes place. Since licenses govern the use of most library electronic resources and have conditions that cannot knowingly be violated, an ERL with responsibilities related to licensing must demonstrate familiarity with how and for whom an organization licenses content, as well as the concepts, implications, and contract language pertaining to such issues as archival rights, perpetual access and interlibrary loan. A practical working understanding of issues such as copyright and fair use will allow ERLs to obtain the least restrictive, most library-friendly licensing terms during publisher/vendor license negotiations.

1.3 The ability to apply the principals involved in the organization and representation of recorded knowledge and information* to the organization of electronic resources in order to select and provide access points that are useful to the communities they serve. In particular, an extensive knowledge of metadata, particularly the systems of cataloging, indexing, and classification used to organize recorded knowledge and

information (descriptive metadata) but also structural metadata and administrative metadata (including rights management and preservation metadata).

1.4 Experience with bibliographic and other utilities used to record that metadata; knowledge of CONSER guidelines and continuing resource cataloging principles; awareness of best practices related to RDA/FRBR.

1.5 A thorough understanding of records management necessary for actively coordinating and managing the often-complicated records needed to track electronic purchases, subscriptions, access set-up and maintenance, and licenses.

1.6 A commitment to maintain awareness of Open Access publications as they relate to the electronic resource management field.

1.7 A commitment to maintain awareness of trends and ongoing developments in areas related to the entire life cycle of electronic resources.

Figure 1. Electronic Resource Life Cycle (Pesch, 2009)

2. Technology

Providing and maintaining access to electronic resources is a primary responsibility of ERLs. It requires theoretical and practical knowledge of the structures, hardware, and software underlying the provision of access to electronic resources, and their interrelatedness. This includes but is not limited to information, communication, assistive, and related technologies as they affect the resources, service delivery, and uses of ERs in libraries and other information agencies.* The ERL's depth of knowledge far surpasses the generalists' depth of knowledge of technology.
The ERL should:

2.1 Have conceptual and practical knowledge of computing hardware and mobile devices used to access electronic information and their operating systems.

2.2 Have conceptual and practical knowledge of networking technologies (both wired and wireless).

2.3 Have conceptual and practical knowledge of standards, protocols, and structures such as
- Internet protocols (IP) and file transfer protocols (FTP),
- OpenURL/z39.50,
- Central authentication services (Shibboleth),
- EZproxy,
- Electronic data interchange (EDI),
- Open Archives Initiative – Protocol for Metadata Harvesting (OAI-PMH).

2.4 Have conceptual and practical knowledge of database design.

2.5 Have conceptual and practical knowledge of Markup languages (e.g. HTML, XML, wiki).

2.6 Have conceptual and practical knowledge of preservation tools.

2.7 Have conceptual and practical knowledge of software such as
- Link resolver software,
- Metasearch software,
- Data collection software,
- Discovery services,
- Electronic resources management software (ERMS),
- The administrative functions of proprietary databases,
- Bibliographic utilities.

2.8 Support digital scholarship through an understanding of
- Emerging digital preservation techniques and technology,
- Data visualization,
- Cloud computing,
- Text mining.

2.9 Have an understanding of the complex range of data generated by and related to electronic resources from the sources above, as well as vendor web sites and proprietary products, and how these data are interconnected or distinct.

3. Research and assessment

The ERL

3.1 Understands the complex range of data generated by and related to electronic resources from the sources in #1, as well as vendor web sites and proprietary products, and how these data are interconnected or distinct.

3.2 Has the ability to collect, analyze, manipulate, and provide meaningful interpretation of data using relational databases, spreadsheet and word processing programs, and other online tools.

3.3 Possesses a broad understanding (or ability to acquire such understanding) of the electronic resources subscribed to by the organization and the ability to examine and evaluate current and potential purchases in objective and user-centered ways (assessment).

3.4 Understands and uses established research methods including bibliometrics (for collection assessment) and systems analysis (for troubleshooting).

3.5 Understands and uses methods of assessing and evaluating the specifications, efficacy, and cost efficiency of technology-based products and services.*

3.6 Is able to identify the principles and techniques necessary to identify and analyze emerging technologies and innovations in order to recognize and implement relevant technological improvements.*

3.7 Is able to apply principles of data collection, analysis, and reporting by

3.7.1 Gathering usage data, tracking the relative cost per use, recommending cancellations and additions in response to curricular needs and budgetary constraints.

3.7.2 Monitoring publishers' and other vendors' pricing policies and package deals to identify possible alternatives to current subscriptions.

