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Nuanced and Timely: Capturing Collections Feedback at Point of Use

Rick Stoddart
Oregon State University

Jane Nichols
Oregon State University

Terry Reese
Ohio State University - Main Campus

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Thank you for coming; in right place; I’ll be talking about a project the 3 of us have been working on to test a point of use survey tool. Rick is joining us via video and Terry was not able to come. So what I hope to do is present for about 20 minutes and then leave the rest of the time for questions and discussions. We’ll kick it off with Rick’s short introductory remarks.
This is a prototype both in the use of the code, the survey construction, and methodology of deployment.

As such we are going to gather some feedback from you – you are kind of a “focus group” for us.
Inspired by...

Three times... this last time Terry crafted some code that inserted the survey within the proxy process. It occurred to the library that we could use this code in a similar manner to gather feedback from specific library resources.
Activity: Think - Pair - Share

If you were able to have a pop-up survey before selected electronic resources…

• What would ask?
• What specific collections would you target and why?
• What would you be able to do with the results? (How would you use this evidence?)
So my role in this is to articulate some of the big pictures connections.

We often talk about USE as a measure for collections but that often boils down transaction numbers such as circulation statistics and downloads that provides information about WHAT they are using but limited information about HOW or even WHY our collections are being used. This project attempts to fill in some of these blanks. This point of use survey incorporates a qualitative question asking **How will access to this library resource help you to do?** and we have seen answers such as Complete a Class Assignment, Complete a dissertation or Provide Readings for my Students. Responses such as this help connect the collection to the curriculum, to research, and to student needs. And tell a bigger story beyond simply usages through article downloads.

It is these Broader Impacts with students, faculty and other stakeholders that libraries are being pressured to better articulate. We may intuitively know the answer to some of these questions such as... (read questions) -- but a survey tool or research project like this can help provide evidence to support our understanding and allow us to make evidence-based decisions about how best to tell the story of the library’s with stakeholders. For example, as we gather more evidence, it might be possible for the library to better advocate to university administrators about our role in supporting grant funded faculty research on campus.

Beyond asking what access to the collection allows you to do -- the survey also asks the
respondents to put a monetary value on accessing the article as well as how long they would be willing to wait for access (immediately, within 24 hours, 1 day, etc.). This places a dollar and time value on the collections from a patron perspective that we didn’t often have. This provides not only information for collection development but also give sense of how students and faculty value access to our collections. Is the perceived value of immediate access to our collections the same for both librarians and patrons? This is something the survey hopes to find out.
1. collection development, purchasing, and ROI
We wanted to test the software, survey questions and survey design across several iterations so we could apply what we learned from earlier iterations to later ones. The spring after Terry created the code, we conducted our first round with our Elsevier UTL unique title list; because it is a well-defined journal list of that gets a lot of use by our patrons. This fall after revisions to the code, the survey and the survey design we tested the pop-up survey software again but focused on JSTOR journal titles acquired due to a gift from our Ecampus. Finally, this January we tested it on both the Elsevier titles; this time expanded to include all titles we have access to as well as the JSTOR Ecampus titles.

Now that you have a broad picture of how we deployed the survey; let’s look at it from a survey respondent’s perspective.
The next few slides show what the user encounters. For each iteration of the survey, the survey was programmed to display when users navigated to our e-journal list or...
a database or discovery tool. After the user selected a citation from a targeted journal, then the...
IRB form displayed and if they agreed to take the survey they were presented with the questions.
At this time the survey has a simple look and feel and design. Currently it works well with multiple choice questions like these as well as with open comment questions. After completing the survey...
the user is directed to their intended article. For anyone who chose no, they didn’t want to respond to the survey, they were directed to their intended article.
Now that you have a feel for what the user sees. Let’s take a look ‘under the hood’. Key to the success of triggering the survey to pop-up at the journal level, is our proxy server. In OSU’s case, we use EZProxy. For this survey infrastructure Terry also deployed a public proxy server on Apache. We’re all familiar with using a proxy server from off-campus where you log in prior to getting to your article; that’s what is meant in our case by a public proxy. In this workflow; an Apache proxy is added which plays the key job of a decision engine, driven by SQL rules and IP address. Based on the rules, the public proxy analyzes the users request for an article; determines if the person should be displayed a survey; displays the survey when appropriate and when not, sends them to their article. For the most part this works well and we are able to capture meaningful data. In the lessons learned and next steps, I share some tweaks that need to be made.

