

## **E-Reserves in Transition: Exploring New Possibilities in E-Reserves Service Delivery**

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### **ABSTRACT**

Nearly all academic libraries offer course reserves and most have long considered it a core library service. However, expanding use of course management systems in academia have opened new opportunities for libraries interested in exploring changes to electronic reserves services. Budget constraints and staffing shortages have also led several institutions to consider eliminating or modifying their e-reserves operations. Potentially difficult challenges, however, also accompany making significant changes to often well-established practices.

This environmental scan of selected academic libraries across the United States discusses institutions which have maintained the status quo in e-reserves services, as well as those who have changed or discontinued these services. The article also provides insight on why some of the latter decided to make these changes.

### **Keywords**

- Reserves
- Course reserves
- e-reserves
- Electronic reserves
- Course management systems (CMS)
- Technology

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## **Introduction**

Nearly all academic libraries in the United States offer course reserves. Most have long considered it a core library service that supports teaching and learning. Recently, expanded use of course management systems (CMS) and other technologies in academia have presented new challenges and opportunities for libraries providing electronic reserves services. At the same time, budget constraints, staff shortages, and a handful of recent high-profile legal cases have led several institutions to implement modifications to existing e-reserves operations or to consider their elimination. Given these conditions, the current environment for academic e-reserves is one that appears to be in the process of significant change.

Providing short-term loans of print material to students enrolled in a course has been the practice of college and university libraries since the early twentieth-century (Seaman, 1996). This well-established and heavily used service began to take on a new look in the early 1990s as academic libraries across the country, beginning with San Diego State University (Bosseau, 1993), embarked on projects that migrated existing print-based collections onto electronic platforms. Made possible by improved network technologies and software solutions and driven by increased user demand for 24-hour access to high-demand materials, electronic reserve projects proliferated throughout the decade. By the end of the 20<sup>th</sup> century, a large number of academic libraries provided e-reserves services (Kristof, 1999), in conjunction with reserves for traditional print collections.

Throughout this period of growth, concerns about different types of appropriate technologies, workflow and processes, integrating e-reserves into library catalogs, promotion and marketing e-reserves, and issues relating to copyright compliance surfaced. While many questions surrounding library administration of digital course content mounted on secure servers have been resolved, others have not. According to Bridges (2007) practices “vary widely and are influenced by institutional organizational structures, the information and technology infrastructure, manpower, demand, and the copyright law” (p. 317). With the rapid increase in CMS on college campuses, the mechanisms and practices for delivering course-integrated, electronically-licensed library materials take on new levels of complexity. Additional areas of concern include proper handling of emerging new media formats (Eng, 2006), as well as recent legal activity at Cornell University (Bridges, 2007) and Georgia State (Albanese, 2008).

In an effort to understand the present landscape of electronic reserve services in academic libraries, an environmental scan was undertaken in early 2010. Informally polling both Association of Research Libraries (ARL) and non-ARL institutions, results provide interesting insight into college and university libraries’ e-reserve operations. While some are maintaining or expanding existing programs, others are considering significant changes to the status quo, including discontinuation of these services.

### Literature Review and Background

Electronic reserves have long been a topic for discussion in the professional literature. For a general overview, Austin (2001) and others provide an account of the history and development of e-reserve programs in the U.S., especially in connection to copyright law (Loring, 1997; Seaman, 1996). Several monographs and numerous articles have appeared during

the past decade describing various issues, challenges, and benefits of implementing, managing, and marketing individual e-reserve programs (Blakenship, 2009; Dawes, 2006; McCaslin, 2008).

In 1999, ARL issued SPEC Kit 245 *Electronic Reserves Operations in ARL Libraries*. At that time, a majority of respondents offered either full-scale electronic reserve services or were in the process of implementing them. Based on this survey, Kristof (1999) indicated that electronic reserves were “a popular, successful initiative at ARL libraries and its development is expected to continue.” (p. ii).

More recently, the appearance of a series of articles describing a changing electronic reserves environment have emerged. Drew (2007), Oliver (2008), and Poe (2007) are among a growing number of librarians looking specifically at the connection between e-reserves and course management systems.

Because of significant changes in the electronic reserves environment, and to update the 1999 survey of ARL e-reserves operations, an inquiry was posted to several listservs, yielding responses and discussion from reserves staff at a wide variety of campuses. While the majority of institutions responding to the survey continue to offer both print and electronic reserve services, the subsequent discussion generated by the questionnaire also points to new possible directions. Interestingly, the models that are emerging reflect the three futures imagined as early as 2004 (Austin). It may be too early to predict a demise of electronic reserves services (Albanese, 2007; O’Hara, 2006), but it is clear that librarians are beginning to think about e-reserves differently.

## **Methodology**

In early 2010, one of the authors conducted an informal environmental scan of e-reserves services across primarily academic institutions to get a general sense of any changes taking place in this area of library operations. The project was intended to capture anecdotal examples and insights across the spectrum of e-reserve services, and to provide a snapshot, though not necessarily a comprehensive one, of the e-reserves environment in early 2010. Posting an open inquiry to several listservs<sup>i</sup> yielded numerous responses from reserves staff at ARL and non-ARL campuses, as well as enthusiasm and interest from listserv membership. In total, 20 institutions responded to the initial inquiry, including 12 ARL libraries. Information was gathered from the reserves web sites of 96 remaining ARL libraries.<sup>ii</sup> In April 2010, the executive summary of the scan was shared with the listservs, again to appreciation and interest. Thereafter, the second author joined the effort to compose an article to elaborate on the environmental scan results in order to share greater detail with a wider audience.

## **Analysis**

Most of the institutions surveyed have not made significant changes to their reserves operations and continue to offer what might be considered a traditional service, offering both physical and electronic reserves. Nine libraries have eliminated or are considering discontinuing e-reserves processing from the library, with various impacts on the library and the institution.

