The Story Behind the Numbers: Measuring the Impact of Networked Electronic Services (MINES) and the Assessment of the Ontario Council of University Libraries' Scholars Portal

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Presentation Overview

- Ontario Council of University Libraries (OCUL) and the OCUL Scholars Portal– Toni Olshen

- ARL's MINES for Libraries^{TM} – Brinley Franklin

- OCUL Scholars Portal Usage as Surveyed by ARL's MINES for Libraries^{TM} – Martha Kyrillidou

OCUL's Scholars Portal

OCUL
Ontario Council of
University Libraries

- OCUL is a consortium of twenty university libraries in the Canadian province of Ontario, serving more than 350,000 FTEs, including more than 300,000 undergraduate students, 35,000 graduate students and 12,500 faculty members.

- OCUL's member libraries cooperate to enhance information services through resource sharing, collective purchasing, document delivery, and other related activities.

OCUL Member Libraries

- *Brock University*
- *Carleton University*
- *Guelph, University of*
- *Lakehead University*
- *Laurentian University*
- *McMaster University*
- *Nipissing University*
- *Ontario College of Art & Design*
- *Ontario Institute of Technology, University of*
- *Ottawa, University of*
- *Queen's University*
- *Royal Military College of Canada*
- *Ryerson University*
- *Toronto, University of*
- *Trent University*
- *Waterloo, University of*
- *Western Ontario, University of*
- *Wilfrid Laurier University*
- *Windsor, University of*
- *York University*
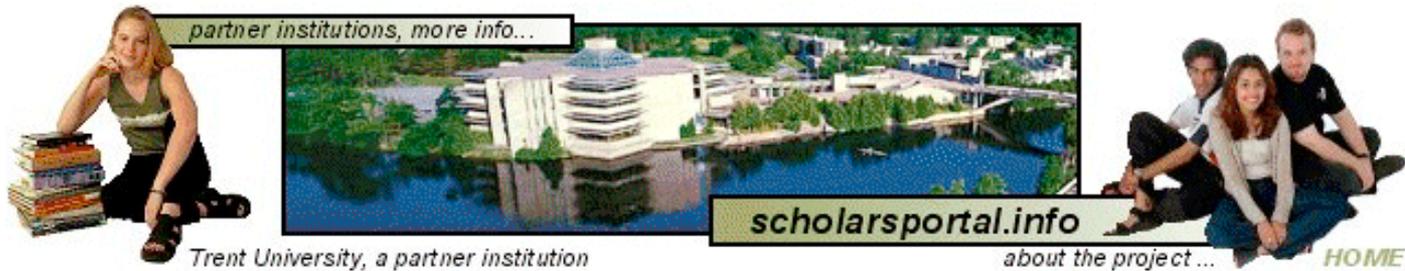
OCUL's Scholars Portal

- Initiated in 2001, with $7.6 million in funding from the Ontario Innovation Trust (OIT), the OCUL Scholars Portal offers a unique set of shared information resources and services.

- As of July 2005, the Scholars Portal contains 8.2 million articles from 7,219 full-text journals published by 16 academic publishers.

- Coverage of most disciplines, with a concentration in the sciences, but growing social sciences and humanities offerings.

