LIBRARIAN EDUCATION FOR THE COLLECTION, ANALYSIS, AND USE OF LIBRARY NETWORKED SERVICES AND RESOURCES STATISTICS

FINAL REPORT

June 1, 2005

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INTRODUCTION

This report summarizes project activities between November 2004 and June 2005, and includes an overall project wrap-up. During the final months of the project, the research team:

- Finalized the E-Metrics Instructional Website (EMIS, http://www.ii.fsu.edu/emis);
- Publicized the EMIS project through announcements to communities of interest; and
- Continued working with key constituencies (e.g., PLA's statistics committee, which oversees the PLDS annual public library survey) to integrate e-metrics and EMIS into those communities.

These various efforts formed the core activities of the project during this time period. Additional information regarding the development of EMIS is available in Interim Reports I-IV, and will not be reviewed in this final report.

ABOUT EMIS

EMIS provides online instructional modules that would help practitioners know about their database use, digital reference services, and other selected services and resources. EMIS is also expected to assist public librarians, state library agency staff, and library consortia staff to better understand how to evaluate the use and uses of their online library services and resources; and provide assistance and continuing education for those seeking to use e-metrics in their library.

EMIS is freely and openly available to the public at http://www.ii.fsu.edu/emis. It is a self-contained instructional system that provides those who access it with:

- Information regarding selected e-metrics (network statistics and performance indicators);
- Tips and guidance on how to use e-metrics in public libraries;
- Assistance with the collection and analysis of e-metrics-based data;
- Interpreting e-metric data;
- Using e-metric data for advocacy purposes in the communities that libraries serve; and
- Links to other resources.

Thus, EMIS offers a variety of practical solutions on the collection and use of e-metrics for public librarians.

Organization of EMIS

The EMIS modules are divided into three major groups:

- Introductory modules - This includes modules that orients users to the EMIS web site and introduces the e-metrics to users who are new to e-metrics;
- "How to" modules - Whether adapting national e-metrics or developing them locally, a good understanding of the measurement process issues involved helps. EMIS "how to" modules offers content that follows the measurement lifecycle; and

- Recommended modules - EMIS recommends core e-metrics and provides training modules to make adoption easier, more standardized and more effective.

EMIS also provides other resources such as:

- E-metrics Catalog - A catalog of the e-metrics that have been standardized and field tested to date;
- E-Metrics Annual Report Templates - A collection of Microsoft Office templates and samples to assist users in the creation of their own E-metrics Annual Report; and
- E-metrics Resource list - A list of helpful resources related to e-metrics which includes online and physical resources.

These additional resources provide those who access the site with useful additional information regarding e-metrics, as well as tools for immediate use within their libraries.

Introductory Modules

There are two introductory modules, *Introduction to EMIS* and *Introduction to E-metrics*. These modules introduce users to the concept of e-metrics and guide them through use of this site. *Introduction to EMIS* module provides pointers to users on how to navigate the EMIS web site and make use of the features available on the web site efficiently. The *Introduction to E-metrics* module provides basic descriptions on what e-metrics are and how and why it is useful for libraries to collect them.

"How to" Modules

Not all e-metrics are developed at state or national levels (ARL, NCES or NISO). Sometimes the best measures of local library activities come from local library managers. However, whether adapting national e-metrics or developing them locally, a good understanding of the measurement process issues involved helps. Therefore, EMIS offers training modules that follow the measurement lifecycle, from:

- E-metric selection;
- E-metric data collection;
- E-Metric log analysis;
- E-metric data analysis; and
- E-metric use & presentation.

Each module identifies objectives and presents key issues that need to be addressed during each measurement stage. Each of the modules has substantial content, review questions to measure the achievement of the objectives, quick links to access the external files such as additional charts, forms, checklists etc. and a listing of resources used to develop the module.

The Recommended Modules

There are already hundreds of e-metrics available. EMIS recommends the following core e-metrics to be collected by most libraries: *Virtual Reference Transaction, Virtual Visit, User Training, Number of Public Access Workstations Users, Number of Public Workstations, Sessions, Units/Records Examined, Searches, Electronic Access Expenditures and Electronic Materials Expenditures.*

Each core e-metric training module is organized the same way, offering:

- Objectives;
- Definition;
- Preparing your library;
- Procedure for data collection;
- Data Analysis (strategies and measures);
- Using the results for management and library promotion;
- Selected issues; and
- Resources.

Each of the modules has substantial content, review questions to measure the achievement of the objectives, quick links to access the external files such as additional charts, forms, checklists etc and a listing of resources used to develop the module.

