



**GALE-CENGAGE OUTREACH EVALUATION, 2010-2011:
INTERIM REPORT OF PROJECT ACTIVITIES**

(October 1 – December 20, 2010)

December 9, 2010 – **DRAFT**

Charles R. McClure, PhD <cmcclore@lis.fsu.edu>
Director, Information Institute and Francis Eppes Professor

Lauren H. Mandel, <lmandel@fsu.edu>
Research Coordinator

Karen C. Doster, <kcd04d@fsu.edu>
Research Librarian

Lynssey Weissenberger, <lweissengerger@fsu.edu>
Webmaster and Research Associate

For

Mark Flynn,
Director, Florida Electronic Library
Florida Division of Library and Information Services

GALE OUTREACH EVALUATION, 2010-2009: INTERIM REPORT OF PROJECT ACTIVITIES

As part of an ongoing assessment process, the Information Use Management & Policy Institute (Information Institute)¹ of Florida State University, College of Communication & Information, School of Library & Information Studies, has 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.² The Information Institute has received an award from the Florida Division of Library and Information Services (DLIS)³ to conduct an evaluation of Gale-Cengage's outreach efforts. The overall purposes of this project are to (1) support the State Library's goal of meeting the cultural, educational, and information needs of the people of Florida, (2) create a database that provides stakeholders with access to usage and retrieval data, which will help (3) produce data-driven recommendations to guide Gale-Cengage future marketing & promotion efforts.

Five tasks will be completed to meet these purposes:

- Task 1: Identify, collect, and analyze usage and demographic data,
- Task 2: Design outline for interactive database,
- Task 3: Pilot test and make recommendations to refine/improve the database,
- Task 4: Produce recommendations for marketing driven by the collected data, and
- Task 5: Produce draft final report.

This interim report provides a summary of project activities to date. Discussion of completed and projected work for the evaluation of Gale-Cengage outreach efforts is divided among the five tasks outlined in the Project Tasking (Appendix A).

Task 1: Identify, Collect, and Analyze Usage and Demographic Data

At the time of this interim report, the Information Institute has complete Task 1 of the Gale Outreach Evaluation Project. This task required members of the study team to select outcomes and variables from Gale database usage reports that previously have been used in projects conducted by the Information Institute for the Florida DLIS, the Gale-Cengage ForeSee satisfaction report data, Google Analytics data for the FEL portal (<http://www.flelibrary.org>), the Florida DLIS Annual Statistical Report, and select key state demographic data sets from the U.S. Census (See Appendix B). These variables will be used in Task 2 to make recommendations for how the DLIS can create a database that will assist in the production of recommendations for the data-driven marketing and promotion efforts for Gale-Cengage (Task 4). Table 1 provides an overview of activities completed to date for Task 1.

¹ <http://www.ii.fsu.edu>

² See <http://www.flelibrary.org/about/FEL-Strategic-Goals2008-09.pdf>

³ <http://dlis.dos.state.fl.us/library/>

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

ACTIVITY	STATUS UPDATE	TIMELINE
<p>1. Collect initial examples of available data:</p> <ul style="list-style-type: none"> • Collect data sets from DLIS, Gale (ForeSee satisfaction survey) , U.S. Census, and Google Analytics; • Request raw data of ForeSee Survey Collect key state, county, and/or city-level demographic data for Florida, including total population, ethnicity, age, and educational attainment. 	<ul style="list-style-type: none"> • Information Institute collected ForeSee Satisfaction report spreadsheet (Excel), survey questions from the Florida DLIS Annual Statistical Report, reviewed Gale usage reports measurements, created a list of demographic variables from the U.S. Census, and identified relevant Google Analytics measurements. • Gale has been unresponsive in regards to giving either DLIS or the Information Institute raw data for the ForeSee Survey.⁴ 	<p><i>Complete</i></p>
<p>2. Identify the available data elements from selected databases and resources.</p>	<ul style="list-style-type: none"> • Data elements were identified from the ForeSee Survey, the Florida DLIS Annual Statistical Report, Gale database usage reports, U.S. Census, and Google Analytics. A complete list can be seen in Appendix B. 	<p><i>Complete</i></p>
<p>3. Develop template for (a) menu of possible data elements to be incorporated into the database, and (b) menu of indicators and measures of FEL usage.</p>	<ul style="list-style-type: none"> • Data elements were identified and compiled into a template to be used for the design of the Access database (Appendix B). 	<p><i>Complete</i></p>
<p>4. Develop criteria for selecting possible data elements and indicators/measures.</p>	<ul style="list-style-type: none"> • Data elements were selected by their ability to be drawn at a state level. In addition the Information Institute team made sure that the indicators could be cross referenced for the database design. Also taken into consideration was the amount and currency of raw data that could be accessed for each measure. 	<p><i>Complete</i></p>
<p>5. Compile possible indicators and measures (including outputs and outcomes) of FEL usage:</p> <ul style="list-style-type: none"> • Collect data sets from DLIS, Gale (ForeSee satisfaction survey) , and Google Analytics; and • Collect key county-level demographic data for Florida, including total population, ethnicity, age, and educational attainment. 	<ul style="list-style-type: none"> • Data will be compiled in January 	<p><i>January 1-31, 2011</i></p>
<p>6. Discuss possible data elements and measures/indicators with State Library of Florida liaison.</p>	<ul style="list-style-type: none"> • The Information Insitute team met with Mark Flynn to discuss measures on both December 1 and December 8, 2010. 	<p><i>Complete</i></p>