In terms of e-reserves, availability of a course management system (CMS) provides additional flexibility for both instructors and the library. As a result, a wide range of hybrid models has emerged. Many of the libraries featured in this article continue to process e-reserves, but also encourage and instruct faculty with e-reserves tasks that faculty can do themselves. Another large set of institutions allows instructors to choose whether to have the library post e-

reserves materials in the library's system (whether online catalog or e-reserves system), the campus-wide CMS, or both. Staff in another set continues to process e-reserves, but posts materials only in the CMS. Examples of each type of service will be further described in this article.

Only one library, at the University of Arizona, reported eliminating physical reserve services. Nearly all other institutions reviewed cite physical reserves as a continuing core service. For this reason, e-reserves, rather than physical reserves, are the focus of this scan.

Among the institutions surveyed in this project, Docutek ERes from Sirsi-Dynix and Ares from Atlas Systems were widely used e-reserves systems. Course management systems, also called online collaboration and learning environments, in use include Blackboard, WebCT, SmartSite, Angel, and DesireToLearn (D2L), with Blackboard being the most heavily used. Moodle is also appearing at a few campuses, the University of California at Santa Barbara and North Carolina State University among them. Sakai, an open-source, online collaboration and learning environment, is also in use at such campuses as Indiana University Libraries Bloomington, University of California at Davis, and University of Virginia Library.

### FULL SERVICE

Of the institutions included in the scan, nearly 40 can be identified as adhering in both philosophy and methodology to a full-service model. These institutions continue to offer e-reserves without significant recent changes to their policies or practices. In one version of this model, the library remains at the center of the reserves process, providing full service from beginning to end – receiving requests by faculty to post materials; seeking copyright permissions; paying royalties and other fees; using library software and hardware to scan, edit,

and post to library server space; and archiving or deleting files from the server when the reserve period is over.

In most cases, these full service e-reserve programs are well-marketed, customer-centered, popular, and heavily used by both faculty and students (Jacoby, 2004). The library retains control of the entire e-reserves process, ensuring that copyright is followed and that adequate safeguards are in place for quality control and access. The library also assumes the costs of staff, permissions, and equipment related to e-reserves. A selective list of status quo libraries includes those at Columbia University, Florida State University, Georgia Institute of Technology, University of California at Los Angeles, University of Florida, University of Houston, University of Illinois at Urbana-Champaign, University of Massachusetts Amherst, University of Notre Dame, Washington University in St. Louis, and Yale University.

### SELF-SERVICE

At the opposite end of the spectrum, at some institutions, making course content available to students has become an entirely self-service operation, with faculty members assuming full responsibility for the management of materials within a campus or institutional CMS space. In this model, individual faculty or other academic support units outside the library are responsible for placing supplementary reading material into individual course spaces, generally using campus-wide course management systems, which include Sakai, Blackboard, WebCT, Angel, Desire2Learn, SmartSite, and Moodle. In these cases, non-library entities do their own scanning, posting, permissions, maintenance, and archiving – managing the reserve material's life-cycle from beginning to end.

In this survey, some libraries indicated that they no longer offer any type of electronic reserves service, while others mentioned considering or investigating moving in this direction.

As one of the first to provide e-reserves, San Diego State University's (SDSU) decision to eliminate the service from the library at the end of the spring 2010 semester is noteworthy.

Recognizing duplication of efforts between the library and instructors already heavily investing in Blackboard, and needing to accommodate budget limitations, library administration at SDSU decided to discontinue the e-reserves service (S. Baird, personal communication, March 19, 2010). Similarly, the University of Michigan Library "made the change to eliminate its stand alone e-reserves service in the fall of 2009" (A. Beaubien, personal communication, March 13, 2010).

The University of California, Berkeley Library (UCB) eliminated both of its separate e-reserves systems in recent years: ERes in 2007 and CourseWeb in 2008. The UCB library helped instructors transition from Blackboard, to bSpace, UCB's implementation of Sakai, which offered more course management options. Though the number of courses ERes supported in the 3 years prior to its elimination was substantial, volume was decreasing as CourseWeb and Blackboard were introduced. The library decided that activity in ERes was not high enough to justify keeping, upgrading, and maintaining it (C. Rubens, personal communication, March 15 and April 14, 2010). Despite some hand-holding with a small number of instructors who were long-time users of the former ERes, library staff report that the transition has worked well and they are happy with the decision to move to Sakai.

The Head of the Reserve Service Department at the University of California at Davis (UCD) Shields Library also shared details about its experience recently discontinuing e-reserves



services from the library (F. Bryan, personal communication, March 12, 2010). UCD's use of the SmartSite course management and collaboration system enables its instructors to create and store course-related materials online. In the Fall of 2009, the UCD library discontinued scanning and providing e-reserves for faculty, so that the vast majority of e-reserves tasks are no longer performed in the library. However, if a faculty member wants to place an article on e-reserve in a journal to which UCD subscribes electronically, library staff can provide a link to the article on the reserve page within the course. Faculty may also scan their own materials and place them in their SmartSite course pages. Beyond the persistent links provided by the library, UCD faculty is responsible for loading their own electronic content to SmartSite. A campus-wide SmartSite support unit, rather than the library, assists instructors in establishing and managing SmartSite accounts. A staff member at Shields Library offered that this transition of tasks to instructors "was not always a comfortable process" (J. Newborn, personal communication, March 12, 2010).

Though not an ARL institution, the Head of Access Services for the Oregon Health & Sciences University (OSHU) Library shared that they worked with faculty to move e-reserves to the CMS, Sakai, by the end of June 2010. She explained that although the library was satisfied with Docutek, the parent institution mandated the use of single source software, in this case Sakai, which is supported by the Academic Technology unit (J. Norton, personal communication, March 14, 2010). As noted on the library's blog on March 8, 2010, ERes would no longer be available after June 15, 2010, the date on which all course materials were removed. The library encouraged faculty to contact Academic Technology staff to establish a course page, welcomed them to work with library staff to ensure successful transfer of items from ERes to Sakai, and recommended that faculty begin transferring files in the spring 2010

term in preparation for sole use of Sakai beginning on July 1, 2010. The blog further explained that many instructors had already transitioned course documents to Sakai and were pleased with the enhanced options and display capabilities it offered (Oregon). Staff explained that the unit backed up all course material before shutting down library reserves, anticipating that some users might overlook the deadline. Three faculty and two students contacted them to request course materials during July 2010, which they were able to supply. Since staff has not been contacted since then for this purpose, they plan to delete the backups in early 2011 (J. Norton).