3.7.3 Writing reports as needed detailing the strengths and weaknesses of the local serials collection for disciplines' accreditation or program reviews.

3.8 Demonstrates problem solving, organization, and analytical skills and has an aptitude for detail-oriented work.

4. Effective communication

The ERL demonstrates effective communication by

4.1 Communicating effectively, promptly, and consistently, verbally and in writing, with a broad range of internal and external audiences: users, colleagues and staff, subscription agents, and vendors; the ERL must be able to tailor the message(s) to the circumstances and to the audience, as needed.

4.2 Synthesizing easy to understand summaries of complex and ambiguous phenomena. ERLs often serve as the library's liaison with external stakeholders such as vendors or institutional information technology staff.

4.3 Explaining and instructing clearly and concisely, when and as needed; rises above personal feelings and frustrations in order to provide the best possible services and resources to end users.

4.4 Demonstrating the ability to work collaboratively with other units and staff, establishing and maintaining effective working relationships.

4.5 Demonstrating the ability to frame situations according to others' perspectives to recruit assistance with troubleshooting from vendors, agents, consortium partners, IT support, student/faculty users, etc.

4.6 Recognizing the need for data, selecting appropriate data analysis methods and utilizing data (e.g. resource usage statistics) persuasively to inform decision making.

4.7 Making presentations that are clear and comprehensive.

5. Supervising and Management

The ERL

5.1 Demonstrates the capability to effectively supervise, train and motivate staff.

5.2 Demonstrates skillful project management, particularly the ability to initiate and complete projects in a timely and independent manner.

5.3 Evaluates existing procedures and workflows, revising or replacing them as needed to maximize efficiency and job performance; implements and manages workflows utilizing appropriate personnel.

5.4 Synthesizes concrete policy statements based on an awareness of local resources and best practices in electronic resource acquisition, collection development and systems.

5.5 Establishes and maintains effective working relationships.

5.6 Is familiar with systems administration through

> 5.6.1 Knowledge of system architectures, capabilities, support options, etc. for library systems involved in access and preservation of electronic resources.

5.6.2 Knowledge of best practices for account and data management (e.g. setting user permissions, performing regular backups, etc.).

5.6.3 Utilizing options for technical support as needed (e.g. vendor support, product-specific or librarian-related online bulletin boards/listservs, organization's IT department, knowledgeable colleagues and student assistants, etc.).

6. Trends and Professional Development

The ERL works with concepts and methods that are very much in flux, and so has an abiding commitment to ongoing professional development through continuing education, attendance at professional conferences, webinars, following related professional literature, blogs and listservs, and other learning venues.

The ERL is:

6.1 Committed to maintaining knowledge of current issues and trends in scholarly communication and the library's dual role as content access provider and content generator.

6.2 Committed to maintaining knowledge of current issues and trends related to licensing.

6.3 Knowledgeable about the legal framework within which libraries and information agencies operate. That framework includes laws relating to copyright, privacy, freedom of expression, equal rights (e.g., the Americans with Disabilities Act), and intellectual property.

6.4 Recognizes when standards (e.g. KBART holdings files) or best practices (e.g. SERU as a model for a new license agreement) are relevant to decisions about everyday workflows.

6.5 Educates colleagues and advocates for use of these agreed-upon conventions as needed.

6.6 Maintains extensive knowledge of the systems of cataloging, metadata, indexing, and classification standards and methods used to organize recorded knowledge and information* beyond that of a generalist.

6.7 Has extensive knowledge of digital tools, standards and initiatives, such as ONIX, SUSHI, OpenURL, and COUNTER.

7. Personal Qualities

The ERL demonstrates:

7.1 Flexibility, open-mindedness and the ability to function in a dynamic, rapidly changing environment. Flexibility is a crucial cognitive and affective attribute that operates on multiple levels. Within a single day an ERL may prioritize between various shifting tasks. Over the course of several years, the ERL needs to be responsive to changing systems and user needs (and their technical expertise often gives them the ability to influence the library's strategy for responding to these factors).

7.2 A high level of tolerance for complexity and ambiguity. Many aspects of ER work require the ability to recognize familiar patterns and also identify exceptions to the pattern (e.g. selecting the correct holding in an e-resource knowledgebase or troubleshooting an access outage).

7.3 Provides excellent customer service to a diverse population of users through a variety of communication methods.

7.4 Skillful time management. Much electronic resource work is very time-sensitive. An ERL must demonstrate the ability to plan and manage their own time and work assignments, and that of supervised staff, in order to make and meet deadlines consistently.

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From ALA's Core Competences for Librarianship

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