- The OCUL Scholars Portal is one of the largest collections of electronic journals available to researchers anywhere.
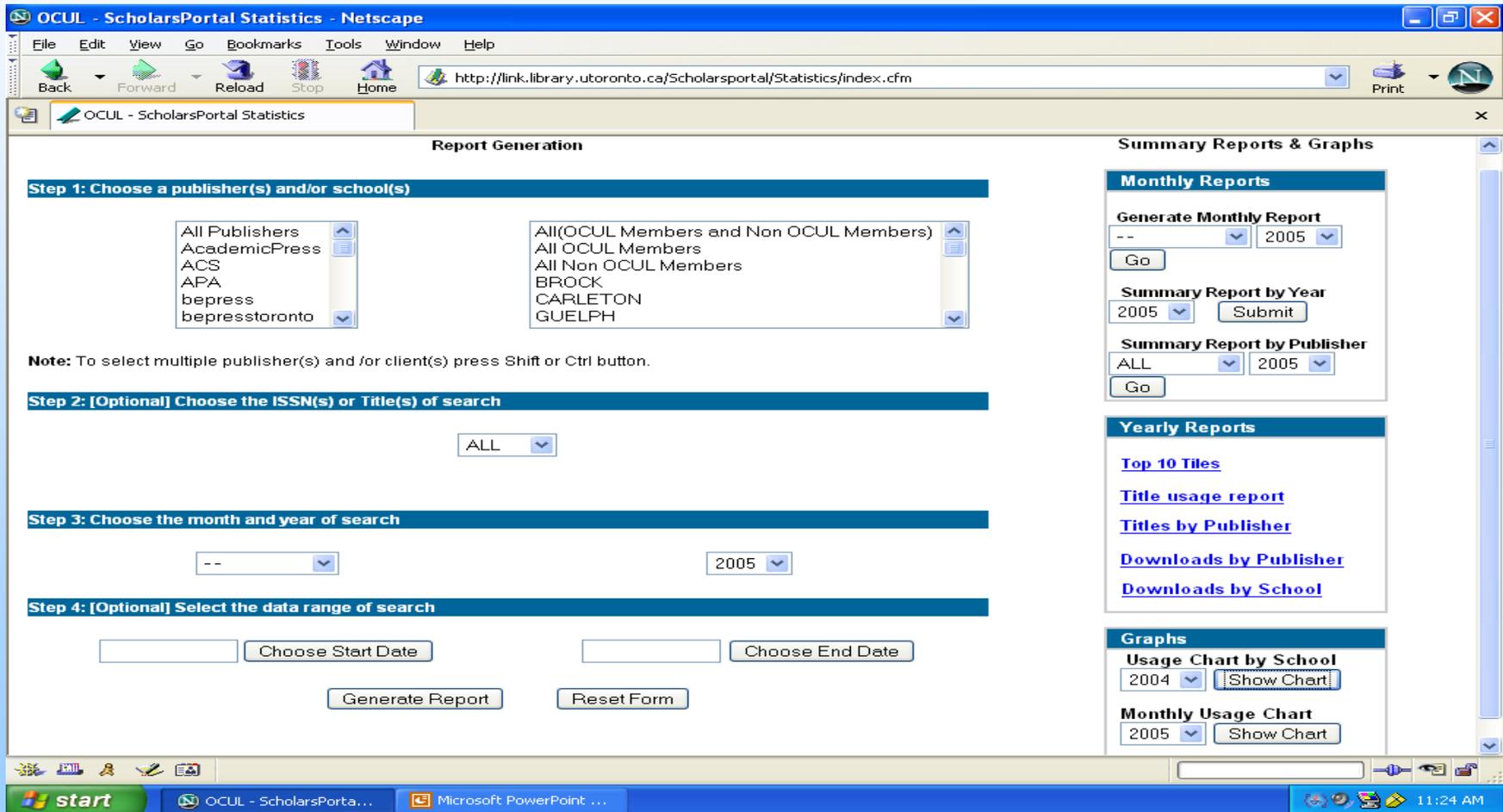
Scholars Portal Resources

- Academic Press
- American Psychological Association
- American Chemical Society
- Berkeley Electronic Press
- Blackwell Publishing
- Cambridge University Press
- Emerald Publishing
- Elsevier Science (Elsevier Science, Harcourt Health Sciences)
- IEEE Publication
- Kluwer (Kluwer Academic Publishers, Kluwer Law International and Kluwer/Plenum)
- Oxford University Press
- Project MUSE
- Sage Publications
- Springer-Verlag
- Taylor and Francis
- John Wiley & Sons

Scholars Portal – Project Goals

- Centrally mount and deliver information resources acquired through OCUL consortia purchases to ensure rapid and reliable access