⁴ In fact, it is unknown whether ForeSee gives raw data to Gale, so it may not be available at all for purposes of this project.

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

ACTIVITY	STATUS UPDATE	TIMELINE
7. Produce Interim Report detailing project updates and status of tasks.	<ul style="list-style-type: none"> To be given to the State Library Dec. 20, 2010. 	<i>Complete</i>
8. Finalize data elements and measures with Gale and State Library liaison.	<ul style="list-style-type: none"> Meet with Mark Flynn December 1, 2010 to review list of variables. Received feedback, and incorporated them into a new version of the variables document provided to Mark Flynn on December 8, 2010. 	
9. Deliver Final Report of project activities.	<ul style="list-style-type: none"> On track to be delivered June 12, 2011 	<i>June 2011</i>

Summary

To date, the Information Institute has completed the project tasking (Appendix A), proposed draft variables for inclusion in the database, met twice with Florida DLIS liaison Mark Flynn to discuss those variables, and produced a list of variables based on conversations with and feedback from Mark Flynn (Appendix B). The Information Institute is on track to begin Task 2 in January 2011 and to complete the remaining tasks within the project period. The final report will be submitted to the Florida DLIS by June 12, 2011.

APPENDIX A: PROJECT TASKING

**GALE-CENGAGE OUTREACH EVALUATION, 2010-2011
PROJECT TASKING**

This document describes the activities related to each of the five key tasks that the Information Institute will conduct for this initiative during the period October 1, 2010 through June 12, 2011. The following tasking schedule is tentative; the final schedule is dependent on a range of factors.

The project deliverables will be (1) an Interim Report provided to the Florida DLIS and Gale-Cengage on December 31, 2010 that will provide a status update on the overall project and each individual task, and (2) a Final Report provided to the Florida DLIS and Gale-Cengage on June 12, 2011 that will summarize project activities, summarize findings, identify key issues, and make specific recommendations for Gale-Cengage future marketing efforts.

Task 1: Identify, Collect, and Analyze Usage and Demographic Data

During the first phase of the study, members of the study team will select outcomes and variables from usage reports from the Florida DLIS that have been previously used in projects conducted by the Institute for the Florida DLIS, the Gale-Cengage ForeSee satisfaction survey data, Google Analytics data for the FEL portal (<http://www.flelibrary.org>), the Florida DLIS Annual Statistical Report, and select key state demographic data sets. These variables will be used in a later task to create a database that will assist in the production of recommendations for the data-driven marketing and promotion efforts for Gale-Cengage. Key activities and a tentative time line for Task 1 are delineated in Table 1.

Table 1. Key Activities and Time for Task 1

ACTIVITY	TIMELINE
1. Collect initial examples of available data: <ul style="list-style-type: none"> • Collect data sets from Florida DLIS, Gale (ForeSee satisfaction survey) , and Google Analytics; • Request raw data of ForeSee Survey Collect key state level demographic data for Florida, including total population, ethnicity, age, and educational attainment. 	October 1, 2010 – November 30, 2010
2. Identify the available data elements from selected databases and resources.	October 1, 2010 – November 30, 2010
3. Develop template for (a) menu of possible data elements to be incorporated into the database, and (b) menu of indicators and measures of FEL usage.	October 1 – 31, 2010
4. Develop criteria for selecting possible data elements and indicators/measures.	November 1 – 30, 2010

Table 1. Key Activities and Time for Task 1 (continued)

