The Unknown Path—Evaluating Electronic Resources for Access-Based Collection Development

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Overview

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Overview

Old way

New way

- Team approach
- Holistic collection-sculpting
- Areas of emphasis
- Evaluation *before* decision

Overview

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- Evaluation
- Negotiation
- Transparency
- Documentation

Rubric Overview

- **Ten Criteria Including:**
 - Feedback
 - Trials
 - Accessibility
 - Content & Scope
 - Library Specific Concerns
 - License/Contract*
 - Usability*

*Lines for licensing and contractual issues and for usability are based on separate, comprehensive checklists.

Rubric Overview

	A	B	C	D
1	RESOURCE:		Name:	Date:
3		Excellent	Medium	Poor
4	Trials results	<i>Positive and plentiful feedback from faculty and students; liaison positively reviewed; high use of trial</i>	<i>Mediocre but plentiful feedback from faculty and students; liaison reviewed as at least not-bad; medium use of trial</i>	<i>Negative and/or little feedback from faculty and students; liaison negatively reviewed; low use of trial</i>
5	MARC record availability	<i>Available, no cost.</i>	<i>Available, but at a cost.</i>	<i>Not available.</i>
6	Accessibility	<i>VPAT is filed and available</i>	<i>VPAT available upon request</i>	<i>VPAT not available</i>
7	Subject area liaisons' review	<i>Positive and plentiful feedback from liaisons; multiple requests to purchase received</i>	<i>Mediocre feedback from liaisons OR few or no requests to purchase received.</i>	<i>Negative feedback from liaisons and no requests to purchase.</i>
8	Curricular support	<i>Supports curriculum in multiple departments; highly interdisciplinary.</i>	<i>Supports curriculum in at least one department; slightly interdisciplinary.</i>	<i>Supports curriculum for only one highly specific course or none at all.</i>
	Subject coverage context of holdings and other available	<i>Overlap analysis shows that subject coverage is not duplicated</i>	<i>Overlap analysis shows that subject coverage is partly</i>	<i>Overlap analysis shows large amount of duplication and few</i>

Feedback

Subject Librarian Reviews

Excellent:

- Multiple requests
- Positive feedback

Poor:

- No requests
- Negative feedback

Feedback

Trials

Excellent:

- High usage
- Positive feedback & plenty of it
- Subject librarian involvement

Poor:

- Low or no usage
- Negative or no feedback
- Lack of interest from subject librarian

Trials

Feedback and Requests:

- Email
- Qualtrics Survey
- Guidelines

Promote:

- Library Website Homepage
- LibGuide
- Email
- Newsletter
- Monthly liaison meetings

Trials

CURRENT TRIALS

AmericanaVictorianRoutledge Handbooks eHrafGale LegalFormsBernan DigitalDigiZeitschriftenDictionary of American Regional English

American History, 1493-1945
From the Glazier-Lehrman Institute of
American History, New York

American Indian Histories

American West

Everyday Life and Women in
America, c.1800-1920

Popular Culture 1950-1975

Slavery, Abolition and Social
Justice

Virginia Company Archives

AM Explorer: Americana

Access the trial at www.americana.amdigital.co.uk until July 7, 2015.

Please provide feedback with this [brief survey](#) or by emailing erin.miller@unt.edu.

Ranging from Early Contact and the Colonial Period through Revolution and Reform, and the Civil War to Civil Rights, the Explorer platform supports multiple periods and research topics across the Humanities, sourced from a core range of primary source content.

Cross-searchable access to millions of pages of essential American history, literature and culture. Uncover captivating manuscript and typescript letters, diaries, notebooks, journals, newspapers, plus incredible art works, illustrations, photographs, video and 360-degree objects.

Trials and Promotions LibGuide
http://guides.library.unt.edu/ERtrials_promotions

Trials

Guidelines for Librarians, Faculty & Students:

- Trials can be requested at any time during the year
- Limit of 4 concurrent trials
- Faculty & Students request through Subject Librarian
- Requests will be denied only if:
 - Product recently discontinued
 - Product recently trialed
- Trials are accepted for:
 - New products
 - Enhanced products
 - Products supporting new programs

Accessibility

VPAT -- Voluntary Product Accessibility Template

- Rehabilitation Act of 1973
- Supports & enhances the Americans with Disabilities Act (1990)
- Section 508
 - Access to electronic & information technology
- Federal government regulation:
 - Government agencies
 - Federally funded nonprofits
 - Public education (K-12 and post-secondary)

VPAT Repository:

<http://uniaccessig.org/lua/vpat-repository/>

Content & Scope

Collection Context

Excellent

- Overlap analysis completed
- Fills gap in collection
- Not duplicated

Poor:

- No collection need
- Large amount of duplication

Content & Scope

Curriculum Support

Excellent:

- Interdisciplinary
- Supports new or developing program/s

Poor:

- Supports one highly specific course...
- ...or none at all

Library specific concerns

Access Based Models

Excellent:

- EBA available
 - Usable
 - Affordable
 - Manageable

Poor:

- ▶ No EBA available
- ▶ Or – available but:
 - Unusable
 - Unaffordable
 - Unmanageable

Licensing Concerns

State Requirements

- Availability of usage statistics
- Indemnification
- Governing law
- Venue
- Term
- Limitation of claims
- Confidentiality

