

I. E-RESOURCES HEALTH CHECK

A systematic check on the 'state of health' of your provision of e-resources

This section addresses needs such as:

- Identifying connection, service or skill issues limiting the effective use of your e-resources
- Better understanding users' perception of your e-resources
- Determining where actions to improve e-resources provision are best targeted.

It is prudent to proceed on the basis of evidence rather than assumptions. Time spent gathering evidence will be well repaid through enabling better targeting of your efforts and providing a case to argue for action if need be.

Proceed through the following 'health check' or to sections you know are pertinent. If confident you already have a sound grasp of where the issues lie then proceed to the Toolkit sections II – IV outlining potential action to take.

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1. Existing Access

A quick check on the description and perception of your e-resources and their ease and reliability of access.

Descriptions Context

- Take a sample of descriptions of e-resources (from your Web pages and/or promotional material) and ask 5 users and any new/inexperienced staff :
What do you imagine this resource is?
...provides?...is useful for...?

Evaluate: how closely do their interpretations match the intended understandings? Note words that provide mismatched or confused understandings.

- Examine all text in the e-resources descriptions and rate how well it conveys by example the potential use or application of the content, rather than just a listing of content? (see side box).

If there is little in the way of relevant (to your users) example then note areas for review and rewriting.

COMPARE

'EPIC is a national consortium that makes digital resources available to New Zealanders through libraries...it provides many thousands of online journals, newspapers, reference works, images and primary sources'

with:

'...school students researching a project on glaciers could draw on quality reference books to understand the forces that influence their growth, get reports on current worldwide changes in glaciers from popular science journals, then provide a local perspective through articles from NZ newspapers of the last 10 years'

The first description makes only weak connection to user needs; the second conveys potential use.

Ease of Access

- Ask a few users or new staff to find some named e-resources from your in-house website/portal Home page.

Note what they try, how they get there and how long it takes.

Ask them as they proceed why they are doing what they do. At the end ask how clear the prompts and names were? How obvious the path seemed - was there a trail they thought they were following? What points they found confusing or frustrating?

- Try the same test through your external access (If applicable) and ask how clear and easy were the authentication instructions and steps?
- Ask your technical support if there are any logs of the number of 'failures' to log on to the e-resources?
- Carry out a few time trials of the respective time needed to (1) open an e-resource from a named link, (2) open an html article and (3) open a PDF article in a number of different e-resources. Try this at both regular peak use time and off-peak and document results.
[Note: A 'life of request' browser add-on can be a useful tool to accurately measure speeds and file sizes (see *s.II Availability-Resources*).



- If you have records of user complaints/suggestions note the number of issues relating to slow e-resource access over the past 6 months. If no records ask all service staff to recall the number of such events.

Note all weak areas for action. If you have no access to e-resources from your website or Intranet then note this as key requirement. For areas that need immediate attention draft a memo to your tech support and/or library management asking for comment and response.

2. Existing Promotion

A check on the perception of, and awareness generated by, the material interpreting or promoting your e-resources.

Effectiveness of Promotion

'Field test' your promotional material on small focus groups of staff and users. [This could be combined with the tests relating to 'access' above in #1].

Assemble all examples of items that are intended to promote or educate staff or users about e-resources (including print-outs of Web pages) and ask each group:

- Were they aware of the item/page? If so where would they find it?
- Have they ever used it to educate themselves or handed it out?
- Do they feel it is useful in conveying awareness or assisting use of the e-resources?
- Who do they feel it was intended for?
- Do they think the range of material has a consistent message and appearance?
- Does it attract attention and look professional?
- What would they like to see provided to better inform on the availability and use of these resources?

NOTE

If testing a group of users ensure you have a few from different ages or interests. Don't limit to one audience.

Note all participant comments on the material and group stated issues by:

1. awareness 2. availability/location 3. appeal/production standard 4. usefulness/relevance.

If there is no existing e-resources promotional material in any key area (the website, service desks, library newsletters...) then note this as an obvious issue.

3. Existing Skills & Confidence

A (reality) check on the frequency of use of e-resources and the confidence levels of staff and users with them.

Usage

- Determine the frequency of use of e-resources and underlying issues: gather statistics of use for the past 6 months using the EPIC databases admin facilities. [If unsure of how to see *Accessing Usage Statistics*: <http://epic.org.nz/nl/USAGE.html>]



- Identify, rate and list all e-resources by strong, average or weak use. Now ask reference/service staff 3 questions:
 1. Which e-resources have you used over the past month?
 2. Which e-resources do you feel least confident in using?
 3. Which e-resources have you seldom used and why?

List their responses relating to lack of use and categorise them as issues of:

1. skills/confidence
2. access
3. content
4. awareness
5. service approach.

- Finally draw up a list of e-resources by potential relevance to your users, noting them as of high, some or marginal relevance. Compare this relevance ranking with the rated levels based on the stats. Mark 'high' and 'some' relevant e-resources that are weakly used as ones to target for training and promotion action.

NOTE
If many of your e-res in the 'marginal' category then examine whether your library is subscribing to the most appropriate EPIC package

4. Existing Service Levels & Practice

A check on the match of understood information service policy vs. actual service practice with regard to staff use and promotion of e-resources.

Assess Service Practice

- Establish if there is a written or clearly understood policy on level of information service. If not public libraries could draw from the *Standards for NZ Public Libraries*; special libraries infer from SLAs, corporate plans... Note what this indicates as expected or assumed service levels for provision of information from e-resources.
- 'Field test' actual service practice by asking service/desk staff:
 1. What you typically do if a user asks for help with x topic(s)
[select 1-2 topics that clearly require e-resources use]
 2. How you respond if a user requests assistance with finding a...
[select a request that requires a physical source].
- Compare the comparative levels of indicated service for each context: there should be the same degree of assistance provided if service practice is consistent. If they are distinct (eg. e-resources service is not as full or 'hands-on') then note issues to raise around awareness, confidence and training.

You are now ready to compile your notes and data into a summary review and determine priorities for action.



Summary Review Report

Your score card and action list.

Organise

Gather all notes, observations and comments from your health check. Identify those that imply or require some action or at least discussion. Group them into three broad areas:

- Access – issues relating to how your e-resources are described, made available or perceived by users
- Promotion – issues relating to making staff /users more aware of the e-resources and their specific value
- Skills Training – issues arising from skills, confidence and/or service level inconsistencies in using the e-resources.

Summarise

Now rewrite the issues in each group as summary issue statements, for example :

A comment such as “I thought the Britannica was like the print version and only for senior students – I didn’t know it had all kinds of stuff that I could use” as: Lack of student awareness of the range of content of EBO.

OR

“I found the steps to get to them too clunky and unreliable and gave up using them with students” as: The process of accessing and logging on to the resources is perceived as slow, not always reliable and discourages live use with students.

Prioritise

Consider each issue statement and assign a priority rating. While there are elaborate ways to do this a simple ‘essential vs. desirable vs. less urgent’ may be adequate. Also note which are potential ‘quick wins’ (i.e. those that are relatively easy and quick to action) compared to those you may have little immediate influence over.

You now have an prioritised summary list of all e-resource constraints. The following sections of the Toolkit (II – IV) will assist you to develop specific responses and solutions.

Resources

eVALUED toolkit to ‘support tertiary institutions in the evaluation of electronic information services’ [Includes guidance, case studies and models of survey forms] :

<http://www.evalued.bcu.ac.uk/index.htm>

Dartmouth College Library Usability testing Reports [Examples of usability testing practice including for e-resources]: <http://www.dartmouth.edu/~dlmg/UserAssessment/reports/>