ACTIVITY	TIMELINE
5. Compile possible indicators and measures (including outputs and outcomes) of FEL usage: <ul style="list-style-type: none"> • Collect data sets from Florida DLIS, Gale (ForeSee satisfaction survey) , and Google Analytics; and • Collect key state-level demographic data for Florida, including total population, ethnicity, age, and educational attainment. 	November 1 – 30, 2010
6. Discuss possible data elements and measures/indicators with the Florida DLIS liaison.	December 1 – 31, 2010
7. Produce Interim Report detailing project updates and status of tasks.	December 31, 2010
8. Finalize data elements and measures with Gale and Florida DLIS liaison.	January 1 – 31, 2011
9. Deliver Final Report of project activities.	June 12, 2011

The status of Task 1 will be reported in the Interim Report due December 31, 2010, and the final results will be provided in the Final Report due June 12, 2011.

Task 2: Designing Requirements for Interactive Database

The study team will suggest requirements and design considerations for an interactive database to be developed by the Florida DLIS and/or Gale-Cengage. The requirements will be created based on information collected from the evaluation and analysis of data sets collected in Task 1. Once the outline for the database has been completed it will be given to Mark Flynn at the Florida DLIS to be constructed. The purpose of this database is to provide key stakeholders the ability to access relevant user information to create targeted marketing efforts (Task 4). Key activities and a tentative time line for Task 2 are delineated in Table 2.

Table 2. Key Activities and Time for Task 2

ACTIVITY	TIMELINE
1. Develop requirements for database: <ul style="list-style-type: none"> • Determine set of queries to run in database; • Identify database goals: <ul style="list-style-type: none"> ○ Organize and present FEL usage data, ○ Function to display relevant query results to the user, ○ Display query results in an organized structure depending on the nature of the query (either map, table, or diagram), and ○ Allow user to store queried data in a system of their choosing (give export options: Excel, Word, and PDF); • Define database type (Access database); • Define outputs that will be provided at the state level: stakeholders and indicators per use of capita; • Select data sets to be included in the database; • Define database requirements; and • Identify intended audiences. 	January 1 – 31, 2011

Table 2. Key Activities and Time for Task 2 (continued)

ACTIVITY	TIMELINE
2. Create an outline for the structure of the database.	February 1 – 28, 2011
3. Deliver database outline to Mark Flynn at the Florida DLIS to be constructed.	March 1-16, 2011
4. Deliver Final Report of project activities.	June 12, 2011

Preliminary findings from Task 2 will be provided to the Florida DLIS and Gale-Cengage by March 1, 2011 in order to facilitate development of the database by the State Library and/or Gale-Cengage. Findings from Task 2 will be provided in the Final Report due June 12, 2011.

Task 3: Pilot Test and Make Recommendations to Refine/Improve the Database

The Institute will conduct a pilot test of the database’s usability and functionality using established guidelines. Members of the Florida DLIS and Gale also will be invited to test the database and provide feedback. Key activities and a tentative timeline for Task 3 are delineated in Table 3.

Table 3. Key Activities and Time for Task 3

ACTIVITY	TIMELINE
1. Develop guidelines for usability test and standards that the database should meet: <ul style="list-style-type: none"> • Ensure the database system successfully performs user queries and delivers relevant results: <ul style="list-style-type: none"> ○ Function to display relevant query results to the user, ○ Display query results in an organized structure depending on the nature of the query (such as map, ordered table, or diagram), and ○ Allow user to store queried data in a system of their choosing (give export options such as Excel, Word, and PDF); • System error messages should provide contact information for users to report error to database author/administrator; • System should issue explanation to the user when it produces unexpected results due to the nature of the query (information in addition to specified parameters: –. <ul style="list-style-type: none"> ○ Additional info may not have certain parameters defined, therefore they will be included in query results even if information is not as relevant or completely irrelevant), and ○ System should have error messages in place to help direct users to refine queries (e.g., too many results, too general results, no results); and • Database system should be available only to a select audience, not the general public, so a web portal should be built for authorized users to log into the system. 	March 1 – 15, 2011

Table 3. Key Activities and Time for Task 3

ACTIVITY	TIMELINE
2. Conduct usability tests: <ul style="list-style-type: none"> • Testers will include the Florida DLIS staff, select stakeholders, and Institute staff, and • Evaluate test findings. 	March 16 – 31, 2011
3. Provide feedback from test to the Florida DLIS and Gale-Cengage to improve and refine the database.	April 1, 2011
4. Deliver Final Report of project activities.	June 12, 2011

Note that the timeline for Task 3 may change depending on the expediency of database creation (i.e., Activity 2 usability tests cannot occur until a beta version of the database is made available to the Information Institute). Preliminary findings from Task 3 will be provided to the Florida DLIS and Gale-Cengage by April 1, 2011 in order to facilitate development of the database by the Florida DLIS and/or Gale-Cengage. Findings from Task 3 will be provided in the Final Report due June 12, 2011.