- Provide for the long term, secure archiving of resources to ensure continued availability

Scholars Portal Statistics and Report Generator

Evaluating the OCUL Scholars Portal's Success

- A successful search was redefined as connecting the user to an article of interest for viewing, downloading or printing

- This definition is unique to Scholars Portal because of consortial server setup and archiving of content

- Employ a mix of quantitative and qualitative tools for a richer assessment: journal/publisher usage data, MINES survey, student and faculty focus groups, staff survey

ARL New Measures

- E-Metrics
- LibQual+™
- DigiQual™
- DD/ILL Study
- SAILS
- Learning Outcomes
- **MINES for Libraries™**

What is MINES?

- MINES is a transaction-based research methodology consisting of a web-based survey form and a random moments sampling plan.

- MINES typically measures who is using electronic resources, where users are located at the time of use, and their purpose of use.

- MINES was adopted by the Association of Research Libraries (ARL) as part of the "New Measures" toolkit in May, 2003.

- MINES is different from other electronic resource usage measures that quantify total usage (e.g., Project COUNTER, E-Metrics) or measure how well a library makes electronic resources accessible (LibQual+™).

Questions Addressed By MINES for Libraries™ for the OCUL Scholars Portal

- How extensively do sponsored researchers use OCUL's Scholars Portal? How much usage is for non-funded research, instruction/education, student research papers, and course work?

- Are researchers more likely to use the Scholars Portal from inside or outside the library? What about other classifications of users?

- Are there differences in Scholars Portal usage based on the user's location (e.g., in the library; on-campus, but not in the library; or off-campus)?

- Could MINES, combined with usage counts, provide an infrastructure to make Scholars Portal usage studies routine, robust, and easily integrated into OCUL's administrative decision-making process for assessing networked electronic resources?

OCUL/MINES Methodological Considerations

- The sampling plan was determined at the outset. Surveys were conducted once a month for two hours a month between May, 2004 and April, 2005

- The selection of the monthly survey periods were weighted based on usage counts by time of day and were chosen randomly.

- Participation was mandatory, negating non-respondent bias, was based on actual use in real-time, and was brief (to minimize user inconvenience).

- OCUL designed the local questions, mounted the survey, collected data and sent it to ARL for tabulation in aggregate and by individual institution.