The University of California at Santa Cruz (UCSC) library is phasing out its electronic reserves service, noting that the service is still provided on campus, but not by the library (S. Troy, personal communication, March 12, 2010). The UCSC library's notice to patrons about changes to its Eres services provides a timeline for these transitions (Nobles, 2010). Beginning in the fall quarter of 2010, e-reserves was offered through UCSC's new Education Commons & Collaborative Learning Environment and use of Docutek's ERes was discontinued. Scanning and posting of documents continued through the fall quarter, and the library's Reserves Department stated it would "work closely with instructors to teach them how to directly manage their course materials and resources, in order to prepare for winter and spring service changes." For the winter 2011 term, "hard-copy material will continue to be scanned and posted in eCommons," though the Reserves Department would no longer post material that is electronically delivered. "The department will continue to work closely with instructors to ensure they have resources available to them to successfully manage their course materials in the CMS. By the spring 2011 term, the library Reserves staff "will no longer post course material. Scanning of hard-copy material will continue, but all documents will be e-mailed to the instructor for posting once they have been scanned." The Reserves Department, however, will offer CMS referral support during

this time, though after Spring 2011, the unit will no longer offer any ERes-related services and all scanning and posting of course material will be managed by instructors (Nobles, 2010).

### HYBRID SERVICE

Between these two balance points – full service and self-service – a range of hybrid models has also emerged. Some libraries have recently eliminated at least part of the e-reserves processing workflow from the library, yet continue to provide limited support for e-reserves services in various places along the processing chain. In this diverse category of new hybrid models, numerous institutions employ a CMS and combine its use with that of library e-reserves. Examples or elements of hybrid models include:

#### **1. LIBRARY FOCUS:**

1a. Library performs the majority of e-reserve processing, but either requires or encourages faculty to perform some aspect of the work, which may include copyright permission or payment, scanning or otherwise copying documents, or posting links in a course management system.

1b. Library allows instructors to choose where the library posts e-reserves materials: In the library catalog, the library e-reserves system, or the campus CMS.

#### **2. NON-LIBRARY FOCUS:**

2a. Library does minimal processing of e-reserves items, with instructors performing more e-reserves-related tasks and having greater autonomy with, responsibility for, and control over their course materials.

2b. Library may provide some level of instruction to faculty on how to perform e-reserves processing tasks.

2c. E-reserve materials are posted exclusively in a campus-wide CMS.

2d. Also within the non-library focus, another alternative to instructors assuming responsibility for some e-reserve processing tasks is for another library or campus unit to perform some of this work, either in cooperation with or instead of the instructors.

## **1: LIBRARY FOCUS**

Numerous examples can be found of campuses at which e-reserves processing has been partially eliminated from the library, typically moving to CMS use instead, but at which the library still offers some support, the University of Missouri-Columbia and North Carolina State University among them. Also in many of these cases, the library continues to handle at least part of the e-reserves process, typically posting materials directly into a CMS, but also instructs and encourages (though does not require) instructors to perform various e-reserves processing tasks themselves. Such tasks might include scanning materials, linking scanned materials from a library reserves system to CMS course pages, and/or linking directly within CMS course pages to licensed electronic full-text content. Dartmouth University, Emory University, George Washington University, Indiana University Libraries Bloomington, McGill University, and Michigan State University also fall into this category.

The Cornell University Library provides e-reserves through Blackboard, offering three levels of service. In the first level, the library scans materials and creates links to online resources, sending the e-files and links sent to the instructor to upload into Blackboard. In a second option, the library scans materials, create links, and links to the instructor's in-library reserve list from the Blackboard course site, once the library is authorized as a Course Builder for the instructor's site. A final choice allows the library to create and manage an instructor's Blackboard site for a course. In this option, the library scans materials, creates links,

uploads files, manages enrollment, and cleans up site at end of term, again, once authorized as a Course Builder for the site (Cornell).

The vast majority of faculty at the University of Guelph makes use of the library's e-reserves services rather than doing this on their own, though an element of self-service exists, as instructors create their own course lists and add their own items within the library's Course Reserve management system, Ares (H. Martin, personal communication, December 7, 2010). Instructors may contact the E-Learning Operations and Reserve Services unit for assistance with the following e-reserves tasks: Converting traditional course reserve lists to electronic format, obtaining and paying for copyright permission to use electronic format materials in courses, providing electronic content that can be integrated directly into a CMS or course web sites, providing stable links to full text e-journal articles or e-books, and copyright and licensing issues in support of teaching and research. While library staff is happy to provide support to faculty who opt to post their own course materials instead of using eReserves, they encourage instructors to use the eReserves service as a way of managing copyright issues and freeing instructors from that responsibility (H. Martin).

The University of Waterloo Library provides e-reserves services, and also creates persistent URLs to already licensed electronic materials, embedding proxy server information into the URLs for automatic authentication for off-campus users, and seeking and paying for copyright permission for materials not available digitally, and scans and post materials. The Ohio State University Libraries do not require instructors to already be using Carmen, the campus CMS, prior to using the e-reserves service. "Instructors and teaching staff using Carmen and even those who do not use Carmen can submit eReserve Content for use in their Carmen

course. eReserves staff can "activate" a course and can add eReserves CONTENT to any course in Carmen" (Ohio).

The University of Alberta Libraries offers a Reading List service through which instructors may submit lists of readings to the library. The reserves staff searches the library's electronic collections and returns the list to the instructor, noting persistent URLs for the materials for the instructor to link to the CMS.