Library Concerns

- Authorized users
- Interlibrary Loan
- Course-packs/reserves
- Ability/permission to mine data
- Type or quality of perpetual access

Governing Law

- **Excellent:** Listed in license as Texas
- **Medium:** No mention of governing law
- **Poor:** Listed in license as a state besides Texas

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Term (time limit)

- **Excellent:** Exact time period is specified and covers only current fiscal year
- **Medium:** Exact time period is specified and covers more than current fiscal year—we must add a clause allowing us to break contract in case of budget cuts
- **Poor:** Exact time period covered is not specified

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Confidentiality

- **Excellent:** No clause contained in license
- **Medium:** Clause limited to language of Texas Public Information Act
- **Poor:** License contains a clause

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Availability of Usage Statistics

- **Excellent:** Usage data available and COUNTER compliant
- **Medium:** Usage data available but not COUNTER compliant
- **Poor:** Usage data not made available by vendor

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Ability/Permission to Mine Data

- **Excellent:** Permitted explicitly
- **Medium:** Neutral language
- **Poor:** Prohibited

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Contracts & Licensing Checklist

- Outsources time-consuming review process
- Allows for two sets of eyes on the process
- Pauses process for negotiation

☐ Interlibrary loan

- ☐ Rights permitted and method of electronic provision is not restricted
- ☐ Rights permitted but method of electronic provision is restricted
- ☐ Prohibited by license (flag)
- ☐ Other: _____

☐ Course packs

- ☐ Electronic permitted, no record-keeping requirements, and no deletion at end of semester
- ☐ Electronic not permitted; record keeping requirements; deletion at end of semester (flag)
- ☐ Not permitted (flag)
- ☐ Other: _____

☐ Perpetual access, if applicable

- ☐ Contains perpetual rights language and fees are specific
- ☐ Add perpetual rights language and specify fees (flag)
- ☐ Other: _____

What do we *do* with the contracts info?

- Evaluate
- Negotiate
- Dictate
- Decide
- Communicate

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Usability

	A	B	C	D
		Excellent	Medium	Poor
Usability

Recommended Usability Metrics:

- Task success measures
- Efficiency
 - i.e. task completion time
- Comparing metrics
 - Overall usability
 - Measure multiple metrics

(Tullis & Albert, 2013)

Usability rubric -- content

Abstracts

- Available for all content?

Full Text Availability

- Available for all content?

Media

- Multiple media formats included?

Usability rubric -- content

References

Excellent:

- Displays alongside full-text
- Exports to various citation managers
 - RefWorks
- Multiple formats available within the platform

Poor:

- Not available to format within the platform
- Do not export directly to Refworks

Usability rubric -- content

Online Help Pages/ Tutorials

Excellent:

- Available
- Easy to find
- Include both text, video and LibGuides
- Applicable

Poor:

- Difficult to find or unavailable
- Outdated or irrelevant

Usability rubric -- functionality

Discovery

- Across both index and full-text

Output Options

- Easy to download, print, email, share via social media, etc.

User Accounts

- Easy to accomplish
- **Not required**

Usability rubric -- functionality

Search Methods

Excellent:

- Multiple methods (simple, advanced, browsing, etc.)
- Easy to narrow retrieval within results
- Easy to save search for future replication

Search Techniques

Excellent:

- Boolean operators, truncation, proximity searching
- Spellcheck
- Good browsing options

Usability rubric -- appearance

Search Screens

Excellent:

- Easy to find
- Easy to use

Search Results

Excellent:

- Display limited to a few results or a longer list
- Format of each result is clearly demarcated

Usability rubric -- appearance

Mobile Content

Excellent:

- Renders well on:
 - Mobile
 - Tablet

Readability

Excellent:

- Text is easy to read and easy to re-size
- Headers and borders are appropriately sized
- Sufficient color contrast on page

Usability

Student Evaluations:

- Define terms in the rubric
 - Abstract
 - Citation
 - Index
 - Subject Headings
- Provide Questions or Search Terms
 - Specify Advanced Search Use
- Install Chrome Mobile Emulator
 - Train on CME

Evaluation Rubrics

There are two ways to do the usability evaluation: use either the online form or the excel spreadsheet. If you use the spreadsheet you will need to email the results to erin.miller@unt.edu.

- ☐ Excellent
- ☐ Medium
- ☐ Poor

Usability Eval Online

First fill in the name of the online resource you are evaluating, your name, your grade level and today's date. Then read through each of the options for each resource characteristic (abstracts, full text availability, etc). Choose the option that best describes the resource you are evaluating. It may take several minutes to look at the resource to find out. You may want to use the help pages in the resource.

Usability Eval Excel File

First type the name of the online resource you are evaluating at the top of the spreadsheet. Then highlight the appropriate choice for each option. At the bottom of each column add up the number of each rating (excellent/medium/poor).

USABILITY

File Structure

A folder for everything...and everything in a folder...

- Evolving from a paper-based heritage
- Preparing for the inevitability of turnover
- Creating & Implementing:
 - Shared Folders
 - No Duplicates
 - Naming conventions

ORGANIZE

Workflow

ORGANIZE

Where do we go from here?

[Marathon, 26 miles](#) by Matthew Rutledge, 2010. Available under a Creative Commons Attribution license.

References:

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Tullis, T., & Albert, B. (2013). *Measuring the user experience: Collecting, analyzing, and presenting usability metrics* (2nd ed.). Waltham, MA: Elsevier, Inc.