- If more than one search was conducted by a user, the survey form was auto-populated with initial responses as the default.
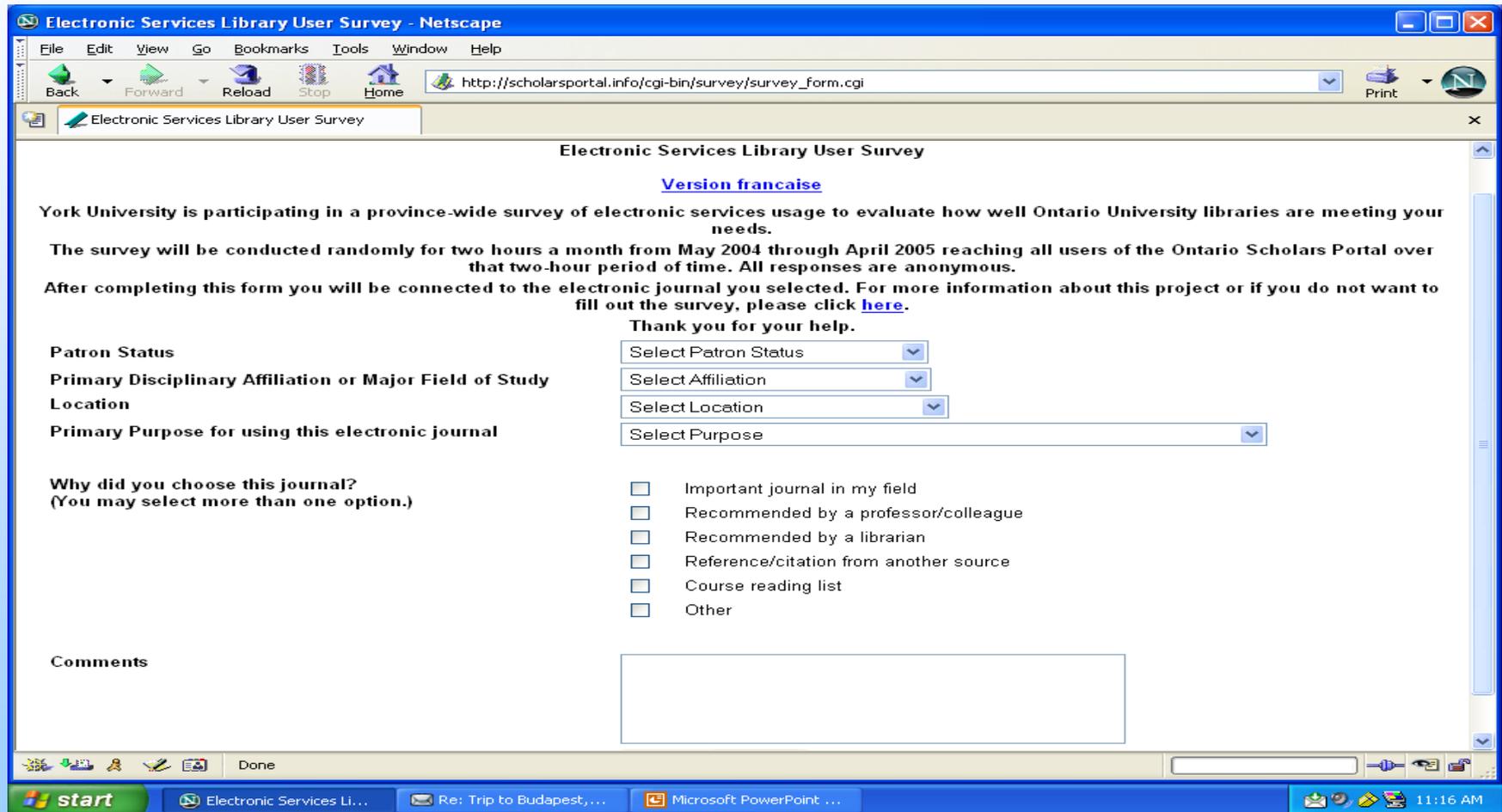
OCUL/MINES Methodological Considerations (Continued)

- Each participating library explained the survey and its confidentiality provisions to their local constituency.

- Research ethics officers and/or Ethics Review Boards, where necessary, reviewed and approved the survey instrument and methodology.

- OCUL determined that individual institutions and their institution-specific data collected during the survey periods would not be disclosed. Individual data was anonymous.

- The mandatory nature of the survey required discussion on some campuses and caused one OCUL member library to withdraw from the study.

- Two institutions pre-tested the survey in January, 2004. Data collection programming and configurations/links had to be revised in February and March, 2004.

- After completing the survey, users were connected to their desired Scholars Portal networked electronic resource.

MINES for Libraries™ Survey Form
Five Questions and a Comment Box

MINES - Mozilla Firefox

File   Edit   View   Go   Bookmarks   Tools   Help

http://www.statsqual.org/mines/manage/results/index.cfm

LibQUAL   Demonstration Surv...   Google Scholar   DigiQUAL   Google Image Search   Wachovia Securities...   Send a Message   Virtual2005 Login   ARL Statistics & Mea...

MINES

MINES for Libraries™

a project from StatsQUAL™

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MINES for Libraries™ Results - Survey Highlights 2004-2005

Presented below is an overall summary of the institutions that participated in the MINES for Libraries™ project in 2004-2005. For additional analysis by institution, view the "ALL OCUL Institutions" and "Analysis by Institution" sections under the Results tab.