The University of Wisconsin–Madison Libraries use a home-made system called Library Course Pages (LCPs) to provide both e-reserves readings and other library-related course and instructional content (C. Nelson, personal communication, December 15, 2010). Library Course Pages may contain electronic reserves links; a link to a list of print library reserve materials for the class; links to research tools, databases, and web sites; tips for conducting library research; information on RefWorks; and contact information for appropriate librarians. In this way, students in courses with both e-reserves and library instruction content view the materials in a single, restricted-access location. Students typically link to the LCPs for their courses from a secure, personalized campus page which show related to their classes. Additionally, the campus uses several different CMS for regular course content. While library staff does not insert e-reserves readings into the CMS, they do arrange for links to the LCP page to appear within CMS class pages.

While its print reserves service will continue, especially given its escalating use, the University of California at Santa Barbara (UCSB) library is considering reducing or eliminating its e-reserves service, reconsidering the way it offers e-reserves, and investigating opportunities offered by a course management system. Noting the timeliness of this discussion on the listserv, the Head of Access Services explained that the UCSB Library is "currently working with the

College of Letters & Science in supporting campus instruction through its course management system (Moodle).” Scheduled for a soft roll out in early 2011, the process of making this change and switching users from the ERes/Docutek system to Moodle should be completed by fall 2011. The library will continue to have a hand in providing e-reserves in a very big way but through a new storefront – Moodle. There still are many issues to work out between all stakeholders on this endeavor but it’s seen as a good opportunity for the Library.

(G. Johnson, personal communication, December 16, 2010).

Several institutions offer flexibility to instructors by either posting reserve materials within the campus CMS, in the e-reserves system or sometimes OPAC, or both. The libraries at the University of Nebraska–Lincoln and Pennsylvania State University place items on electronic reserves web pages, but also encourage instructors to link to the materials or reading list from within their CMS course sites. The Stony Brook University (SUNY) Libraries also processes e-reserve materials and encourages instructors to link to the items within Blackboard. Alternately, instructors may give course-builder authority to the SUNY library to do so. E-reserve materials through the Northwestern University Library can be placed on reserve either through Blackboard or the library’s e-reserve system.

## **2: NON-LIBRARY FOCUS**

Several libraries, including those at McMaster University, Princeton University, SUNY Stony Brook, and Pennsylvania State University, offer guidance for instructors on the library web pages on how instructors may link directly from CMS course pages to licensed electronic content. The Indiana University Libraries (Bloomington) regularly offers short training sessions for instructors on placing materials on its e-reserve system (Docutek) and posting them to UI’s Sakai-powered online collaboration and learning environment.

The Wayne State University Libraries encourages instructors to link to e-reserve from within Blackboard and provides instructions on how faculty can link to already licensed electronic content. With its library's encouragement of self-service among instructors, University of New Mexico faculty can link to online resources provided by the UNM University Libraries, or add their own materials by scanning and uploading files themselves.

In a unique example, the University of Texas Libraries offers another hybrid model in which the library has an oversight role, while instructors place material on reserve and manage and control their own e-reserve materials. Libraries staff are responsible for maintaining the electronic reserves software and server. While instructors are responsible for placing course materials on e-reserve, library staff may limit the number of electronic reserve items which can be posted for each course to accommodate space constraints on the reserves server. Instructors can link to online resources provided by the library, or add their own materials by scanning them, uploading them from their hard drives, or FAXing them directly into the system (Texas).

One element of hybrid models is the possibility of the library bringing responsible for providing instruction to faculty on how to perform various e-reserves processing tasks. According to its web site, staff at the University of Texas Libraries is responsible for "issuing electronic reserves accounts to instructors and training instructors to use the software." Likewise, the North Carolina State University Libraries offers full-service e-reserves, through which library staff accepts material from instructors and place it online for them, as well as self-service for those faculty choosing to take advantage of ReservesDirect's DIY options (T. Reade, personal communication, December 9, 2010). The library also provides extensive guidance to facilitate instructor self-service, including offering numerous Camtasia videos to teach instructors how to use the reserves service (see <https://reserves.lib.ncsu.edu/>). Available videos



fall into various categories: Using reserves, adding materials, organizing your reserves materials, and reactivating your reserves and managing access to your reserves. Instruction also includes how to add a freely available online article to a reserves list and how to create stable links to reserves items. The library site also offers guidance to instructors on connecting to the learning management systems (Blackboard Vista and Moodle).

The University of Missouri–Columbia Libraries offers detailed information for instructors on how to perform a wide variety of tasks within the e-reserves system (ERes), including applying for an eRes account; creating or customizing a course reserves page in the system; archiving reserves pages; adding documents through linking, scanning, FAXing, or associating an existing document to a course reserves page, and more. The University of Iowa Libraries also posts items in the CMS and instructs teaching staff how to give library reserves staff the required access to their CMS sites. Upon eliminating its e-reserves service following the spring 2010 term, San Diego State University library faculty and staff also implemented a major initiative to inform and educate faculty on how to link to its licensed online content.

When asked if the library no longer participates in any way in offering or processing electronic reserves, with the exception of providing copyright compliance and related information on its web pages for faculty use, Brandeis’ Reserves Coordinator confirmed that “the library no longer offers direct e-reserve services and expect faculty to scan, upload and/or link their documents in the CMS themselves. We offer training and support to faculty in those tasks.” (A. Scanzani, personal communication, April 27, June 11, and December 15, 2010). Brandeis University library directs instructors to use the campus CMS and provides detailed instructions for them on how to do so. One set of instructions on its information for faculty page outlines how to link to e-books, e-book chapters, and online articles the campus owns or licenses.

Instructors may upload and store electronic files in their courses within the CMS, and the library's web site offers instructions on how to work with files in the campus online learning environment. Copyright guidelines are also provided for instructors. Library reserves staff is not involved in e-reserves processing for books and articles, but Library & Technology Services and Reserve staff are involved in investigating and supporting the purchase of streaming video and audio for use in the CMS (A. Scanzani).