Task 4: Recommendations for Marketing

To support the Florida DLIS and Gale-Cengage future marketing efforts, the study team will use the database to make recommendations that are more targeted, such as the county level. Key activities and a tentative timeline for Task 4 are delineated in Table 4.

Table 4. Key Activities and Timeline for Task 4

ACTIVITY	TIMELINE
1. Develop list of specific marketing research questions to be answered to make recommendations.	March 1 – 31, 2011
2. Run data queries to answer research questions for marketing recommendations: <ul style="list-style-type: none"> • Identify countries, regions, or other areas of low usage that can be targeted for marketing efforts; • Identify regions with high usage for comparison and investigation; and • Analyze data by stakeholder group. 	April 1 – 30, 2011
3. Develop marketing and outreach recommendations.	May 1 – 31, 2011
4. Deliver Final Report of project activities.	June 12, 2011

Findings from Task 4 will be provided in the Final Report due June 12, 2011.

Task 5: Produce Draft Final Report

The Institute will develop a draft final report that describes project activities, summarizes findings, identifies key issues, and makes specific recommendations for Gale-Cengage future marketing efforts. In addition the institute will provide recommendations on how to best maintain and update the database, including where data can be pulled from, what data sets to update, and how often the data should be updated. Key Institute staff will provide input for the report. Key activities and a tentative time line for Task 5 are delineated in Table 5.

Table 5. Key Activities and Timeline for Task 5

ACTIVITY	TIMELINE
1. Develop Draft Final Report – <ul style="list-style-type: none">• Describe project activities;• Summarize findings and identify key issues; and• Make specific recommendations for future marketing efforts.• Provide recommendations on how to maintain and update database.	May 15, 2011 – June 12, 2011
2. Draft Report Reviewed by the Florida DLIS Liaison.	June 1, 2010
3. Deliver Final Report to the Florida DLIS and Gale-Cengage.	June 12, 2011

This task will result in a Draft Final Report detailing project activities and findings. This report will be provided to the Florida DLIS and Gale-Cengage on June 12, 2011.

APPENDIX B: LIST OF PROPOSED DATABASE VARIABLES

Introduction

In this document, the Information Institute provides a list of variables or data sets that potentially can be used for the construction of the demographic marketing database being created for the Florida Division of Library and Information Services (DLIS). The Information Institute is recommending that Florida DLIS use these data sets as the base of a database that will then run queries. The database's goal is to allow information professionals to gain a better understanding of the Florida public library users and learn how to tailor marketing efforts to their needs.

This list was prepared for the approval of the Florida DLIS. This list is divided into 5 categories: Florida Demographics; Florida DLIS Annual Statistical Report; ForeSee Results; FEL Google Analytics Reports; and Gale Monthly Usage Reports. Based on these data sets Information Institute staff and Florida DLIS liaison Mark Flynn will hold a discussion to decide which queries and outcomes are expected from the database using these data sets. This document is the template required for Task 1 in the Florida DLIS Gale-Cengage Outreach Evaluation Tasking First Interim Report.

Florida Demographics

The Information Institute proposes including demographic data for Florida in total. The Information Institute proposes the inclusion in the database of the following demographic data available from the U.S. Census:

1. Population Demographics:
 - a. Male/Female,
 - b. Ethnicity (White, Hispanic, Black/African-American, Asian, Pacific Islander), and
 - c. Age (Under 15, 15-19, 20-34, 35-54, 55-64, 65+);
2. Educational Attainment:
 - a. Less than 9th grade,
 - b. 9th-12th grade, no diploma,
 - c. High school graduate,
 - d. Some college, no degree,
 - e. Associates degree,
 - f. Bachelors degree, and
 - g. Graduate or professional degree;
3. School enrollment:
 - a. Nursery school and Preschool,
 - b. Kindergarten,
 - c. Elementary (1-8),
 - d. High School (9-12), and
 - e. College or graduate school;

4. Language spoken:
 - a. Spanish/Spanish with less than “very well” English,
 - b. Indo European/ Indo European with less than “very well” English, and
 - c. Asian/ Asian with less than “very well” English; and
5. Employment:
 - a. Employed,
 - b. Unemployed, and
 - c. Percent below poverty.

