

Collaborative Efforts to Develop Best Practices in Assessment: A Progress Report

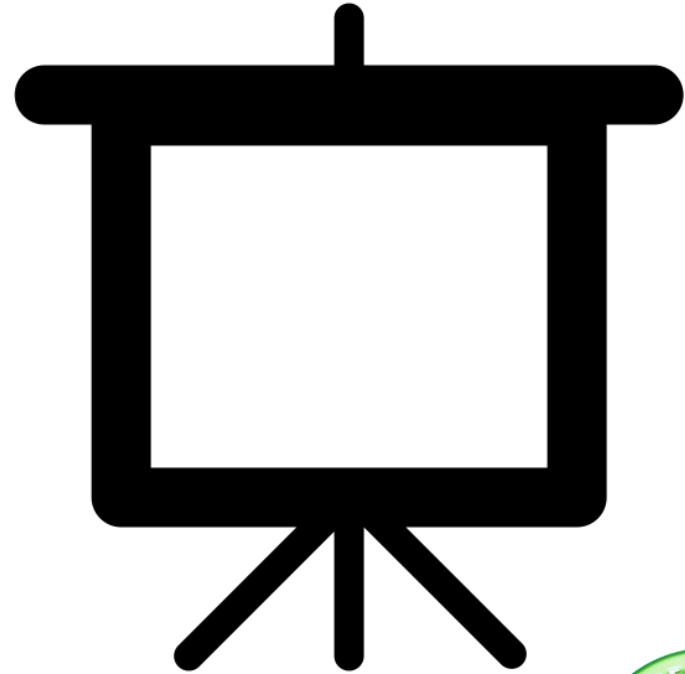
DLF Assessment Interest Group

2015 DLF Forum
Vancouver, B.C.
October 26, 2015



Presentation Outline

1. Introductions
2. Users Studies Working Group
3. Analytics Working Group
4. Citations Working Group
5. Cost Working Group
6. Questions



Created by ARudmann
from Noun Project



Speakers

- **Santi Thompson**, University of Houston Libraries: **User Studies**
- **Molly Bragg**, Duke University Libraries: **Analytics**
- **Elizabeth Kelly**, Loyola University New Orleans: **Citations**
- **Joyce Chapman**, Duke University Libraries: **Costs**



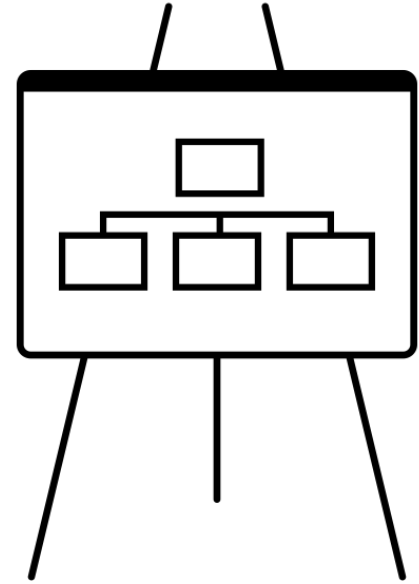
Important Reminders

- Lunch tomorrow: 12:15, Salon E
- Google Group: digital-library-assessment <http://bit.ly/1G6EWQp>
- Wiki: <http://wiki.diglib.org/Assessment>
- Community notes today: <http://bit.ly/1LHpZqE>



User Studies Working Group

1. Goal of Project
2. Methodology
3. Results and Recommendations
4. Next Steps



Created by José Manuel de Laá
from Noun Project



Goals

Assessing Value!



Created by parkjisun
from Noun Project



Scope

- User and Usability Studies
- Return on Investment
- Content Reuse



Created by Lemon Liu
from Noun Project



Examining the literature

1. What research strengths exist in the areas of usability, ROI, and reuse assessment in digital libraries?
2. What gaps exist in these areas of focus?
3. What are possible next steps for the community to address?