Frequency by Institution

Institution	Frequency	Percent
Brock University	1032	4.6%
Carleton University	960	4.2%
Lakehead University	223	1.0%
Laurentian University	284	1.3%
McMaster University	1690	7.5%
Nipissing University	66	0.3%
Queen's University	1084	4.8%
Ryerson University	630	2.8%
Trent University	1025	4.5%
University of Guelph	2626	11.6%
University of Ottawa	2090	9.2%
University of Toronto	6467	28.6%
University of Western Ontario	1761	7.8%
University of Windsor	660	2.9%
Wilfrid Laurier University	354	1.6%
York University	1643	7.3%
Total	22595	100%

Frequency by Institution
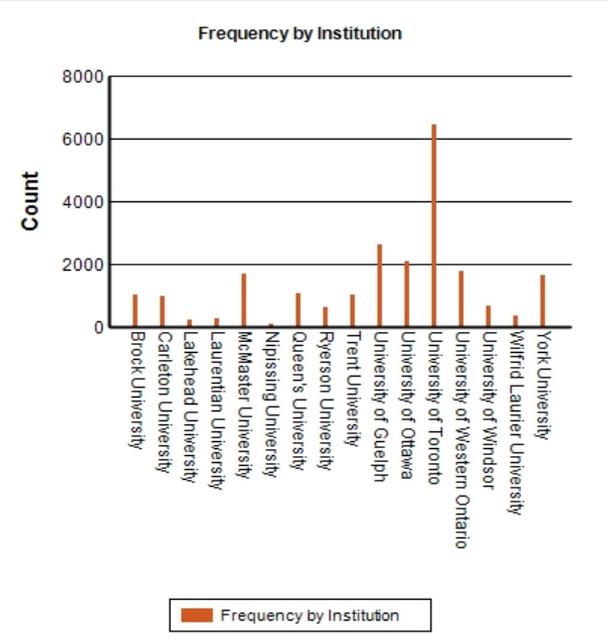
Frequency by Date

Date	Frequency	Percent
May 2004	1411	6.2%
Jun 2004	812	3.6%
Jul 2004	1688	7.5%
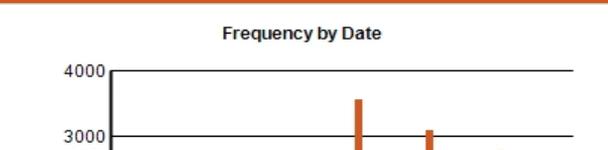
Frequency by Date