Examples of campuses where library performs processing, but posts materials only within the CMS include Georgetown University, Harvard University, Syracuse University, The Ohio State University, University of Louisville, University of Oregon, University of Rochester, University of South Carolina, University of Virginia, University of Waterloo, and Vanderbilt University, among others. Similarly, as of the Fall 2010 term, Blackboard is the primary method of accessing the library's electronic reserves (ERes) system for students at Johns Hopkins University (JHU). Each JHU course has a companion website in Blackboard, and each course site includes a link to ERes (Johns).

Further streamlining access to e-reserves materials, Michigan State University Libraries staff process e-reserves, but access to the materials is provided solely through the CMS. The Massachusetts Institute of Technology Libraries also continues to offer reserves services, but places all electronic materials into the course management system, requiring that an instructor have a page for the course in the CMS in order to have readings available electronically. The MIT library site links to the CMS course site creation form, and library staff may sometimes assist instructors in use of the CMS or copyright policies, but the library does not manage the CMS. Furthermore, readings are scanned and uploaded to the course site only when the fair use provisions of the copyright law allow. When this isn't the case, the reading is placed

instead on print reserve in the appropriate library. (C. Quirion, personal communication, December 21, 2010).

As additional examples, the University of Chicago Library processes both print and electronic reserves, but posts materials in the learning management system, which is supported by the campus' Information Technology Services department. Likewise, the Cornell University Library and University of Iowa Libraries post e-reserves materials into their respective CMS. While the University of Maryland Libraries posts electronic reserves to Blackboard, to realize faster turnaround time, faculty may also upload materials themselves, pending a brief copyright review by reserves staff.

Upon request by instructor's using Blackboard, University of Pennsylvania library staff scan reserve materials and make them available under the Course Documents section of a Blackboard course. Librarians also provide additional support for Blackboard courses, such as providing links to key databases, creating tutorials on particular research tasks, or developing course guides outlining major reference tools and primary sources.

Finally, the University of Kansas Libraries made significant changes to its course reserves services in the fall of 2009, with access to e-reserve materials provided solely through Blackboard, its centralized, campus-wide CMS. The Libraries continue to offer physical reserves services, but with the Document Delivery and Interlibrary Loan unit providing scanning upon request, which are turned over to instructors for posting in course pages. Instructors are also encouraged to link directly to licensed content. The campus Instructional Development and Support (IDS) unit handles support and assistance in using the CMS system (S. Kanning, personal communication, December 7, 2010).

In another example of reallocating e-reserves tasks within the library, the University of Arizona Library formally discontinued its physical course reserves services in July 2009. The Libraries' alert to its faculty users stated that as of July 10, 2009, "students will no longer be able to access course materials through the Library's ERes database" (Arizona), recommending that instructors instead place course materials on a course site within its CMS, Desire2Learn (D2L). However, the library continued to digitize journal articles, book chapters, audio selections, and video for online course access through its Express Document Delivery Service, which provides free electronic delivery of articles, book chapters, and streaming video for use in courses. The library also offers guidance for instructors on how to load electronic content into D2L. Additionally, while scanned materials are accessed via the CMS, instructors may also create, or work with a librarian to create, a Library Resource Organizer page (course guide) to outline numerous other library resources of likely interest to students in a class (Arizona).

Now offering reserve materials electronically, the University of South Carolina Libraries is "partnering with University Technology Services using the new Content System module in Blackboard, enabling instructors to access their reserve information in the Content System and easily move it into their courses in Blackboard." The library still scans library materials and addresses copyright concerns connected to posting these materials for instructors who submit the e-reserves form. The library also lists copyright guidelines and offers to "scan or link to copyrighted materials for placement on electronic reserve without obtaining copyright permission so long as they do not exceed the guidelines listed" (South Carolina). Alternately, the library will seek copyright permission through the Copyright Clearance Center for materials falling outside of fair use rights, so long as the amount is not exceedingly high (T. Taylor, personal communication, December 10, 2010).

## **Why are campuses choosing to move e-reserves out of the library?**

A wide variety of reasons appear to be driving transitions in e-reserves services, including budget constraints on the library, availability of tools like the CMS which can facilitate some e-reserves tasks, self-service for instructors who want that freedom, and easier, consolidated access for students. As noted by previous examples, many institutions now use or are beginning to use the CMS more fully, and as faculty comfort with this technology increases, the opportunity for the library to take fuller advantage of the CMS likewise increases, whether the library posts materials into the CMS or expects the faculty to do more of the work themselves. Other campuses specifically mention budget difficulties and financial constraints being the driving force behind their investigation of change. Another advantage of moving to this model is cost savings for the library in terms of staff time, permission fees, and equipment usage/replacement. The University of Arizona Library outlined several reasons for eliminating its ERes database, stating that “D2L protects copyright, provides all course material in one location, eliminates duplication of services, and allows students and faculty to use their UANetIDs instead of a different password (Arizona).” When announcing changes to e-reserves services at UC-Santa Cruz, the library’s Reserves Coordinator explained the need for the changes this way: “In order to support the campus' goal of providing a consistent user experience for the entire campus learning community and eliminate costly duplicative services, the University Library's Electronic Reserve service will be undergoing several changes over the 2010-2011 academic year” (Nobles, 2010).

## **Benefits to Moving e-Reserves out of the Library**

### **1. Saving money within the library**

Though budget cuts varied across the 10 University of California (UC) campuses, “the overall reduction to the combined UC Libraries budget for 2009-2010 was \$37 million (-13%). Further significant cuts (up to 20% in some cases) are anticipated over the next two years (through 2011-2012) (California).” To adapt and persevere through these widespread financial difficulties, many institutions are investigating and implementing ways to save money, including eliminating duplicative or lower priority services or transforming workflows to lead to greater efficiencies. Among libraries discontinuing e-reserves, or considering doing so, as a result of budget constraints are the University of California campuses at Santa Barbara and Santa Cruz and San Diego State University.