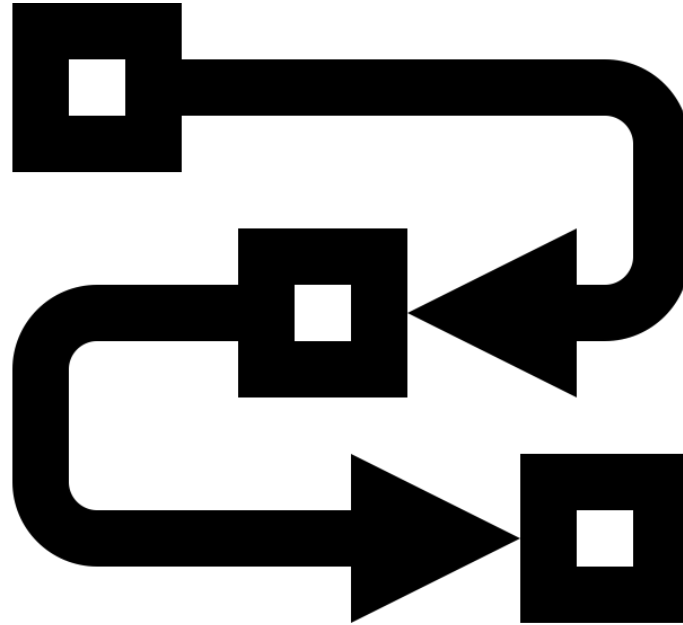


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from Noun Project



Methodology

- Bibliography Sub-Group
- Literature Review Sub-Group
- White Paper Sub-Group



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from Noun Project



Bibliography Sub-Group

- Literature Search
- Literature Scope: 2010-2014*

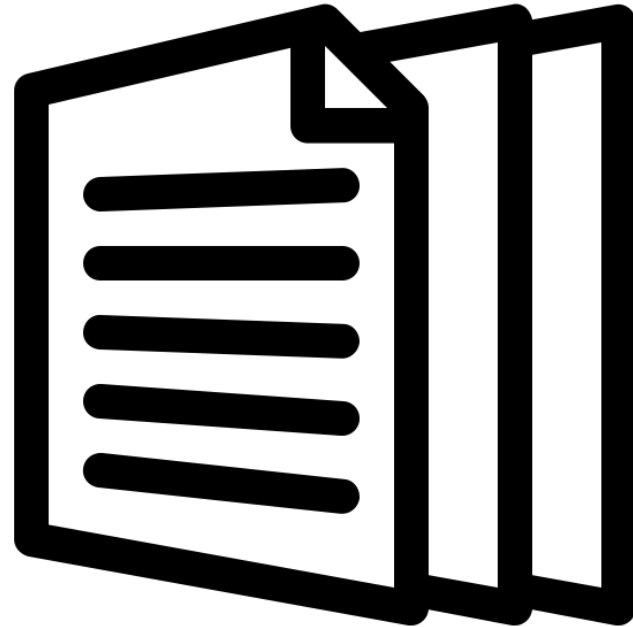


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Literature Review Sub-Group

- Tagging Process
- Generating Reports
- Analyzing Data



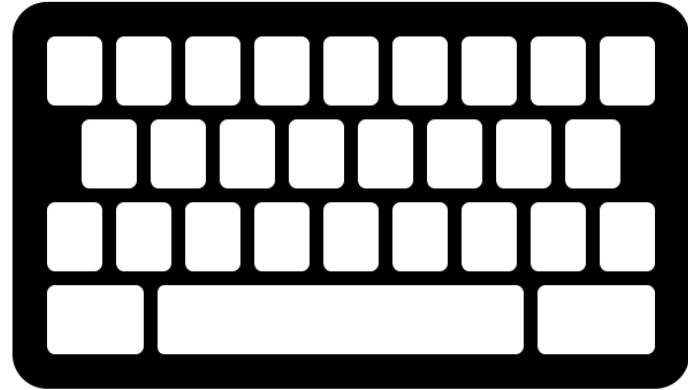
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White Paper Sub-Group

- Writing Team

- Reviewing Team



Created by Roger Dean Oldén
from Noun Project



Results

- User and Usability Studies
- Return on Investment
- Content Reuse



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from Noun Project



User and Usability Studies

Strengths	User-centered design and assessment	Design strategies through user search behavior	
Research Gaps	Behavioral observations and examination of user's' task context	Over-reliance on standard testing tasks and user feedback	Lack of studies on user interactions
Recommendations	Users' research needs	User's role in system development	Cross-institutional collaboration to normalize usability methods

Return on Investment

Strengths	Measurement of time and cost for processing	Theoretical application of ROI to library project management	
Research Gaps	Benefits of cost/benefit analysis	Limited corpus of cost data	No standard methodology for implementation
Recommendations	More studies	More data	More tools