OCUL Scholars Portal Usage Affiliation

Frequency by Affiliation
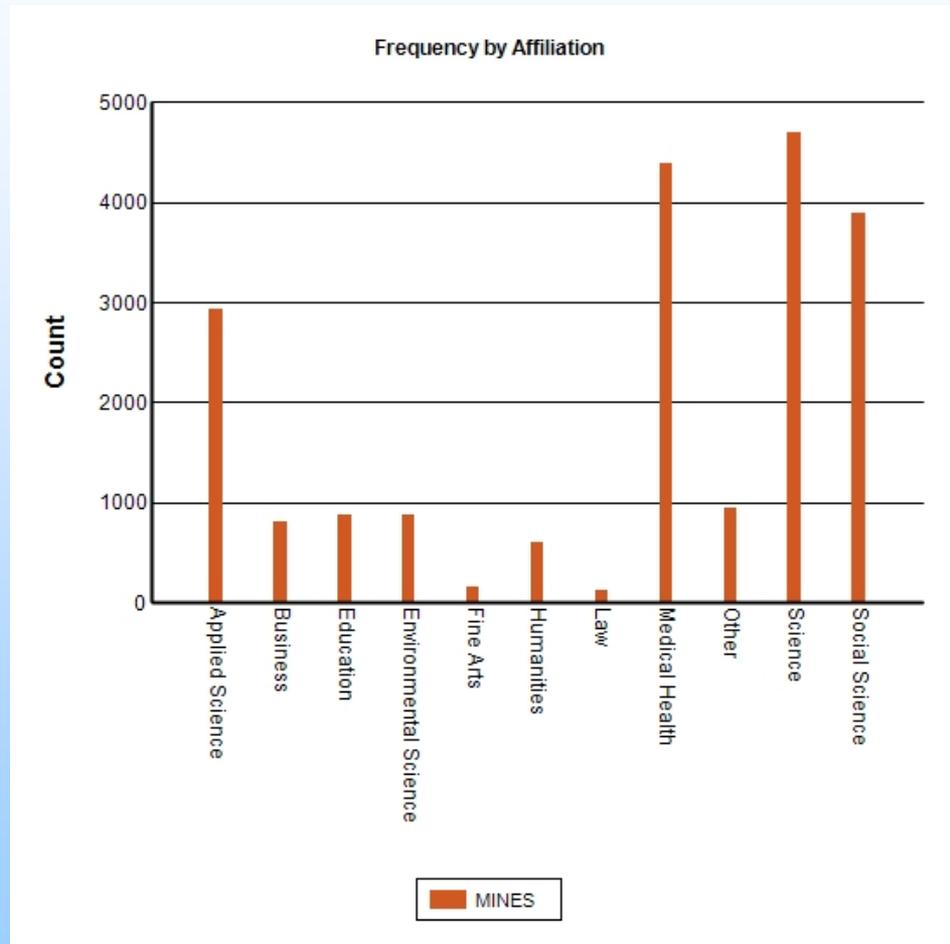
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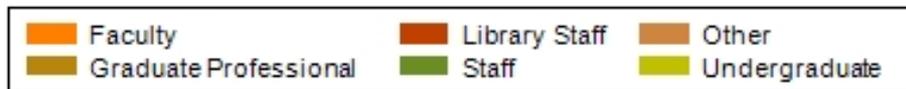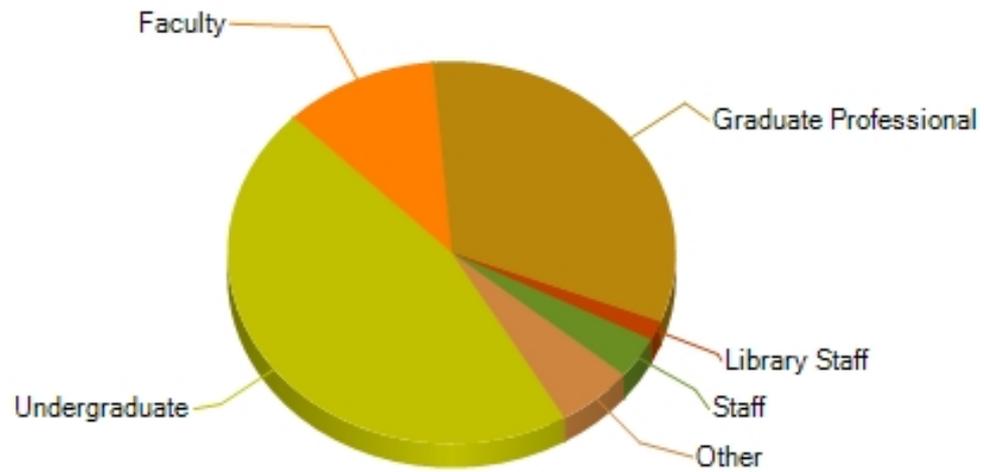
Frequency by Location