Despite SDSU’s long history with its popular e-reserves service, its former Reserve Book Room Supervisor explained that the decision to discontinue e-reserves was definitely budget driven, especially with regard to staffing (S. Baird, personal communication, March 19, 2010). Financial issues also contributed to the move from Docutek to use of a CMS for course reserves at Oregon Health & Sciences University library. According to its blog post, “The decision to eliminate ERes was a difficult one. ERes is easy and intuitive to use. However, due to the recent budget challenges, it no longer made sense to support two systems. Since Sakai provides much more functionality than ERes, the decision was made to continue with Sakai” (J. Norton). The Reserves Coordinator at Brandeis University also shared that the change in policy to move e-reserves to the campus CMS and to expect instructors to process and manage their own course reserves, which occurred in late 2006, “was made to encourage a self-service model for faculty and because of limited staffing” (A. Scanzani).

Though it still offers both full physical and electronic reserves services, the Head of Access Services at the University of California at Riverside explained that, as a result of budget

constraints, the library is undergoing a “pilot reorganization for some of our services” (V. Novoa, personal communication, March 12, 2010). A possible merging of the Desktop Delivery and Electronic Reserves units was proposed in the earlier reorganization report, though this recommendation was not ultimately implemented.

Elimination of electronic reserves services at the University of California at Santa Cruz (UCSC) library, however, is currently underway, largely as a result of budget and financial limitations, as the campus shifted to use of a Sakai-based learning management system (LMS) in the fall of 2010 and the library moved away from Docutek. “We've had sort of a perfect storm here due to budget cuts, staff turnover, and the decision made by the campus to discontinue WebCT. Because the new LMS will give instructors much greater flexibility and access to their materials, and we no longer have the staff to support our scanning service, we will be transitioning away from E-Res over the next year (N. Lawson, personal communication, March 30, 2010).” Staff also sought permission from the campus to implement a per item/per hour fee for scanning and offering new rush services (with a 1-2 day turnaround time) that began with the new LMS in Fall 2010, though that was ultimately not approved (S. Troy, personal communication, March 12, 2010). “Unfortunately I cannot offer more specifics, as much of our decision depends on the yet to be determined budget cut we expect for FY10/11 (N. Lawson).” According to an update in December 2010, “We are still transitioning away from E-Reserves and into a campus Sakai-based LMS. However, we received a more positive budget forecast than originally expected and decided not to implement a charge for the scanning service” (N. Lawson).

Discontinuing e-reserves from the library can bring about savings in a variety of ways, including those related to staffing costs, both in reserves and circulation departments.

Equipment and software costs can be reduced when purchase and maintenance of an e-reserves system and associated scanners are eliminated from the library. Cost savings would further arise if the library no longer pays for copyright compliance. Libraries may also be able to recapture and repurpose space currently used for reserves (staff workspace, as well as related service desk and shelf space).

## **2. Availability and expanded use of course management systems**

Course management systems can facilitate selected e-reserves tasks, give instructors more freedom, and provide students with better access to course materials. Many institutions use or are beginning to adopt a CMS or to use it more fully than when initially implemented. The availability of such tools has facilitated the transfer of some e-reserves tasks from academic libraries to others who might include instructors, teaching or administrative assistants, or other entities on campus. These tools offer greater self-service for instructors who want to manage and control their own course readings, as well as consolidated, seamless access to the materials for students enrolled in classes using CMS. As another benefit to more fully utilizing the CMS, in most cases, purchase, subscription, and maintenance costs for the system are the responsibility of an academic unit outside the library, even if library staff time is invested in posting materials there or instructing faculty on how to use the system. Furthermore, because the institution has invested heavily in the CMS, campus administration often want faculty to take advantage all the features the software provides.

Finally, it's easier for students to access materials from a single location such as the CMS than to have some course materials available in the CMS and others in a separate library e-reserves system. In explaining why the University of Arizona Libraries transitioned its e-reserves service to the campus course management system, its Access & Information Services



Team Leader explained the benefit for students of having all student resources accessible via the CMS (R. Huff-Eibl, personal communication, May 21, 2010). It also saves the student from needing to learn the language and use of the library's e-reserves system, which may also then decrease questions at a library's circulation, reserves, and/or information desks related to these materials. Nonetheless, this benefit can be realized even with the library still maintaining and processing e-reserves and posting them to a CMS course page.

### **Risks and Challenges to Moving e-Reserves out of the Library**

Despite the advantages of implementing and using a course management system for e-reserves, some challenges should also be considered and addressed.

#### **1. Copyright compliance**

Copyright is a primary concern for institutions as they consider the idea of making faculty responsible for fair use determination and copyright compliance, often fueled by recent legal suits like the Georgia State case. The library's experience and oversight of copyright compliance is intended to protect the institution, and instructors may lack the expertise needed to do this effectively, even with guidance offered through the library's web site. Furthermore, busy instructors may delegate any processing of e-reserves that might be the responsibility of the instructor to teaching assistants or administrative assistants, who may be even less familiar with copyright issues and guidelines. Concern is also raised that more lawsuits may arise over time, since several institutions have made this transition only recently. Other campuses responding to the inquiry, however, noted much lesser concerns about copyright violations. For example, when asked whether it has experienced any difficulties with copyright violations since compliance moved from the library to faculty, the Brandeis university library's Reserves

Coordinator stated that she was “not aware that any copyright violations have occurred (A. Scanzani).” Similarly, though faculty at the University of California at Davis may scan their own materials and place them in their SmartSite courses, the Head of the Reserve Service Department at UCD’s Shields Library states that she is not aware of any copyright infringement (F. Bryan).