Other Resources: E-Metrics Catalog

In addition to the recommended core e-metrics, there are a number of other standardized and field tested e-metrics that have been developed for specialized uses. EMIS offers an e-metrics Catalog that tries to identify all of the standardized and field tested e-metrics that have been developed for libraries. The e-metrics catalog offers an E-metrics Catalog by Name, that is an alphabetical listing by e-metrics name and an E-metrics Catalog by Subject along with a list of the references consulted. Each catalog entry consists of the:

- E-metrics name;
- Standardized definition;
- Resources including source(s) where found;
- Subject headings used for the e-metrics in the catalog.

This enables users to pursue other e-metrics that may be of use to them in their libraries.

Others: Submit Modules to EMIS

A template is also provided to other prospective module developers to submit modules to EMIS. This template can be downloaded and edited. In this template, prospective module writers are introduced to the structure of a module and then presented with the formatting issues that are involved in the development of the modules.

Selected Features in EMIS

Login and Confidentiality

Users can view the online modules even if they are not logged in. However, if users are logged in, they will get the maximum benefits of the features built in on the web site such as:

- Being able to plan their study by selecting and organizing their favorite modules in the Favorite Modules section. They will need to check the modules that they would want to include as their favorite modules when they view the complete listing of modules under introductory, "how to" and recommended modules list.
- The system is able to detect the last page that the users have visited and in their next visit, they can directly access the last page that they have visited.
- Be able to assign module completion status to each of the module selected as favorite module.

Favorite Modules Page

In this page, users can

- View the complete module list and be able to add or remove the list of current modules that they want to study;
- View the record of their completed modules practice sessions' scores;
- Access directly the last page that they have visited in their previous visit to EMIS; and
- Click on a module that will take them directly to the content of the module.

This feature will help users customize their EMIS experience.

Module Page

Each module will have a presentation, a review session and quick links to supporting documentation used in the module.

- Users can start viewing the module by clicking on the "Start" link or they can go directly to a specific content of the module by clicking on an item on the list of table of content;
- Users can also take the review/practice session for each module by clicking on "Take Review Session" under the Options header; and
- Users will also have direct access to documents and URLs referenced in this module, by clicking on the list under the "Quicklinks".

Administrative Interface for EMIS

EMIS also has an interface for administrators with the ability to:

- Continue adding categories for module, units and rename current modules or even inserting new modules;

- Insert/edit new content for modules by using a WYSIWYG interface;
- Insert/edit catalog entries for the E-Metrics Catalog section, in a template form; and
- Insert/edit resources for E-Metrics Resource List by using a template form.

This will facilitate the updating and continued development of EMIS.

Revisions Done to EMIS after Interim Report IV

The following are the major revisions done to the EMIS web site after the submission of Interim Report 3, which is between November 1 2004 and May 1, 2005:

- The following core e-metrics instructional modules and practice sessions for each modules were added in the EMIS web site:
    o Virtual Visits;
    o Electronic Materials Expenditures;
    o Electronic Access Expenditures;
    o Number of Public Access Workstations;
    o Number of Public Access Workstations Users;
    o Units / Records Examined;
    o Sessions; and
    o Searches / Menu selections.
- The following introductory modules were added in the EMIS web site:
    o Introduction to EMIS; and
    o Introduction to E-Metrics.
- The following additional modules to help users understand the measurement cycle for e-metrics were also added in the EMIS web site:
    o E-Metrics Selection;
    o E-Metrics Data Collection;
    o E-Metrics Log Analysis;
    o E-Metrics Data Analysis; and
    o E-Metrics Use & Presentation.
- E-metrics Resource List has also been updated and ordered by subject categories and also can be viewed alphabetically.
- E-metrics Catalog list has been developed.
- Revisions were done on the interface and the delivery of the instructional materials based on the input obtained via the in-person training sessions conducted.

With these revisions, the EMIS system is complete and ready for use by public libraries, state libraries, and other interested communities.

NEXT STEPS AND SUSTAINABILITY

The Information Institute is committed to updating, adding, and improving EMIS over the next two-year period. We will work with the library community to enhance EMIS to meet the needs of both practitioners and decision makers to ensure that data regarding network-based services are available for decision-making, policymaking, and research purposes. The creation

of EMIS is an important first step in the ability to provide public librarians with a place to go for current, useful, and practical information regarding the measurement and evaluation of network-based services and resources.

In addition, the Institute will continue to work with key constituencies to ensure access to EMIS and e-metrics information. These groups and/or resources include WebJunction, the state data coordinators in state library agencies, the PLA statistics committee, the ALA Office for Research, and the National Information Standards Organization (NISO). Through these efforts, the Institute will work to keep EMIS on the forefront of e-metrics development, collection, and use in public libraries.

Finally, the Information Institute offers additional training to the public library community that combines EMIS and e-metrics expertise of Institute staff. Such training focuses on assisting public libraries derive the most from EMIS as well as the development of customized e-metrics evaluation programs.