ERM Use Case – Discovery to Delivery (linked to Move to e-only)

Developed with the Bournemouth University (23 February 2011)

Generic Description – UC18 – Discovery to Delivery - The library wishes to use their electronic subscriptions information to generate a user-facing list of all current titles. They also wish to use the details of their electronic subscriptions to inform their OpenURL resolver and offer users access to their electronic collections.

Use Case Description – What happens?

Activity – Recent years have seen significant changes in the options for and patterns of resource discovery. Focus has shifted from the local LMS OPAC plus a variety of discreet options for such as databases to the more integrated view offered by aggregated discovery services (as offered by Ebsco, ExLibris and Serials Solutions). Whilst there remains concern that Google Scholar trumps all in the minds of many undergraduates, this new generation of discovery services addresses the core service mission of bringing together the trusted resources mediated by the library.

Whilst one of many university libraries treading this path (in their case implementing the Ebsco Discovery Service), Bournemouth is especially committed to bringing resource discovery closer to the world of learning and teaching. The Blackboard VLE and the personalized student home page ('My BU') represent key starting points for discovery and mediation, an approach enabled by the same service and technical team controlling all the working parts (notably LMS and VLE).

In developing this use case, the university has worked for some years on the basis that the user would choose electronic resources over print whenever feasible – as is the case in core Bournemouth subjects such as Business. Therefore accessibility and ease of resource discovery is the key, with delivery being relatively matter of fact. However, the library is aware that this type of service stimulates increasing demand for resources leading to pressures to incorporate appropriate e-book models and to investigate textbook possibilities. The statistics speak for themselves.

Volumes – Key indicators include:

- Increase in article e-downloads from 618k (2004-5) to 875k (2009-10)
- Decrease in book issues from 322k (2004-5) to 186k (2009/10)
- Increase in e-book section requests from 359k (2006-7) to 1.339m (2009-10)
- Increase in library occupancy from a low of 416 per day (2006-7) to 515 (2009-10)
- As detailed below, the library has experienced a further surge in full text downloads in 2010-11 since implementing the Ebsco Discovery Service.
- Meanwhile document delivery is low volume involving around 2000 items per year, though the new discovery service may stimulate further demand
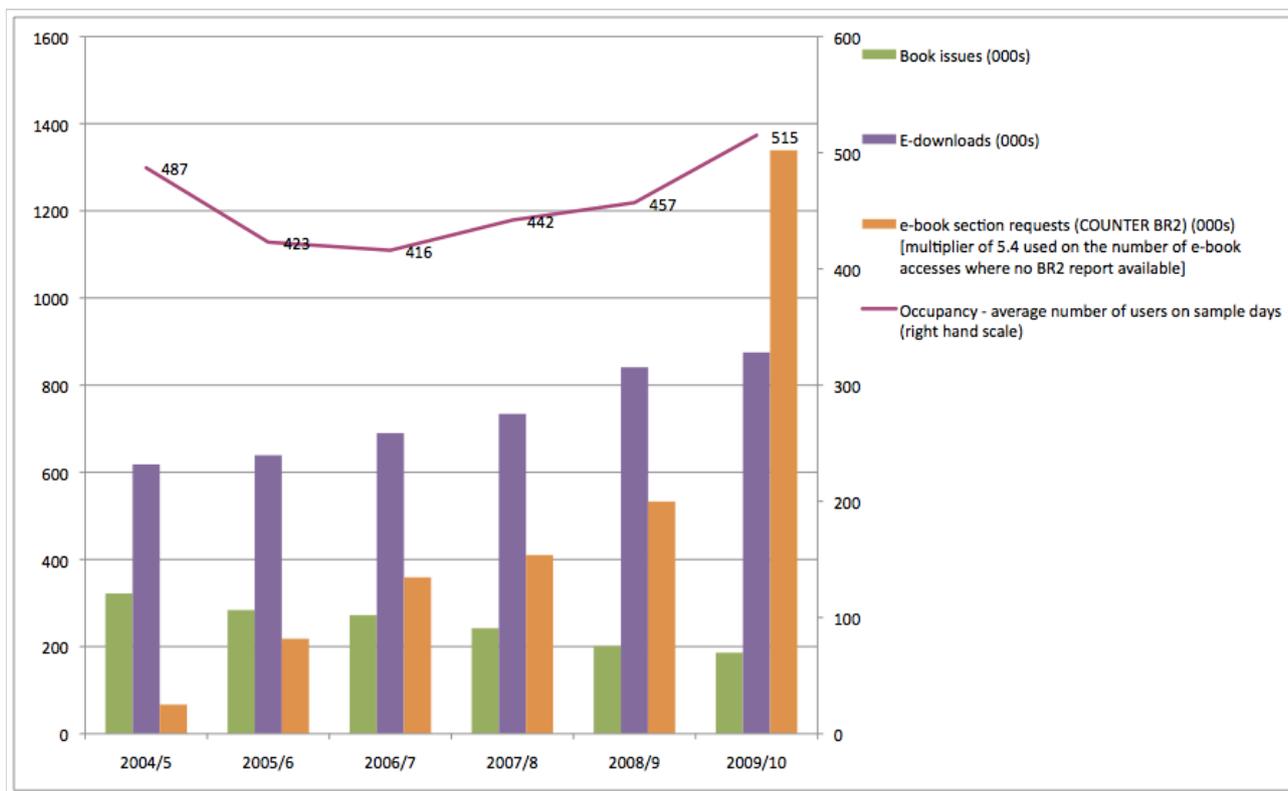
Actors – The Library team managing LMS, VLE and Repository, Subject librarians working with schools, Academics providing reading lists, Ebsco as subscription agent