Frequency by Purpose of Use

Affiliation by Purpose of Use

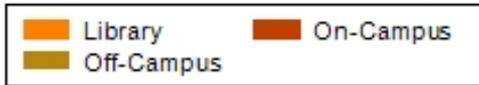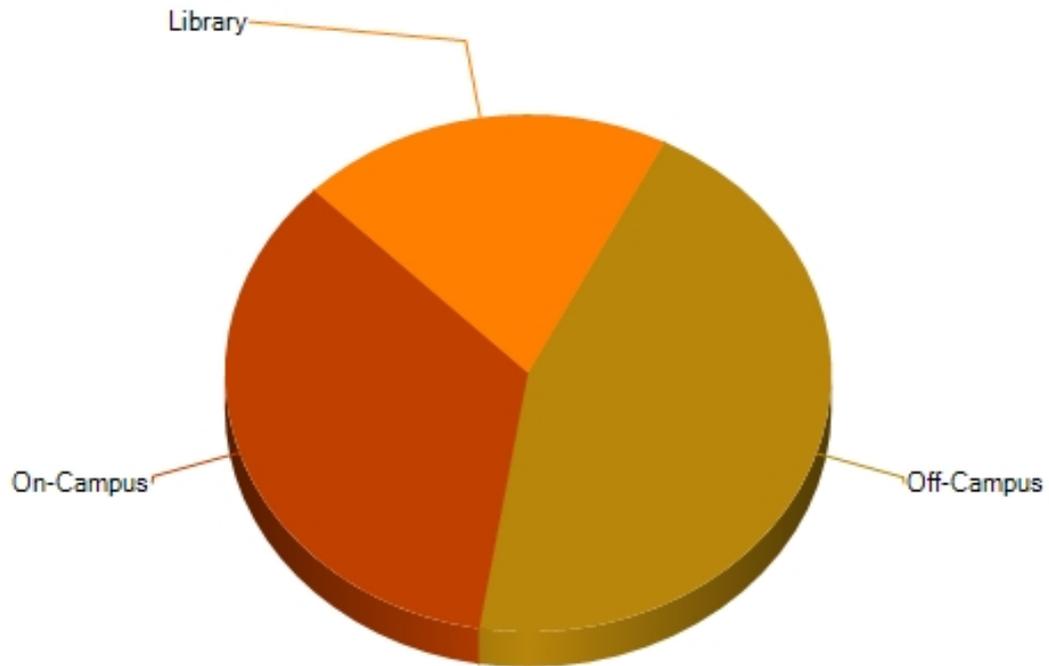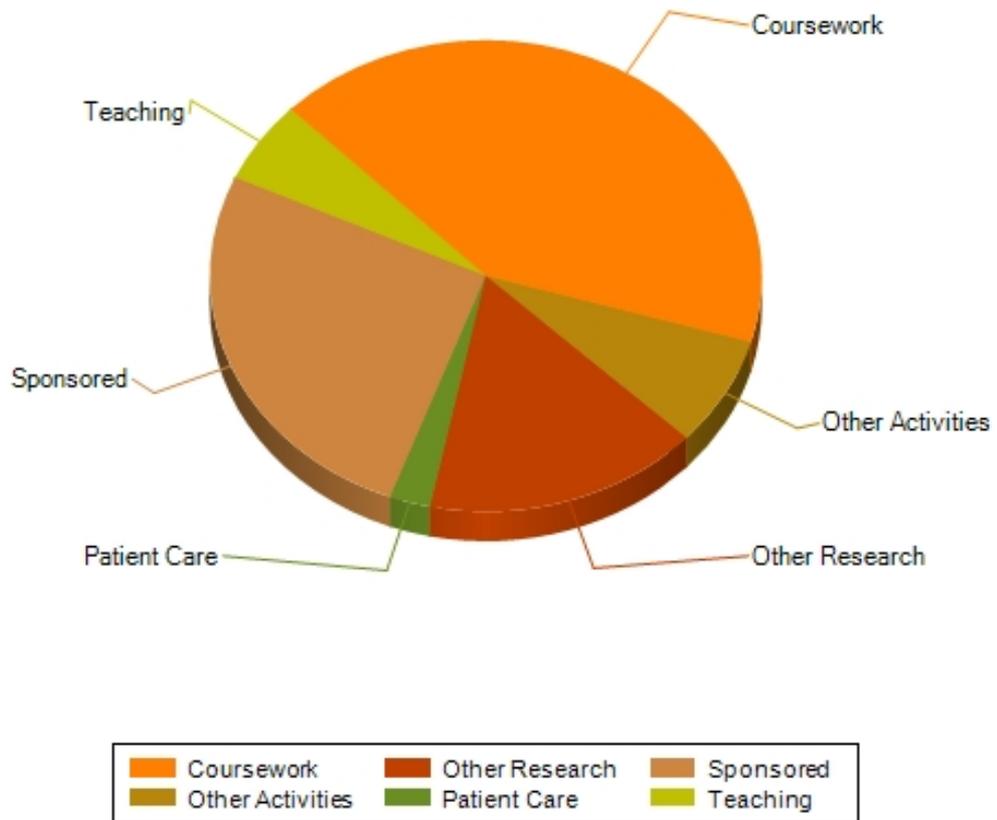| Affiliation	Purpose of Use						
	Coursework	Other Activities	Other Research	Patient Care	Sponsored	Teaching	Total
Applied Sciences	24.0%	7.6%	17.7%	0.6%	46.3%	3.7%	100.0%
Business	34.8%	7.6%	30.0%	0.9%	10.8%	16.0%	100.0%
Education	40.9%	5.4%	17.1%	0.8%	11.8%	24.0%	100.0%
Environmental Studies	43.5%	2.5%	24.0%	0.3%	23.3%	6.3%	100.0%
Fine Arts	56.3%	6.9%	20.6%	1.3%	5.6%	9.4%	100.0%
Humanities	51.5%	10.8%	21.0%	0.5%	9.5%	6.7%	100.0%
Law	67.5%	6.8%	12.8%	0.9%	2.6%	9.4%	100.0%
Medical Health	29.7%	5.5%	18.4%	8.6%	32.0%	5.7%	100.0%
Other	51.9%	22.8%	10.9%	2.1%	7.4%	5.0%	100.0%
Sciences	44.6%	9.7%	11.1%	0.4%	31.8%	2.4%	100.0%
Social Sciences	62.6%	4.5%	14.4%	0.7%	13.6%	4.2%	100.0%
Total	**42.0%**	**7.5%**	**16.2%**	**2.4%**	**26.2%**	**5.6%**	**100.0%**

