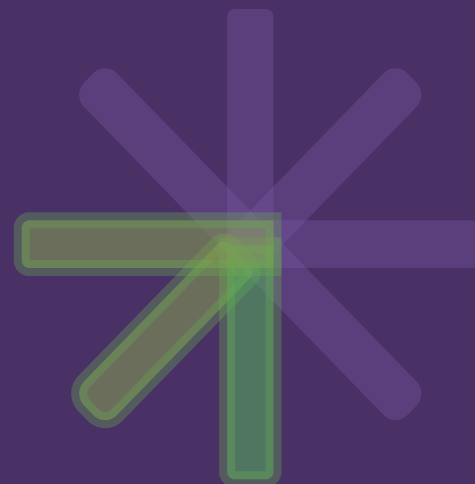

Digital Library Management and E-Resource Strategy Training Course

26 – 30 April 2027
Cape town





Digital Library Management and E-Resource Strategy Training Course

Ref: 40_11850 **Date:** 26 – 30 April 2027 **Location:** Cape town **Fees:** 4800 GBP

Programme Summary

Digital library management and e-resource strategy is a one-week training course for library directors and heads of information services at strategic level, culminating in a digital library roadmap for their institution. Licensed content absorbs a growing share of acquisitions budgets, yet renewals are often decided on habit and born-digital collections lack a preservation plan. The approach links the e-resource lifecycle, platforms, metadata, preservation and usage evidence into one service. Mars Training Centre UK delivers this programme in digital library management and e-resource strategy.

The Business Case

Subscriptions, platform contracts and digitisation projects are long commitments that are hard to reverse once signed. Libraries that govern them with usage evidence, clear licence terms and an agreed preservation policy can defend their budgets, protect user access and redirect funds towards services that research, policy and business teams value.

- Cost per Use and Budget Allocation: Improve when renewals and cancellations follow standardised usage evidence rather than precedent.
- Access Continuity and Licence Risk: Strengthen when perpetual access, archiving and authentication terms are negotiated before signature.
- User Discovery and Service Uptake: Rise when metadata quality and discovery configuration let users find licensed and local content in one search.

Principles and Evidence Base

- TERMS Techniques for Electronic Resource Management: Structures the e-resource lifecycle from investigation and acquisition to annual review and cancellation in Sessions 1 and 2.
- COUNTER Code of Practice Release 5: Provides standardised usage reports for cost-per-use and renewal analysis in Session 4.
- OAIS Reference Model ISO 14721: Frames ingest, archival storage and access responsibilities for digital preservation in Session 3.
- Dublin Core Metadata: Guides descriptive metadata for digitised and repository collections and their discovery in Session 3.



Intended Participants

- Leaders accountable for the library or information centre budget and its subscription portfolio.
- Senior managers who negotiate licences and platform contracts with publishers and vendors.
- Heads of collections, digital services or systems responsible for library platforms and discovery.
- Managers who oversee digitisation and institutional repositories.

The programme serves universities and research institutes, government and parliamentary libraries, corporate knowledge centres and health sciences libraries.

Learning Outcomes

1. Participants will be able to evaluate the e-resource portfolio against institutional priorities using the TERMS lifecycle.
2. Participants will be able to construct a licence negotiation position covering access, archiving and usage rights.
3. Participants will be able to diagnose gaps in the library services platform, metadata and discovery environment.
4. Participants will be able to design a digitisation and digital preservation plan aligned with the OAIS reference model.
5. Participants will be able to prioritise renewals and cancellations using COUNTER 5 usage and cost-per-use analysis.
6. Participants will be able to justify a phased digital library roadmap to senior decision-makers.

Programme Structure

Day 1: Digital Library Strategy and the E-Resource Lifecycle

Where does the digital library create value for the institution, and where does it leak budget?

- Hybrid Collection Strategy: Print, Licensed and Local Digital Content
- TERMS Lifecycle From Investigation to Annual Review
- Stakeholder Mapping for Research, Teaching and Policy Users
- Collection Development Policy for Electronic Resources
- Digital Library Maturity Self-Assessment

Day 2: Licensing, Acquisition and Vendor Relations

How are licences negotiated so that access, rights and cost stay under control?

- Licence Clause Analysis: Perpetual Access, Archiving and Walk-In Use
- Big Deal, Open Access Agreements and Title-by-Title Models
- Consortium Purchasing and Shared Negotiation
- Authentication and Remote Access Arrangements
- Vendor Performance Review and Exit Planning



Day 3: Platforms, Metadata, Digitisation and Preservation

How are systems and collections built so content can be found today and kept for decades?

- Library Services Platforms: Alma and FOLIO Selection Criteria
- Dublin Core Metadata and Discovery Layer Configuration
- Digitisation Project Selection, Workflow and Quality Control
- Institutional Repository Governance
- OAIS Reference Model and Preservation Policy

Day 4: Usage Analytics, Budget and Value Reporting

What evidence justifies each renewal, cancellation and new investment?

- COUNTER 5 Reports and Usage Data Harvesting
- Cost-Per-Use and Overlap Analysis
- Renewal and Cancellation Decision Matrix
- Multi-Year Budget Scenarios for Price Increases
- Library Value Dashboard for Senior Leadership

Day 5: Applying Digital Library Management to Service Transformation

How are the analyses combined into a funded, staged plan for change?

- Applying the Maturity Self-Assessment to a Participant Institution
- Building the Licence Negotiation Position for a Major Renewal
- Sequencing Platform, Metadata and Preservation Priorities
- Staff Skills and Change Plan for Digital Services
- Digital Library Roadmap Presentation and Peer Challenge

Methodology

The programme uses case analysis and data workshops built on anonymised subscription portfolios, licence texts and usage reports from several library sectors. Participants test decisions against evidence and defend their conclusions in peer review before applying each tool to their own institution.

- Suggested activity: Marking up a publisher licence for access, archiving and usage risks.
- Suggested activity: Ranking a subscription portfolio by cost per use for a budget cut scenario.
- Suggested activity: Mapping a digitised photo archive to OAIS functions.



Capstone Output

Each participant completes a digital library roadmap for their institution, containing a portfolio assessment, a licence negotiation position, platform and metadata priorities, a digitisation and preservation plan, a usage-based renewal matrix and a staged change plan, ready to present to a library committee or executive board.

Frequently Asked Questions

Is digital library management training suitable for directors without a systems background?

Yes. It is designed for library and information leaders at strategic level and assumes experience of managing collections or services, but no systems or programming knowledge.

Which standards underpin digital library management and e-resource strategy here?

The programme draws on the TERMS e-resource lifecycle, the COUNTER Code of Practice Release 5, the OAIS reference model ISO 14721 and Dublin Core metadata.

How is the digital library roadmap used at work?

You present it to your library committee or board as the basis for budget requests, licence negotiations, platform decisions and preservation priorities.