Institutions are dealing with copyright compliance in a few ways, with some moving this role to instructors and others retaining it within the library. One respondent, formerly in Access Services at the Yale University Library, cautioned against such faculty self-service, calling it “incredibly dangerous and irresponsible, and explaining that because the library supports course work and excels at organizing and protecting information, the library should be responsible for e-reserves on campus. He further stated that “leaving this to faculty and their support staff is dangerous and could be expensive for a variety of reasons (D. McCaslin, personal communication, March 17 and December 15, 2010).

At the University of Washington Libraries, instructors are responsible for copyright compliance. The library’s *Instructor’s Guide to Reserves, Ereserves and Course Packs*<sup>iii</sup> explains the advantages and disadvantages of using each of these services, how to manage one’s own e-reserves, and how to create links to material already licensed by the library. It also recommends that instructors who choose to use their course website for readings or manage their own e-reserves alert the library, so that library staff can create links to the library catalog and from MyUW (a personal gateway to UW Web resources one uses most) to make it easier for students to find the site. At the University of Kansas too, instructors are ultimately responsible for determining fair use of their materials, though the library provides education to instructors on fair use analysis and determination, and will decline to scan materials it feels violate copyright law.

The University of Louisville Libraries also requires instructors to comply with copyright prior to placing e-reserves requests. Ekstrom Library requires all faculty placing items on course reserve to review the Fair Use Law and Fair Use Explanation published by the United States Copyright Office. Copyright educational and instructional materials have been supplied to the University community since 2009, when campus lawyers and administrators created a webpage of overarching copyright resources,<sup>iv</sup> which also links to a library-specific section, including course reserves, developed by library staff. The library also created a checklist and four-factor determination form to help instructors determine whether a selection is likely permissible under copyright law. Instructors are asked to print and retain a copy of the completed form for each reserves submission, saying that “all faculty will be required to verify that they are submitting their reserves in good faith by initialing their assent on the course reserve web form.” The library also reserves the right to refuse any course reserve request if it conflicts with library staff’s interpretation of copyright law. Its reserves submission form requires instructors to initial to accept the following conditions. “I attest that all submitted materials (a) do not currently appear in any course-pak, (b) comply with Ekstrom Library's current course and electronic reserve policies, and (c) comply with current U.S. copyright law. I understand that all possible reserves will be made available on the Black Board platform. No reserve will be completed unless this form is signed by the designated faculty member above” (Louisville).

Brandeis University library also offers copyright guidance for instructors, which includes information on Brandeis’ reserve copyright policy, copyright considerations for reserve materials, and guidelines on determining fair use. The website also links to other resources such as a Fair Use Checklist prepared by the Indiana University Copyright Management Center, and other checklists, guides to copyright compliance, copyright basics and FAQs, and the Fair Use

Doctrine as outlined in section 107 of U.S. copyright law. Further examples include the University of Texas System, whose Policy Statement on Use of Copyrighted Materials outlines that instructors are responsible for complying with copyright and that library units may not copy materials for reserve. Nonetheless, copies of copyrighted materials are accepted for reserve from the instructor if they comply with U.T. System policy and copyright law. The document further advises that instructors can comply with copyright law by limiting access to reserve materials to students in their courses, giving a ratio of one copy to thirty students as a guideline (Texas).

Though instructors at the University of Kansas are responsible for determining fair use for their course materials, the library provides education on fair use analysis and determination, and offers copyright basics for the classroom for instructors and students. For instructors delivering course reserves via Blackboard with selections of content requiring copyright clearance and royalty payments, the University of Kansas library refers faculty to the campus bookstore (Kansas). At the University of Missouri–Columbia, library staff assisting instructors with copyright compliance is an important part of what they do, especially for ERes (J. DeWeese, personal communication, December 7, 2010).

When library administration at San Diego State University were asking what services they might cut or how they might accommodate budget limitations, and decided to discontinue its e-reserves service, their primary concern was the obstacle of copyright. For the initial year following the decision, serving as a transition year, the library provided \$8,000 to Montezuma Publishing, the on-campus course pack publisher, to help defray the copyright fees of faculty who had formerly used the library's e-reserves and were now encouraged to use Montezuma's course packs (either in paper or digital format). However, how copyright royalties would be paid in future years had yet to be determined (S. Baird). As a non-library operation, Montezuma

Publishing was charged with subsequently making PDFs for course reserves. The library, in collaboration with Blackboard and Montezuma Publishing staff, assisted in the transition by updating its copyright guide and offering instruction on copyright.

## **2. Resistance to embrace the CMS**

Using the CMS in lieu of a separate e-reserves system can not only relieve the library of these tasks, but can also offer self-service to instructors, some of whom welcome that independence. However, most institutions making this change would likely encounter at least some instructors who prefer full service from the library. For example, though reports that the elimination of both e-reserves systems and Blackboard at UC-Berkeley in favor of bSpace has been positive, any such transition is likely to require more effort to migrate some instructors than others (C. Rubens, personal communication, March 15 and April 14, 2010). The Access Services Librarian at Butler University also anticipates some holdouts, should that library ever decide to move toward greater use of the CMS for e-reserves. “We have a lot of faculty who have defected to Blackboard on their own. So we have considered discontinuing e-reserves. However, we still have a very vocal few that rely on it heavily so we are holding for now and plan to revisit the idea in a year or two” (B. Matthies, personal communication, April 23, 2010). Noting a 2-5% annual increase in electronic reserves in its library (reflecting an averaged growth rate since beginning its electronic reserve program in 2003), a librarian at the University of Illinois at Chicago explained that “while many of our instructors use Blackboard, they find it labor intensive and enjoy the service we provide, especially since we provide a fair use analysis of the materials” (P. Hunter, personal communication, August 9, 2010). She also stated that many instructors simply add the link to their e-reserve page to their Blackboard course site.

