GALE TRAINING EVALUATION, 2009-2010:

INTERIM REPORT OF PROJECT ACTIVITIES

(December 1 – December 31, 2009)

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As part of an ongoing assessment process, the Information Use Management & Policy Institute (Information Institute) of Florida State University, College of Communication & Information, School of Library & Information Studies, has been engaged in a number of activities to accomplish specific tasks related to the goals described below as well as the larger goals of the FEL.[1] This interim report provides a summary of project activities to date, descriptions of projected activities for the remainder of the project (January 1, 2010 – June 15, 2010), as well as issues for discussion at the next meeting between the Information Institute project team, Mark Flynn at the State Library & Archives of Florida (State Library), and representatives from Gale-Cengage Learning (Gale), to be held in Boston at ALA Midwinter, January 2010. Discussion of completed and projected work for the evaluation Gale training and marketing effort is divided among the three tasks outlined in the project SOW.

Task 1: Measuring Usage of FEL-Gale Resources

The Information Institute will make both preliminary and post-training usage assessments of FEL-Gale resources. The purpose of this task is to determine the degree to which the Gale training program results in increased usage of FEL-Gale resources by Florida public libraries. Table 1 provides and overview of activities completed to date and a tentative time line for completion on ongoing project activities.

Table 1. Key Activities, Status, and Time Line to Completion for Task 1

ACTIVITY	STATUS UPDATE	TIMELINE
1. The Information Institute project team conferred with Gale (i.e., Nader & Sharon) and the State Library (i.e., Mark Flynn) on November 24, 2009 regarding available statistics to determine the following: • Statistics that can be used as output measures (e.g., page views, citation views, document retrievals, search terms, etc.), • Time frame within which these statistics can be collected (e.g., daily, weekly, or monthly), and • Degree to which these statistics can be collected separately for library staff vs. library patrons (if possible).	The November 24 meeting was successful, the Institute was granted access to Gale's statistics portal to view and track usage statistics, and the project team made the following determinations: • Available statistics for output measures: Total sessions, total and average connect time, total full-text, total retrievals, and total searches, all available by database title or by individual library and then by database title, • Available time frames for collection of statistics: All pre-determined possible time frames are possible, and the Institute will analyze data on weekly and monthly bases, and • It is not possible to collect usage statistics separately for library staff vs. library patrons, but the Information Institute will analyze data separately for access from inside and outside the library.	*Activity 1 is complete*

[1] See http://www.flelibrary.org/about/FEL-Stratetic-Goals2008-09.pdf

Table 1. Key Activities, Status, and Time Line to Completion for Task 1 (Continued)

ACTIVITY	STATUS UPDATE	TIMELINE
2. Select and define statistics – • Determine which of the available statistics are most applicable to this project, and • Define and operationalize chosen statistics.	The Information Institute has made the following determinations: • Selected statistics: Total sessions, total and average connect time, total full-text, total retrievals, and total searches, and • Defining and operationalizing statistics will occur after the January 2010 meeting with Mark Flynn and Gale at ALA Midwinter.	_January 2010_: Define and operationalize statistics after discussion with Mark Flynn and Gale representatives
3. Gather benchmark data from Gale and the State Library	On track to begin January 2010	_January 2010_
4. Gather monthly usage statistics – • Obtain monthly page views, retrievals, and other statistics for selected FEL-Gale databases over the course of the training, and • Advise the state library if additional usage data analysis is needed (e.g., relating usage from specific public libraries to training efforts	On track to begin February 2010	_February 1, 2010 – May 31, 2010_
5. Produce final report – • Detailing the changes in usage based on the data collected during the first year of the training program, and • Recommending modifications and actions for program Year 2	On track to begin June 2010	_June 1 – 15, 2010_

This task will result in data to determine if Project Goal 1 was met, increased usage of FEL-Gale resources, a question that will be addressed in the final report.

Task 2: Assessing Effect of FEL-Gale Training Program on Usability

The Information Institute will make post-training assessments of what Gale terms "usability." Focus group evaluations will assess the degree to which the Gale training program provides library staff with the ability to "become self-sufficient when using the FEL products" and "to train others (staff and community), using the FEL training program."[2] Key activities and a tentative time line for Task 2 are delineated in Table 2.

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[2] Bastion, J. F. (2009). _FEL Marketing and Training Recommendations Report and Work Plan_. Farmington Hills, MI: Gale Cengage Learning, p. 3.

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Table 2. Key Activities, Status, and Time Line to Completion for Task 2