Data involved – Library catalogue, Journals A-Z list, Reading lists, Repository, Ebsco Host and other databases

Workflows – This approach supports three student discovery workflows relating to taught courses – directed, mediated and serendipitous - directed discovery through reading lists, mediated through online links to subject librarian support and serendipitous through the Ebsco aggregated discovery layer.

The directed and mediated workflows are based on the established position of the student portal (My BU) and the VLE. Students need to access VLE course pages and therefore library resources are consistently signposted there in terms of prominent access to search and to subject librarian support. Reading lists are similarly integrated.

Alternative pathways for discovery directly from the Ebsco search and A-Z list web pages are also supported.

Current Examples – The My BU home page illustrates the prominent position of library services. Other universities have used different but complementary mechanisms to make bring the discovery experience to life – for example, Huddersfield driving interest and discovery through Amazon-style recommendations.

Bournemouth and Huddersfield share a common observation – channels that align with user views of how resource discovery 'should' work in the modern (web) world seem to drive resource usage (i.e. students want to use library resources).

Motivation – What are the pain points?

What are the current problems – Bournemouth is addressing head on the issue of how to expose library-mediated resources (digital and print plus human expertise) to students in a timely and contextualized manner at the point(s) in their activities when they will have most relevance. Of course, users will continue to find value in external search tools such as Google Scholar, but this approach seeks to provide a relevant response at the point of need, in the immediate context of course commitments.

Efficiency assessment – The approach is particularly efficient for courses where the overwhelming majority of materials are electronic and where that mode broadly suits the setting and / or the learning style of the students (for example, in nursing and business).

Economy assessment – The concentration of directed access on the VLE and reading lists enables the library to have a purposeful relationship with schools in terms of prioritization of selection and the value of electronic over print.

Effectiveness assessment – The whole approach is designed to be effective (and efficient) for the user, resulting in direct impact resource usage and therefore on learning. Furthermore, it presents strong opportunities for the library and for faculty to measure and improve effectiveness based on the evidence of access patterns (i.e. using attention / activity data).

Intended Benefits – What is the business case?

Library Service – The aim is to deliver services to learners at the point where need is most clearly focused/

Users – The user is presented with library resources that are clearly contextualized at the point of need, without diminishing the opportunity for serendipitous discovery through the aggregated discovery environment (Ebsco).

Suppliers – The close working relationship between the university and its subscription agent (Ebsco) could lead to mutually beneficial feedback loops, though this is not a primary focus.

Consequences of doing it 'above campus'

What will happen? – This activity is not above campus, though it benefits from the combination of local and wider services into accessible discovery (and ease of delivery in the electronic realm) and from the value added services offered by the subscription agent (e.g. A to Z list).