Content Reuse

Strengths	Reuse among humanities-focused digital repositories		
Research Gaps	Patterns of reuse	Web log analysis	Non-digital reuse
Recommendations	User groups -- science and social science	Digital repository interface and reuse	Assessment framework

Next Steps

- Documenting best practices?
- Generating assessment toolkit (s)?
- Lunch tomorrow :)



Created by Andrea Verzola
from Noun Project



Review White Paper: “Surveying the Landscape:
Use and Usability Assessment of Digital Libraries”

<http://bit.ly/1KzCU6S>



THANK YOU!!

Joyce Chapman, Duke University

Jody DeRidder, University of Alabama

Megan Hurst, Athenaeum21 Consulting

Elizabeth Joan Kelly, Loyola University New Orleans

Martha Kyrillidou, Association of Research Libraries

Caroline Muglia, University of Southern California

Genya O’Gara, Virtual Library of Virginia

Ayla Stein, University of Illinois at Urbana-Champaign

Santi Thompson, University of Houston

Rachel Trent, George Washington University

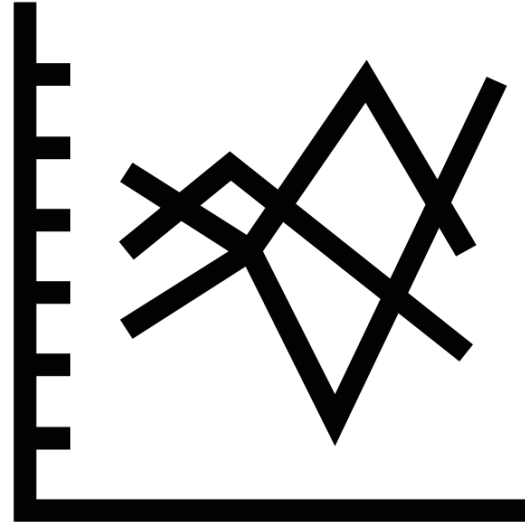
Liz Woolcott, Utah State University

Tao Zhang, Purdue University



Analytics

- Goal and Scope
- White Paper Methods and Recommendations
- Next steps



Goal

- Develop analytics guidelines / best practices for DLF community
- The white paper is online!
 - <http://wiki.diglib.org/Assessment:Analytics>

Scope

- Focus on Google Analytics
- Guidelines for all experience levels



White Paper: Why Best Practices?

Literature review reveals:

- Gap in best practices
- “How-to” analytics literature covers: use analytics to improve usability and discoverability, set-up google analytics (case studies), and complete transactional log analysis



White Paper: Metrics Methodology

1. Choose metrics to recommend
2. Define each metric
3. Importance of metric
4. Bolster definition with library-centric examples

Caveat: metrics require interpretation by local organization to be relevant and actionable.

<http://wiki.diglib.org/Assessment:Analytics>



Baseline Google Analytics Metrics Recommendations

A. Content Use and Access Counts

1. Content Use and Access Counts Defined
2. Site Content Reports
3. Bounce Rate
4. Download Counts
5. Time
6. Pageviews
7. Sessions

B. Audience Metrics

1. Location
2. Mode of Access
3. Network Domain
4. Users

C. Navigational Metrics

1. Path Through the Site
2. Referral Traffic
3. Search Terms

<http://wiki.diglib.org/Assessment:Analytics>



White Paper: More than Metrics

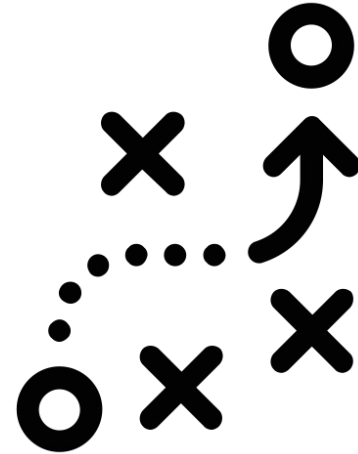
- Approaching analytics: know thyself
- Alternative tools and methods: consider trade-offs between tools and methods
- Going beyond the baseline: customization and platform specific considerations



Next Steps

Options options options

- More platform specific metrics?
- More examples?
- Share metrics?
- Discontinue the analytics group?
- Share your thoughts through the google group or email us!