Florida Division of Library and Information Services Annual Statistical Report

In addition to including demographic data available from the U.S. Census in the database, the Information Institute recommends including some data from the Florida DLIS Annual Statistical Report of public libraries. The Information Institute recommends the inclusion of the following variables from this data set:

1. Population data:
 - a. State total population estimate (field code: POPU_ST);
2. Service outlet information:
 - a. Number of central libraries (field code: CENTLIB), and
 - b. Number of branch libraries (field code: BRANLIB);
3. Library Hours of Operation:
 - a. Service hours per typical week; and
 - b. Total annual public service hours;
4. Patrons
 - a. Registered borrowers-resident, and
 - b. Registered borrowers-nonresident;
5. Digital library resource information:
 - a. Local licensed databases (field code: DB_LOC),
 - b. State licensed databases (field code: DB_ST),
 - c. Library Cooperative licensed databases, and
 - d. Total licensed databases (field code: DATABASE);
6. Programs:
 - a. Number of adult programs,
 - b. Number of young adult programs,
 - c. Number of children programs,
 - d. Attendance of adult programs,
 - e. Attendance of young adult programs, and
 - f. Attendance of children programs; and
7. Computers:
 - a. Number of Internet Computers for General Public,
 - b. Number of users receiving technology instruction,
 - c. Number of hours spent on technology instruction for the public,
 - d. Number of staff receiving technology instruction,

- e. Annual number of virtual visits to networked library resources, and
- f. Annual number of users of public Internet computers.

ForeSee Survey Data

Gale-Cengage collects customer satisfaction data from users of Gale databases within the Florida Electronic Library (FEL) through the ForeSee Survey. This data is crucial to making marketing recommendations for the FEL. Therefore, the Information Institute recommends including ForeSee Survey data in the database. Note that ForeSee Survey data is available at the state level *only*. Data points from the ForeSee Survey that the Information Institute recommends including in the database follow⁵:

1. Number of survey respondents by month;
2. Likelihood to return to Gale by month average;
3. Satisfaction rating by month average;
4. Site performance rating by month average;
5. Profession of respondent by month (choices are: University/College student, High school Student, Middle school student, Elementary school student, Librarian, Teacher, Professor, and Other);
6. Purpose of research by month (choices are: School assignment, Professional project, Personal interest, Browsing, and Other); and
7. Search from school or library by month.

Gale Monthly Usage Reports

In addition to the aforementioned datasets (i.e., Florida demographic e-data from the U.S. census, library data from the Florida DLIS Annual Report, and customer satisfaction data from the ForeSee survey), the Information Institute strongly recommends including in the database monthly usage data from the FEL and Gale databases within the FEL. The Information Institute recommends including the following data points:

1. Individual database level data:
 - a. Number of retrievals by database by month,
 - b. Number of searches conducted in a database by month,
 - c. Number of sessions with database by month, and
 - d. Session periods by month, day of the week, and time block;
2. FEL/Gale level data:
 - a. Number of “inside usage” and “remote usage” sessions,⁶
 - b. Total connect time by month for inside and remote usage,⁷

⁵ Other possible variables may be determined upon the ability to acquire raw data of the survey

⁶ This variable may or may not be meaningful to the State Library; this will be considered in consultation with Mark Flynn.

⁷ This variable may be useful only in total and not by inside or remote access; this will be considered in consultation with Mark Flynn.

- c. Total searches by month,
- d. Total retrievals by month, and
- e. Total full text retrievals by month;
3. Individual journal level data:
 - a. Number of retrievals by month, and
 - b. Number of full text retrievals by month; and
4. Individual e-book level data:
 - a. Number of retrievals by month, and
 - b. Number of full text retrievals by month.

Google Analytics

The Information Institute understands that Google Analytics are not available for individual databases within the FEL; Gale has this data at the national level. Google Analytics data are available for the FEL portal website, however only on the state level:

<http://www.flelibrary.org>. The Information Institute recommends including the following variables:

1. Number of hits/visits by month;
2. Number of unique IP addresses by month;
3. Total time on the site per visit by month;
4. Number of pages viewed by month;
5. Number of pages per visit;
6. Bounce rate;
7. Visitors;
8. Visitors by operating system (OS);
9. Visitors by browser;
10. Traffic report;
11. Visits by connection speed;
12. Language used by visitors; and
13. