Training Course on E-resource Management and Licensing

Professional Development Training Course Outline

Category	Library Institute	**Duration**	10 Days
Base Fee	$3,000 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

In today's rapidly evolving information landscape, **electronic resources** (e-resources) have become the cornerstone of knowledge access and dissemination for libraries, academic institutions, and organizations worldwide. From e-journals and e-books to databases and streaming media, these digital assets offer unparalleled opportunities for learning, research, and innovation. However, effectively managing and licensing this vast and complex array of e-resources presents significant **challenges** including intricate vendor negotiations, evolving copyright laws, technical integration hurdles, and optimizing user access. Training Course on E-resource Management and Licensing is designed to equip professionals with the essential **skills and strategies** to navigate the complexities of e-resource management, ensuring seamless access, compliance, and maximizing the return on investment for digital collections.

This program delves into the entire **e-resource lifecycle**, from strategic selection and acquisition to efficient access provision, meticulous license management, and robust usage analysis. Participants will gain a deep understanding of **industry best practices**, explore cutting-edge **ERM systems**, and develop proficiency in **negotiation tactics** to secure favorable licensing agreements. Through practical case studies and interactive sessions, attendees will learn to overcome common pain points, streamline workflows, enhance user experience, and champion the value of their digital resources within their institutions. This course is vital for any organization seeking to optimize their digital library operations and ensure **sustainable access** to critical information in the digital age.

Programme Curriculum

Training Course on E-resource Management and Licensing

Introduction

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Course Duration

10 days

Course Objectives

1. Comprehend and implement the end-to-end lifecycle of electronic resources, from selection and acquisition to access, maintenance, and de-accessioning.
2. Analyze, interpret, and effectively negotiate complex **licensing terms and conditions** for digital content, ensuring legal compliance and optimal user rights.
3. Develop strategic approaches for **e-resource selection** and acquisition, aligning with institutional needs, budget constraints, and user demand.
4. Evaluate, select, and effectively utilize dedicated ERM platforms for streamlined workflows, data management, and operational efficiency.
5. Implement strategies for seamless **e-resource discovery**, including OpenURL, federated search, and knowledge base integration, to improve user experience.
6. Interpret and leverage **COUNTER-compliant usage data** and SUSHI protocol for informed decision-making on renewals, cancellations, and collection development.
7. Understand and apply **copyright law** principles and intellectual property rights in the context of digital content, mitigating legal risks.
8. Foster effective partnerships with **publishers and content aggregators**, mastering negotiation strategies and conflict resolution.
9. Implement best practices for **metadata management** and data integrity within ERM systems to support discoverability and access.
10. Develop robust **budgeting models** and cost-per-use analysis for electronic resources, demonstrating return on investment.
11. Explore foundational principles and emerging technologies for the **long-term preservation** of digital assets and licensed content.
12. Understand the benefits and complexities of **consortial licensing** and collaborative acquisition models for cost savings and expanded access.
13. Ensure electronic resources and platforms adhere to **accessibility standards** (e.g., ADA, WCAG) to serve diverse user needs.

Organizational Benefits

- Achieve significant cost savings through strategic negotiation, usage analysis, and identifying redundancies in subscriptions.
- Provide seamless and intuitive access to a wider array of high-quality digital resources, improving user satisfaction and research outcomes.
- Minimize legal and compliance risks associated with complex licensing agreements and copyright restrictions.
- Streamline e-resource workflows, reducing manual tasks and freeing up staff for more strategic initiatives.
- Utilize robust data and analytics to make evidence-based decisions on collection development, renewals, and resource allocation.
- Increase the visibility and discoverability of valuable electronic resources, maximizing their utility and impact.
- Empower institutions to develop a forward-thinking **digital content strategy** that aligns with evolving academic and research needs.
- Equip library and information professionals with the expertise and confidence to manage complex digital collections effectively.

Target Audience

1. Librarians and Information Professionals
2. E-resource Librarians.
3. Acquisitions Librarians
4. Collection Development Specialists
5. Library Administrators and Managers.
6. IT Staff Supporting Library Systems
7. Researchers and Academics
8. Publishers and Vendors

Course Outline

Module 1: Introduction to Electronic Resources and the Digital Landscape

- Defining Electronic Resources: Types, Formats, and Evolution.
- The E-resource Ecosystem: Publishers, Vendors, Aggregators, and Libraries.
- Key Trends Shaping Digital Collections and Access.
- Challenges and Opportunities in the Digital Age for Libraries.
- **Case Study:** Analyzing the shift from print to digital journal collections in a university library, identifying initial challenges and successes.

Module 2: The E-resource Lifecycle and Management Principles

- Overview of the E-resource Lifecycle: From Selection to Archiving.
- Core Principles of Effective E-resource Management.
- Understanding the Role of ERM Systems in Workflow Automation.
- Interdepartmental Collaboration for Seamless E-resource Operations.
- **Case Study:** Mapping the e-resource workflow of a mid-sized public library and identifying bottlenecks.

Module 3: Strategic E-resource Selection and Acquisition

- Needs Assessment and Collection Development Policies for E-resources.

- Identifying and Evaluating E-resource Content and Platforms.
- Budgeting and Financial Planning for Digital Collections.
- Trial Access Management and User Feedback Integration.
- **Case Study:** A research institution decides on a new science database; evaluating vendor proposals and trial feedback.

Module 4: Understanding E-resource Licensing Agreements (Part 1: Core Concepts)

- Introduction to Contract Law and Legal Terminology for Licenses.
- Key Clauses in E-resource Licenses: Authorized Users, Usage Rights, Perpetuity.
- Understanding Copyright, Fair Use, and Interlibrary Loan (ILL) within Licenses.
- Negotiation Fundamentals: Preparing for Discussions with Vendors.
- **Case Study:** Deconstructing a typical e-journal license agreement, highlighting common pitfalls and favorable clauses.

Module 5: Understanding E-resource Licensing Agreements (Part 2: Advanced Topics)

- Digital Rights Management (DRM) and its Impact on Access.
- Consortial Licensing Models and Benefits.
- Archiving and Post-Cancellation Access Rights.
- Open Access (OA) and its Implications for Licensing.
- **Case Study:** A library consortium negotiates a multi-year deal with a major publisher, focusing on shared access and cost implications.

Module 6: Vendor Relationship Management and Negotiation Tactics

- Building Strong Partnerships with Publishers and Vendors.
- Effective Communication and Dispute Resolution.
- Developing Negotiation Strategies: Leveraging Data and Market Intelligence.
- Renewals, Cancellations, and Price Benchmarking.
- **Case Study:** A library attempts to negotiate a significant price increase for a critical database, detailing their strategy and outcome.

Module 7: Implementing and Utilizing Electronic Resource Management (ERM) Systems

- Features and Functionality of Leading ERM Systems (e.g., Alma, EBSCO ERM, Coral).
- Data Migration and Integration with Existing Library Systems (ILS).
- Customizing Workflows and Reports within ERM Platforms.
- Best Practices for Data Entry and Maintenance in ERM.
- **Case Study:** A university library migrates their e-resource data to a new ERM system, outlining the challenges and successes.

Module 8: E-resource Access, Authentication, and Troubleshooting

- Authentication Methods: IP Authentication, Proxy Servers (EZproxy), Shibboleth.
- OpenURL Link Resolvers and Knowledge Base Management.
- Troubleshooting Access Issues: Common Problems and Solutions.
- Providing User Support for E-resources.
- **Case Study:** A user reports access issues to a specific e-journal; participants diagnose and resolve the problem using troubleshooting tools.

Module 9: E-resource Discovery and Promotion

- Optimizing Discovery Services (Discovery Layers) for E-resources.

- A-Z Lists, Subject Guides, and LibGuides for E-resource Promotion.
- Leveraging Social Media and Library Websites for E-resource Outreach.
- User Education and Training for E-resource Utilization.
- **Case Study:** A public library launches a campaign to increase awareness and usage of their newly acquired e-book collection.

Module 10: Usage Statistics Analysis (COUNTER & SUSHI)

- Introduction to COUNTER (Counting Online Usage of Networked Electronic Resources) Standards.
- Understanding Different COUNTER Report Types (e.g., JR1, BR1).
- Utilizing SUSHI (Standardized Usage Statistics Harvesting Initiative) for Data Collection.
- Interpreting Usage Data for Collection Development and Budget Justification.
- **Case Study:** Analyzing a set of COUNTER reports to identify underperforming journals and inform renewal decisions.

Module 11: Copyright, Intellectual Property, and Fair Use in Practice

- In-depth Review of Copyright Law and its Application to Digital Content.
- Understanding Fair Use and its Limitations for Educational Institutions.
- Navigating Digital Millennium Copyright Act (DMCA) and Anti-Circumvention.
- Managing Copyright Permissions and Licensing for Course Reserves.
- **Case Study:** A university instructor wants to use a chapter from an e-book for a course reserve; participants determine copyright implications and necessary permissions.

Module 12: Digital Preservation of Electronic Resources

- Challenges of Long-Term Access and Preservation of Digital Content.
- Strategies for Digital Preservation: LOCKSS, Portico, Institutional Repositories.
- Role of Persistent Identifiers (DOIs, PURLs) in Digital Longevity.
- Developing a Digital Preservation Plan for Licensed Content.
- **Case Study:** A historical society considers how to ensure continued access to a unique collection of digitized local newspapers in the long term.

Module 13: Emerging Trends and Technologies in E-resource Management

- Open Access Movement and its Impact on Licensing.
- Big Data Analytics and Predictive Modeling for Collection Management.
- Artificial Intelligence (AI) and Machine Learning in E-resource Discovery.
- Blockchain and Distributed Ledger Technologies in Licensing.
- **Case Study:** Discussing the potential implications of a widespread shift to "read and publish" agreements on traditional licensing models.

Module 14: E-resource Accessibility and Inclusion

- Understanding Web Content Accessibility Guidelines (WCAG) and ADA Compliance.
- Evaluating E-resource Platforms for Accessibility Features.
- Strategies for Ensuring Equitable Access for All Users.
- Working with Vendors to Improve Accessibility of Their Products.
- **Case Study:** A visually impaired student reports difficulties accessing a required e-textbook; participants identify solutions and advocate for improvements.

Module 15: Future of E-resource Management: Strategic Planning and Advocacy

- Developing a Strategic Roadmap for E-resource Services.
- Advocating for Resources and Staffing for E-resource Management.
- Measuring and Communicating the Value of E-resources to Stakeholders.
- Building a Culture of Continuous Learning and Adaptation in E-resource Management.
- **Case Study:** A library director prepares a presentation to university administration to request increased funding for e-resources, using data and strategic priorities.

Training Methodology

This training course will employ a dynamic and interactive methodology to ensure maximum engagement and practical skill development. Approaches will include:

- **Expert-Led Presentations**: Concise and informative sessions delivered by experienced e-resource professionals.
- **Interactive Workshops**: Hands-on exercises and group activities to apply concepts learned.
- **Case Study Analysis**: In-depth examination of real-world scenarios to develop problem-solving skills.
- **Group Discussions and Peer Learning**: Opportunities for participants to share experiences and best practices.
- **Q&A Sessions**: Direct engagement with instructors to clarify doubts and explore specific challenges.
- **Practical Demonstrations**: Live walkthroughs of ERM systems, usage statistics platforms, and negotiation tools.
- **Resource Kits**: Provision of templates, checklists, and recommended readings for continued learning.
- **Role-Playing Exercises**: Simulating negotiation scenarios to build confidence and refine communication skills.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call *+254769199797*

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	04 Dec 2026	Online	$2,000
23 Nov 2026	04 Dec 2026	Physical	$3,000
23 Nov 2026	04 Dec 2026	Physical	$6,000
23 Nov 2026	04 Dec 2026	Physical	$6,000
23 Nov 2026	04 Dec 2026	Physical	$12,000
23 Nov 2026	04 Dec 2026	Physical	$9,000
23 Nov 2026	04 Dec 2026	Physical	$12,000
23 Nov 2026	04 Dec 2026	Physical	$12,000

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