Thank You!!

Authors:

- Molly Bragg (Co-coordinator of the Analytics Working Group), Duke University Libraries
- Joyce Chapman (Co-coordinator of the Analytics Working Group), Duke University Libraries
- Jody DeRidder, University of Alabama Libraries
- Rita Johnston, University of North Carolina at Charlotte
- Ranti Junus, Michigan State University
- Martha Kyrillidou, Association of Research Libraries
- Eric Stedfeld, New York University

Contributors:

- Bennett Ponsford, Texas A&M Libraries
- Chad Haefele, University of North Carolina Chapel Hill

Commentors:

- Sherri Berger
- Brian Dietz
- Cristela Garcia-Spitz
- Lisa Gregory
- Corey Harper
- Bethany Nowviskie
- Amy Rudersdorf
- Lauren Work
- and more!



Citations Working Group

1. DLF AIG Charge
2. Background Discussion
3. Timeline and Methodology
4. Recommendations
5. Next Steps



Citations Working Group

DLF AIG Charge

1. What should a citation consist of?
2. How can we best support appropriate citations?
3. To what extent do common citation formats support this?
4. What are the limitations of current digital library software systems for displaying citation information?
5. What are best practices for displaying citation information for reference manager software capture?



Citations Working Group

DLF AIG Charge

Outcome: Draft citation standards, based on what can and can't be incorporated into APA, Chicago, and MLA, that incorporate the necessary elements for digitized special collections and institutional repository content



Citations Working Group

Background Discussion

- Data repositories
- Focus on Humanities citation styles
- Item-level vs collection-level description
- PURLs
- Citation managers
- Google Scholar



Citations Working Group

Methodology and Timeline

- Data set citations
- Archival/manuscript citations
- Web/electronic document citations
- Institutional citation recommendations
- Citation Styles
 - APA
 - Chicago (Notes and Bibliography)
 - MLA



Citations Working Group

Methodology and Timeline

- March 6 - April 3, 2015: Comments solicited on first draft
- April 9 - April 24, 2015: Second round of commenting
- June 23, 2015: Final draft released
- **October 26, 2015: Final draft presented at DLF**



Citations Working Group

Recommendations

Include:

- Item name or title
- Collection name
- Repository information (physical and/or digital)
- Unique identifier (Digital Object Identifiers (DOI), Handle, Persistent Uniform Resource Locators (PURL), citable URL, etc.)



Citations Working Group

Next Steps

For these guidelines:

- Publication
- Adoption
- Advocacy



Citations Working Group

Next Steps

For Citations:

1. What should a citation consist of?
2. How can we best support appropriate citations?
3. To what extent do common citation formats support this?
4. **What are the limitations of current digital library software systems for displaying citation information?**
5. **What are best practices for displaying citation information for reference manager software capture?**
6. **?**



Citations Working Group

Commenters

- Geoffrey Bilder
- Bianca Crowley
- Jody DeRidder
- Kevin Hawkins
- Stacy Konkiel
- Martha Kyrillidou
- Bill Landis
- Elliot D. Williams



Cost Assessment Working Group

- Goals
- Process & products
- Call for data



Cost Assessment Working Group

- **Goals**
- Process & products
- Call for data

To aggregate and make freely available a large set of time/cost data on the performance of various tasks involved in the digitization process, in order to assist organizations in digitization project planning and benchmarking.



Cost Assessment Working Group



Library Digitization Cost Calculator

calculator | notes on data | feedback / data submission

This calculator aggregates available data on the cost and time it takes to perform various activities associated with library digitization. The calculator provides estimates not accuracy, as each institution is different. The tool provides average time and cost information from other institutions who have donated their data to this project. Data is currently limited. This calculator was built by Joyce Chapman, please contact joyce.chapman@duke.edu for more information, or use the [feedback form](#).

Types of scanner

Extent (linear feet) Assumed: 1 lf = 1,200 scans

Hourly pay of student workers E.g., 10.25

Student benefits as % of pay E.g., 20.3

Annual salary of staff member E.g., 45000

Staff benefits as % of pay

Metadata creation

Average number of scans per item

Include fastener removal? Yes Calculations will be for removing fasteners from 100% of items

Include condition review? Yes Flagging/pulling materials to be sent to conservation department.