User Status by Purpose of Use

User Status	Purpose of Use						Total
	Coursework	Other Activities	Other Research	Patient Care	Sponsored	Teaching	Total
Faculty	1.5%	4.7%	21.2%	4.4%	42.6%	25.6%	100.0%
Graduate Professional	19.5%	3.9%	25.5%	2.5%	45.4%	3.2%	100.0%
Library Staff	23.5%	24.1%	13.1%	16.5%	17.7%	5.2%	100.0%
Other	6.0%	35.2%	20.8%	8.7%	26.8%	2.5%	100.0%
Staff	3.5%	9.5%	20.6%	2.1%	51.6%	12.7%	100.0%
Undergraduate	75.8%	7.8%	7.7%	0.9%	5.9%	1.9%	100.0%
Total	**42.0%**	**7.5%**	**16.2%**	**2.4%**	**26.2%**	**5.6%**	**100.0%**

Location by Purpose of Use

Location	Purpose of Use						Total
	Coursework	Other Activities	Other Research	Patient Care	Sponsored	Teaching	
Library	52.8%	14.9%	10.8%	1.2%	12.3%	7.9%	100.0%
Off-campus	47.2%	7.0%	17.3%	4.1%	19.9%	4.6%	100.0%
On-campus	29.2%	4.0%	17.9%	0.9%	42.2%	5.7%	100.0%
Total	**42.0%**	**7.5%**	**16.2%**	**2.4%**	**26.2%**	**5.6%**	**100.0%**

Issues for Further Discussion

- How do we allocate expenditures for electronic resources?

- How do we allocate indirect costs for electronic resources?

- What is the appropriate balance between electronic and print?

- What is the appropriate balance between centralized and distributed purchasing?