## **Changes to Physical Reserves Operations**

Though not the focus of this article, some respondents shared insights about their physical reserves operations. Only one institution in this scan was found to have eliminated print/physical reserves completely, while others continue to offer this core service, with volume of use varying across campuses. Citing declining use, budget cuts, and changing priorities, the University of Arizona announced on its website that it would discontinue its physical reserves service and transition its electronic reserves service to its learning management system, D2L (Arizona). The University of Arizona Libraries noted a significant decline over the six years preceding its elimination of print reserves in use of this service, and chose to “redirect resources and cover other high use services” (Arizona, January 11, 2011). Additionally, at least one other library which spoke to the authors indicated that a similar measure of possibly eliminating print course reserves was under discussion on its campus.

Staff at the University of California-Davis Library shared that its reserve unit has taken on handling of DVD media and this is a rapidly growing area (J. Newborn, personal communication, March 12, 2010). The Oregon Health & Sciences University (OSHU) Library still supports physical reserves, but notes that fewer course reserve binders are being placed on reserves, while reserve books remain in demand (J. Norton). Its Reserve, Media, & Microforms librarian has seen a decrease in use of physical reserves at the University of Illinois at Chicago Library, though use of media in reserves has increased (P. Hunter). Having noticed the change in Fall 2009, the Head of Access Services at Pepperdine University also agreed that its library is having far fewer books being placed on reserves, while more DVDs are taking their place, a trend which has continued in Fall 2010 (S. Bryant). Public Services Librarian at the Saint Joseph College Library has also noticed a decreasing trend in both physical and electronic materials being placed on reserve (S. Ward, personal communication, July 23, 2010).

Another possibility is employed at the University of California at Merced (UCM), the newest campus within the University of California system which celebrated its official grand opening and welcomed its first class of undergraduates in the fall of 2005. UCM has never offered physical reserves, but instead maintains a program called Supplemental Course Resources (SCR) (Merced) to digitize materials from a wide variety of formats. “SCR makes additional course materials of your choice available to your students through UCMCROPS or other course management systems. The Library ensures that fair use and copyright are followed, digitizes the materials, and posts them to UCMCROPS. All items posted by the Library will be removed at the end of each semester.” Deputy University Librarian Donald Barclay shared that UCM faculty “have been supportive of this service.” Additionally, for books that cannot be made available electronically, he explains that “the most we have had to do is make a handful of books non-circulating at faculty request. We leave these books in the open stacks and do not control their use. Our shelving statistics show that they are rarely reshelfed, and we typically restore these books to circulating status at the end of each semester” (D. Barclay, personal communication, March 12, 2010).

A former librarian at Yale, now head of Access Services at Caltech (California Institute of Technology), offers further thoughts on physical reserves, noting concerns that libraries are frequently burdened with textbooks that are quickly superseded by subsequent editions. He also feels that “libraries use too small of a ratio to determine the number of copies of a particular book” to put on reserve, and that “libraries should partner with their university bookstores in a way similar to Netflix or at least allow libraries to re-coup” some of their costs (D. McCaslin).

An interesting change coming in 2011 is the University of Alberta Libraries' decision to no longer place required commercial textbooks on reserve as of January 2, 2011, referring inquiries to the Copyright Office for details (Alberta).

Open for further exploration with regard to physical reserves is whether libraries are restricting physical reserves in any way or using statistics to better understand use of their physical reserves. For example, do libraries track use of physical reserve items in order to calculate a cost per use (volume of use versus staff processing time, copyright costs, etc.) or communicate with faculty about the number of times their physical reserve items were used in the term?

Perhaps as a result of recent budget constraints, several university libraries are considering or implementing limits on the numbers of materials permitted on course reserves per course. Kathryn Leigh, the Head of Access Services at the University of Massachusetts Amherst expressed interest in ways to reduce that library's number of print reserve materials. "We are sharing usage stats with our faculty so that they can see that many of the materials they place on print reserves are used very little" (K. Leigh, personal communication, March 15, 2010).

According to its web site, another institution, Washington State University Libraries also sets a limit of 20 total items (print or electronic) which can be on reserve for a particular course, though library staff is willing to discuss or reconsider its limits upon faculty request (Washington). As a related example, Rice University limits its e-reserves to no more than 60 electronic reserve articles per course each semester, though makes no mention of a limit to its physical reserves (Rice).

## **CONCLUSION**



The results of this environmental scan, and subsequent conversations with library staff around the country, indicate that course reserves landscape is one that is in the state of significant change. For more than 100 years, libraries have provided reserves as way to meet the information needs of faculty and students. In the 1999 Kristof study, a majority of ARL libraries offered or would soon put forward an electronic reserve system to complement physical reserves. After a decade of building and providing a full-service model, in which the library is responsible for all aspects of the reserve process, many of these libraries are now rethinking or reworking that model.

Budget constraints and declining financial support for library operations, concerns about copyright compliance, along with staffing and workload issues, have forced libraries to re-evaluate many internal processes. Perhaps the most significant driver of change, however, has been the rapid adoption by academic institutions across the country of course management systems. CMSs allow for and support a self-service model for creating supplementary course materials.

The majority of respondents to this scan are somewhere in between full service and self-service, in what could be called a hybrid model where the library may do a majority of the tasks (Library Focus) or a minimal number of tasks (Non-Library Focus), sharing a portion of the work with other units. These new service models have a very different look and feel from the traditional status quo of reserves and give rise to the question of long-term survival of e-reserves services as we now know them.

What is the future of e-reserves? Whether one of the proposed models, or another model, will emerge - only time will tell. It will be interesting to look again at this core but changing service again in ten years time.

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<sup>ii</sup> The following were excluded from the scan: Bibliothèque de l' Université Laval, Bibliothèques de l'Université de Montréal, Boston Public Library, Canadian Institute for Scientific & Technical Information (CISTI), Center for Research Libraries, Library and Archives Canada, Library of Congress, National Agricultural Library, National Library of Medicine, New York Public Library, New York State Library, Smithsonian Institution Libraries.

<sup>iii</sup> <http://www.lib.washington.edu/types/course/reservefaq.html>, accessed December 9, 2010.

<sup>iv</sup> <http://louisville.edu/copyright>, accessed December 6, 2010.