Include intellectual property review? Yes Calculations will be for review of 100% of items

Include time to sort materials into items? Yes E.g., locate pp. 1-5 of a discrete document and place them together

Include flattening/supporting materials pre-scanning? Yes This will be calculated as if it were done for 100% of items

Include time for fragile item handling? Yes This will be calculated as if 100% of items are fragile

Include time for disbinding and rebinding items? Yes This will be calculated as if it 100% of items need disbinding



Cost Assessment Working Group

- Goals
- **Process & products**
- Call for data



Cost Assessment Working Group

Process & products

- [Beta version of the Digitization Cost Calculator](#), October 2014
- [Bibliography](#), May 2015
- [Processes & definitions for cost assessment data collection](#), June 2015
- [Wireframes](#) for the Digitization Cost Calculator 2.0, August 2015
- **Digitization Cost Calculator 2.0 (we need more data first!)**



Cost Assessment Working Group

Guidelines and definitions (1 of 2)

- Preparation of original materials
 - Condition review
 - Disbinding
 - Fastener removal
 - Flattening
 - Rights review
 - Sorting materials into items
 - Supporting
 - Unique identifier assignment
- Image capture
 - Film or transparency scanner
 - Flatbed scanner
 - Manual DSLR camera
 - Medium format camera
 - Overhead scanner
 - Sheet feeding scanner



Cost Assessment Working Group

Guidelines and definitions (2 of 2)

- Quality control
 - Level 1, 2 or 3
- Descriptive metadata creation
 - Level 1, 2 or 3
- Post-processing
 - Alignment/rotation
 - Background removal
 - Clean up / dust removal
 - Color correction and tonal adjustments
 - Cropping images
 - Stitching
- Post-preparation
 - De-sorting
 - Re-binding
 - Re-fastening



Digitization Cost Calculator

calculator	notes on data	feedback/data submission
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Extent to digitize

People performing the work

Salaries 1

Hourly 1

.....

Preparation of original materials

Condition review

Disbinding

Fastener removal

.....

Image capture

Capture device

Quality control

Level 1
 Level 2
 Level 3

Post-processing

Alignment/rotation

Background removal

.....

Local Fields

Local field 1

Local field 2

Digitization Cost Calculator

calculator	notes on data	feedback/data submission
------------	---------------	--------------------------

Results

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Activity	Time (hours)	Cost (Salary 1)	Cost (Hourly 1)...
Fastener removal	10.3	N/A	\$\$\$
Image capture	34.7	\$\$\$	\$\$\$
Metadata creation	02	\$\$\$	N/A
.....
Total	105	\$\$\$\$	\$\$\$\$

Cost Assessment Working Group

Call for data submissions

- [Call for data submissions](#) (a document that explains what we're doing and tells you how to contribute your data)
- [Data submission form](#) (the actual online form for submitting data), or just copy this link <http://bit.ly/1LV9oxl>

All data submitted to this project will be publicly available, both via aggregate calculations made by the calculator, and by institution on a separate reference page of the calculator's website.



Cost Assessment Working Group

Call for data submissions

- What amount of data do I have to submit?
- What format do I submit the data in?
- How difficult is the data submission process?
- How does the calculator work / how will my submitted data be used?



Cost Assessment Working Group

Thank you to our working group!

- **Joyce Chapman**, Duke University
- **Kinza Masood**, University of Utah
- **Chrissy Reissmeyer**, University of California, Santa Barbara
- **Dan Zellner**, Northwestern University



Cost Assessment Working Group

Thank you to those who have contributed data so far!

- Brown University
- Duke University
- Getty Institute
- Northwestern University
- Triangle Research Libraries Network, NC
- University of Alabama
- University of California, Irvine
- University of Miami
- University of Montana
- University of Virginia



Questions?

- Santi Thompson, User Studies: sathompson3@uh.edu
- Molly Bragg, Analytics: molly.bragg@duke.edu
- Elizabeth Kelly, Citations: ejkelly@loyno.edu
- Joyce Chapman, Costs: joyce.chapman@duke.edu



Important Reminders

- Lunch tomorrow: 12:15, Salon E
- Google Group: digital-library-assessment <http://bit.ly/1G6EWQp>
- Wiki: <http://wiki.diglib.org/Assessment>