The key is that it is 'above' the Library Management System and its catalogue (Talis Alto in the case of Bournemouth). The increase in access to database resources has been significant, though further analysis is required to understand whether these patterns are driven by a discovery environment that encourages exploration and even serendipity (the Ebsco Discovery Service was introduced for 2010-11) or by links from the VLE (general) and reading lists (specific). The timing of the increased activity suggests the Discovery Service.
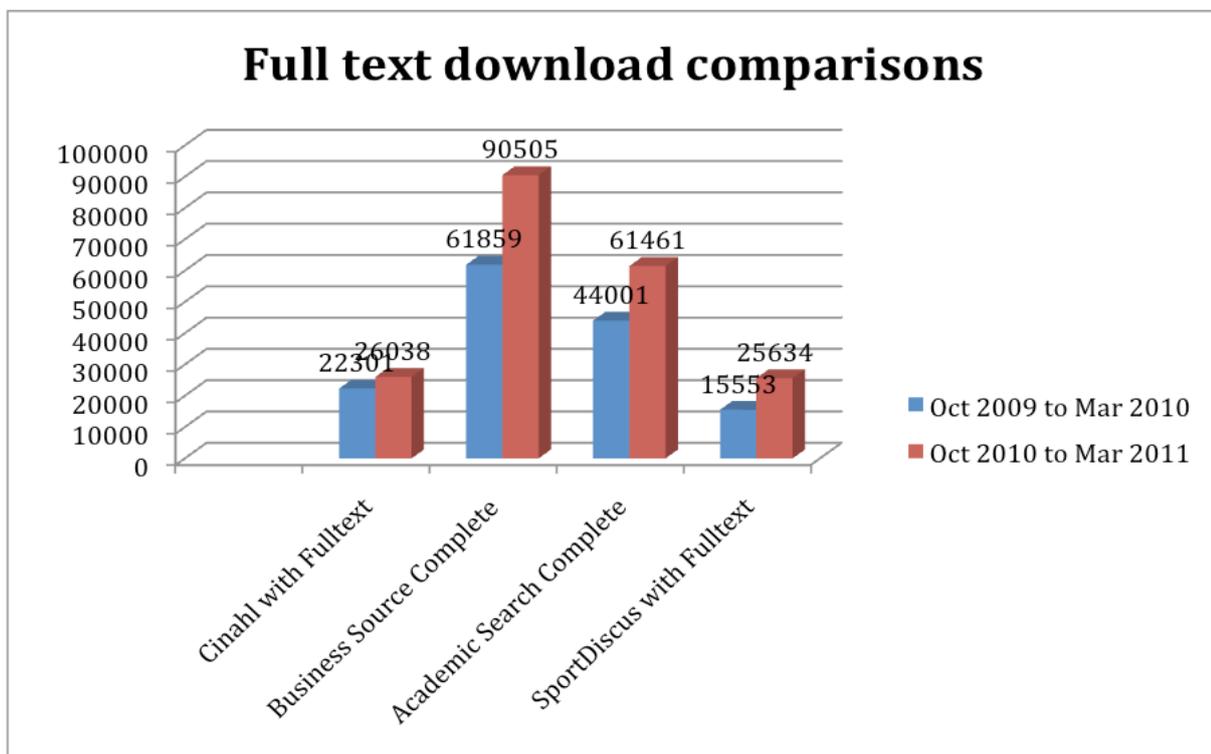
Potential Risks – There are risks in any form of engagement with library resources – e.g. spending time on off model resources, becoming snow blinded by choice – and therefore investigation, as at Huddersfield, in to links between activity and achievement will be of interest.

Consequences of not doing it – The consequences of not providing a 'credible' (i.e. modern, one stop) discovery environment can reasonably be assumed to include migration

of user attention from OPAC to Google / Google Scholar and therefore reduced traction for vital library-related services (such as subject librarian guidance and even reading lists) that highlight trusted and recommended resources. That direction of travel may, for less focused students, lead to diminution of the resources themselves – therefore undermining the core reasoning for driving user benefits from an end-to-end improvement of electronic resource management.

Implementation Pointers – Things to take in to account

Mechanism – (1) Integrating resource discovery in an aggregated service and (2) embedding that service plus subject librarian contact in VLE and in the student portal (My BU).

Inputs & Outputs – Integration of discovery options (input) in to a one-stop service (output)

Standards & Protocols – This is necessarily proprietary.

Existing systems – Talis Alto, Talis List (migrating to Talis Aspire), Blackboard, ePrints, A&I databases, Ebsco A to Z, Ebsco Discovery Service

Staffing – This direction of travel is enabled through the organization of systems responsibilities (notably LMS, VLE and Repository run by the same team) and the nature of the relationship between the library and faculties, driven by a shared commitment to the VLE and to promotion of electronic resources above print wherever possible.

Challenges & Costs

Set Up & Transition – The investment in the VLE and the discovery layer has been crucial in adding focus to the longer term transition from print to electronic. This investment is more about strategic direction and commitment of human resource over time than technology investment.

Ongoing – Given the broad trend of wider choice and increasing utilization, there are vital issues to be addressed, including

- Integration of e-books and especially text books in to these service models
- Incorporation of resources that are only accessible in a federated environment (e.g. specialist legal and marketing publications)
- Working on usage stats to identify databases and journals that are not justifiably utilized
- Development of recommender services based on usage and also on student choices (e.g. patron led e-books acquisition) and reviews (e.g. via the Talis Aspire Facebook page)