EVALUATING FROM ARM’S LENGTH: ASSESSING SERVICES PROVIDED BY LIBRARY CONSORTIA

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Scholars Portal, Ontario Council of University Libraries

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Agenda

Context
• Our consortium: OCUL & Scholars Portal
• Assessing consortia

Assessment Case Studies
• Accessible text repository
• Virtual reference services
• Link resolver

Takeaways and Final Thoughts
Ontario Council of University Libraries

• OCUL is a consortium of Ontario’s 21 university libraries.
What is Scholars Portal?

- Scholars Portal is the service arm of OCUL.

- Scholars Portal was established in 2002 as a way to implement OCUL’s planning and direction.

- We provide a wide variety of services to students, librarians, faculty and staff at OCUL member institutions.
Assessing Library Consortia

• Difficult to establish best practices or compare consortia

• Library as client

• Distance from end user
Diverse services - diverse libraries
Case Study: The Accessible Content ePortal (ACE)
Accessible Content ePortal (ACE)

Pilot (2012-2013)
Service (2013 – )

Total items in ACE over 11,000 titles

Partnership with Internet Archive Canada
- Accommodating real-time accessibility requests

- Developed ACE repository on SP Books Platform
- Developed token authentication system for users
- Partnered with Internet Archive Canada to produce accessible texts
Assessing ACE

• How well are we serving our end users?
• How well are we serving library staff?
• Quality and timeliness?
• Are we a cost-effective way to meet the AODA goals?
• Are we meeting our own goals of reducing/preventing duplication of labour?
Welcome to ACE (Accessible Content E-Portal).
Please enter the token provided to you below in order to view content made accessible for you.

Enter token here

Terms of Service
Materials in this repository are subject to Canadian copyright law and are made available for use to persons with disabilities listed under section 32 of the Canadian Copyright Act.

No materials downloaded from this website can be shared with non-registered users.

I am a user with documented print disability registered with a disability services office.

I understand that if I sell, or redistribute materials, I may be subject to legal action. Materials obtained from this repository are for my own educational purposes only.

I agree that once I no longer require material downloaded for my personal research or studies, I will delete the file.

I fully acknowledge that I have read and understood the terms of this agreement for the use of materials from this site.

Submit

About ACE
Frequently Asked Questions

token here to protect anonymity of ACE users
several formats are available for downloading, and each title is broken down by chapter making tracking downloads more complicated

each book page is accompanied by feedback form

This report was prepared for: York

Portal Usage by York Users
368 downloads (203 PDF and 165 alternate formats)
882 pageviews (IP-based - does not include off-campus usage)
4356 titles available in collection
29 unique tokens used of 592 active tokens

Digitization Requests from York

<table>
<thead>
<tr>
<th>DIGITIZATION REQUEST COMPLETION</th>
<th>Unfulfilled requests</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not fulfilled</td>
<td>12</td>
</tr>
<tr>
<td>Completed late</td>
<td>44</td>
</tr>
<tr>
<td>Completed on time</td>
<td>75</td>
</tr>
</tbody>
</table>

Unfilled requests
0 rejected
5 withdrawn
3 unable to fulfill
4 already available

Most Downloaded Books Across OCUL

Ethical know-how: action, wisdom, and cognition
Nothing about us without us: disability oppression and empowerment
Design for the real world: human ecology and social change
The Canadian state: political economy and political power
Reflections on the causes of human misery and upon certain proposals to eliminate them
Cold War Canada: the making of a national insecurity state, 1945-1957
A history of disability
Social problems and social solutions: a cross-cultural perspective

User Experience - All Users

RESPONSES TO ACE USER SURVEY

I was able to find a format(s) I could use (31 responses)

I downloaded the book I wanted without any difficulty (30 responses)

I found it easy to navigate this repository (41 responses)
Case Study: Virtual Reference Services
Ask a Librarian