ACTIVITY	STATUS UPDATE	TIMELINE
1. With the assistance of Gale and the State Library, define "self-sufficiency" and "to train others" in relation to usage of FEL-Gale resources: • Define and operationalize these terms for this project: self-sufficiency and "to train others,"	Through the November 24 meeting, the Information Institute made the following determinations: • Defintions are as follows: **_Self-sufficiency_** is the ability of library staff to complete SPECIFIC TASKS using only the Gale tools (including the help tool) and without help from another person, and Gale agrees to remove the language referring to "**_To train others_**" from marketing and training plan; Operationalization is on hold pending receipt of a list of specific tasks from Sharon,	_January 2010_: Receive list of specific tasks from Sharon and operationalize "self-sufficiency," and make final determination of method of measuring "self-sufficiency"
• Determine how the definition of "self-sufficiency" differs for library staff vs. library patrons, and • Determine the degree to which "self-sufficiency" and "to train others" can be measured through focus groups, or other methods (e.g., number of support calls to Gale before and after training, number of times staff asks other staff for assistance, etc.).	• Patrons are not a concern for Year 1 of the training effort, so this issue has been tabled for now, and • Possibilities are still being considered, but the Information Institute is leaning towards reliance on the self-assessments built in to the Gale training program and librarian self-assessments administered via survey methodology	
2. If necessary based on Activity 1, devise additional data collection methods that can measure better "self-sufficiency" and "to train others" (e.g., number of support calls to Gale before and after training, number of times staff asks other staff for assistance, etc.); Methods under consideration: • Librarian self-assessments, • Gale quizzes built into self-paced modules, • Institute conducts unobtrusive testing, possibly on Ask a Librarian reference librarians, and • Track one person's path using the Gale resources through detailed logfiles	The Information Institute has made the following decisions (based on conversations with Mark Flynn and Gale representatives): • Probably will use, and Information Institute needs to develop appropriate survey instrument, • Will use (Gale needs to collect), • Given time and funding constraints, this method is not possible at this time, and • Not possible because of lack of access to detailed logfiles	_January 1 – February 28, 2010_: Develop librarian self-assessment instrument _March 1 – April 30, 2010_: Administer librarian self-assessment and receive Gale quizzes _May 2010_: Analyze data gathered from librarian self-assessments and Gale quizzes _June 2010_: Include in final report
3. Conduct data collection activities – • Librarian self-assessments, and • Gale quizzes built into self-paced modules.	On track to begin January 2010	_January 1 – April 30, 2010_
4. Analyze librarian self-assessment and Gale quiz data	On track to begin May 2010	_May 2010_

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Table 2. Key Activities, Status, and Time Line to Completion for Task 2 (Continued)

ACTIVITY	STATUS UPDATE	TIMELINE
5. Produce final report – • Detailing the outcomes of the Gale program in training library staff to become self-sufficient and able to train others in the use of FEL-Gale resources, and • Recommending modifications and actions for program Year 2.	On track to begin June 2010	_June 1 – 15, 2010_

This task will assess Project Goal 2, or the extent to which the Gale training program results in library staff that are able to be self-sufficient in using FEL-Gale resources and to train others using the Gale training program.

Task 3: Identifying Awareness of FEL-Gale Resources

The Information Institute will make both preliminary and post-marketing awareness assessments of FEL-Gale resources. The purpose of this task is to determine the degree to which the Gale marketing plan affects awareness of FEL-Gale resources. Key activities and a tentative time line for Task 3 are delineated in Table 3.

Table 3. Key Activities, Status, and Time Line to Completion for Task 3

ACTIVITY	STATUS UPDATE	TIMELINE
1. Conduct targeted, telephone interviews with public librarians for a pre-marketing program score of awareness.	After the November 24 meeting and subsequent discussion among the Information Institute project team, the following course of action was selected: • Select a random sample of Florida public libraries for telephone interviews, and • Conduct telephone interviews by calling the libraries' Reference Desks and recruiting librarians to participate in pre-marketing interviews. Because users not the focus of Year 1 marketing effort, no attempt will be made to interview users regarding their awareness of FEL-Gale resources.	_January 1 – 10, 2010_: Select random sample and obtain phone numbers and service hours of the corresponding libraries' Reference Desks _January 11 – February 15, 2010_: Conduct telephone interviews
2. Analyze pre-marketing interview data to determine Florida public librarians' pre-marketing level of awareness of FEL-Gale resources.	On track to begin mid-February 2010	_February 16 – 28, 2010:_ Analyze phone interviews for pre-marketing level of awareness

Table 3. Key Activities, Status, and Time Line to Completion for Task 3 (Continued)

ACTIVITY	STATUS UPDATE	TIMELINE
3. Conduct post-marketing phone interviews with public librarians and target groups of Florida residents to assess degree of increased awareness of FEL-Gale resources after completion of the Gale marketing program – • Select a new random sample of Florida public libraries, and • Conduct telephone interviews by calling the libraries' Reference Desks and recruiting librarians to participate in pre-marketing interviews.	On track to begin April 2010	_April 1 – May 15, 2010_
4. Analyze post-marketing interview and focus group data	On track to begin mid-May 2010	_May 15 – June 1, 2010_
5. Produce final report – • Detailing any changes in awareness levels of FEL-Gale resources, and • Recommending modifications and actions for program Year 2	On track to begin June 2010	_June 1 – 15, 2010_

The intent of this task is to address Project Goal 3 and measure the effect of the Gale marketing plan on FEL awareness.

Issues for Discussion at ALA MIDWINTER

The following issues remain unresolved, and need to be discussed at the meeting scheduled for Friday, January 15, 2010 at ALA Midwinter:

- Defining the usage statistics: Does Gale and/or the State Library already have definitions for total sessions, total and average connect time, total full-text, total retrievals, and total searches, and if not do they have a preference for how the Institute defines and operationlizes them for the purposes of this evaluation;
- Operationalizing "self-sufficiency" with regard to the training effort: The Institute still needs the list of tasks librarians are expected to be able to complete by themselves after attending the trainings from Sharon, and is there a way to identify only librarians who have completed the training to recruit for the self-assessment instrument;
- How can the Institute gain access to the results of librarians' quizzes from the self-paced training module, for purposes of evaluating their "self-sufficiency" post-training;
- To what degree can the various datasets (Forsee, Google, Gale, State Library, and others (?) be integrated and compared/contrasted.

Attendees at this meeting will include Charles R. McClure and Lauren H. Mandel from the Information Institute, Mark Flynn from the State Library, and Nader Qaimari.