For further technical details I recommend Terry’s article published in Ariadne. The citation is listed on this slide.
We wanted to share some of the responses we've gotten so far to give you a sense of the types of data that can be collected. I report on just a slice of all of the data collected. The next few slides are from the most recent round which surveyed all of our Elsevier titles and those acquired from JSTOR with the Ecampus gift.

The survey included 6 questions about use and 3 demographic questions. It ran 24 hours a day/7 days per week for 3 weeks. We captured 1364 total responses.

16% of the respondents were Faculty/Instructor/Researcher
27% of the respondents were Graduate students
53 % of the respondents were Undergraduates
One aspect of use we wanted to learn about was how core or not, patrons felt the targeted article was to their course assignment, research or teaching. Of the respondents who feel the resource is core, students led in this category. Additional analysis can be done to learn if the rate of students saying they feel the source is core is higher or lower than faculty or graduate students. I also think it makes sense that undergraduates opted to say they hadn’t used the resource before so they didn’t designate it as core or supplemental.
Here are comments to an open-ended question which asked what will access to this library resource help you to do. I picked examples representing the range of comments undergrad, grads and faculty gave.
Graduate Students

I am working on a literature review for my Master's project. This allows me to work from my home as opposed to the library (which is generally crowded with undergrads).

Fix a mixed up citation.

Needed for my dissertation research and my teaching.

Understand the use and applicability of a specific research tool.

Complete an assignment, broaden my learning, open new avenues of investigation.

Create a higher quality research product.

Get reliable information about topics I know little of.
It’s fascinating to see how important the resources are to the individual’s need and to the university’s core mission: education and research. We suspect that being able to capture these types of comments would be very helpful for a variety of library purposes such as collection development decisions and demonstrating the value an academic library has to its parent institution.

<table>
<thead>
<tr>
<th>Faculty</th>
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<tbody>
<tr>
<td>Create a syllabus for core course for a recently-approved PhD program in WGSS.</td>
</tr>
<tr>
<td>Get funded proposals so the library can take its cut out of the overhead and then be able to get more books and better online access and grow.</td>
</tr>
<tr>
<td>Keep up with current research in my area and quickly access needed articles.</td>
</tr>
<tr>
<td>Access is absolutely essential to my research, especially since I am a faculty member who is not on campus.</td>
</tr>
<tr>
<td>Speed up my writing.</td>
</tr>
<tr>
<td>Tenure and promotion.</td>
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<tr>
<td>Complete publications on research projects in progress.</td>
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While the findings seem very promising, I want to share a few lessons learned from our successive rounds and some next steps.

First, we know we’d like to make changes to our survey design. For example, we’d like to ask fewer questions. A total of 9 questions is still longer than what we prefer. One possible solution is to alternate questions, for example in one round ask a question about core-ness and in another ask about purpose of use.

Another lesson or challenge is to prevent patrons from receiving the survey multiple times. We have several options to try such as only deploying it for a short time frame such as one hour per day for one week. Or, we could limit the number of responses to a given journal, where once we get 5 responses, the survey is turned off.

We could explore if capturing existing data from proxy server would suffice for our assessment needs.

For our next steps we know will employ some of the options above to resolve duplicate responses, we will revise survey questions based on existing responses and Terry Reese is looking at how he might use Qualtrics API. Qualtrics has a pop-up distribution option that looks very nice where you can paste code into your web site, includes animation and takes advantage of Qualtrics full survey backend. However where this differs is what triggers the
survey to pop-up; with Qualtrics you would have to figure out how to launch the survey at the journal level.
I mentioned Terry’s article earlier, now I’d like to share where the initial code release is. He is open to partners to develop it and for sharing data. If you are interested we have contact information in the last slide. Now that you have a good sense of the tool, how it works and what data it can capture, Rick will lead us in a discussion.
We’re going to turn this around a bit – since you are our mini-focus group – normally in presentations they let you ask us questions (and we’ll get to that) but first we want to ask you some questions to crowd source improvements to our prototype.
If you could only ask one question on the survey what might it be?
What are some ideas to improve the design/methodology of this survey/project?
What are some strategies to balance the annoyance factor of surveying electronic resources?

Access vs. Annoyance
How many survey responses would you need about a single journal title to make an informed decision?
5, 10, 25, 100...

Or your supervisor would need?
Informs the methodology about how often survey would appear,
What evidence about collections does your...

...supervisor value?
...library administers value?
...collection development value?
...campus decision-makers value?
...faculty value?
...stakeholders value?

Informs type of questions to include on the survey
Contact us for questions.