- Collaborative virtual reference service that connects students, faculty and researchers from participating libraries with real-time research assistance through chat.
Clavardez avec nos bibliothécaires

- Collaborative virtual reference service that offers real-time research assistance in French (francophone version of Ask)
- Launched as a pilot service in 2014
Ask / Clavardezh Regular Evaluation

Evaluation perspectives:
• Service (consortial) -- EN & FR
• Library (local)
• User

Regularly collect:
• Usage statistics (chat session data)
• User demographics (pre-chat survey)
• Patron satisfaction (exit survey)
Ask / Clavardez Evaluation Projects

- Transcript analysis
- Operator behavior
- Assessment of Clavardez pilot service

Ask / Clavardeza Assessment Planning

Weaknesses:
• Overreliance on transactional statistics and user feedback
• User-centered evaluations have focused narrowly on satisfaction
• Librarian perspective has been neglected

Recommendations:
• Perform evaluations from a variety of perspectives
• Review content and quality of answers
• Gather qualitative information
Case Study: SFX OpenURL Resolver
SFX

OpenURL resolver – consortial instance managed at Scholars Portal

Source: Applied cognitive psychology [0888-4080]

Full Text

Get full text from Scholars Portal
— Available from 1987 volume: 1 issue:1 until (and including) 2016 volume: 30 issue:4

Full text available via CRKN Wiley Online Library
— Available from 1996 volume: 10 issue:1
Note: Click below for details on permitted uses:

Full text available via Wiley Online Library Psychology Backfiles
— Available from 1987 volume: 1 issue:1 until (and including) 1995 volume: 9 issue:7
Note: Click below for details on permitted uses:

Full text available via EBSCOhost Academic Search Premier
— Available from 1987
Most recent 1 year(s) not available
Note: Click below for details on permitted uses:
SFX Evaluation

- Is it still true that consortially maintaining a link resolver and knowledgebase saves staff time at member institutions?

- Is SFX still effective as a product?

- If Scholars Portal moves to a different product, such as a next-generation library system, how can we ensure that the product we select and the support we provide meet member needs?
## SFX Survey Key Findings

<table>
<thead>
<tr>
<th>Pros</th>
<th>Cons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saves time to have SP manage KB!</td>
<td>Too much staff time spent updating multiple KBs</td>
</tr>
<tr>
<td>SFX is easy to use and staff understand it</td>
<td>SFX needs customization to make it work</td>
</tr>
</tbody>
</table>

Is SFX still effective as a product?  
Does this service save staff time?  
Unclear!
SFX Survey Key Findings

The schools who relied the most on consortial management of the link resolver were the least likely to have experience with/ability to compare to another product.

At some schools, it was difficult to find the appropriate person to respond.
SFX Assessment Planning

Check in with staff regularly:

• How well is SFX meeting your institution’s needs?

• What are your priorities for a link resolver and knowledgebase overall?

More involved assessment necessary before choosing new product
Takeaways & Final Thoughts
What have we learned?

So far, Scholars Portal has mostly assessed its services on an ad hoc basis, taking advantage of what is automatically tracked in the tools we use, without always taking stock of what would be useful or valuable to measure or which audiences we should consider.
What have we learned?

Assessment planning allows us to thoughtfully and intentionally:

• consult with working groups & other stakeholders to keep lines of communication open
• ensure all relevant viewpoints considered
• check in to ensure that the appropriate metrics are being tracked
Leveraging our consortial status

Partnering with assessment specialists at member institutions to help with assessment planning and specific projects

= turning a potential weakness into a strength!
Final thoughts
Our thanks to:

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Evaluating Ask a Librarian / Clavardez avec nos bibliothécaires
Klara Maidenburg, Ask Coordinator 2011-2015
Maryse Laflamme, Clavardez Coordinator 2014-2016

SFX Survey
Anne Pottier, chair of OCUL-SP Committee
Gillian Byrne, chair of OCUL-SP Evaluation and Assessment Subcommittee
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Thank you!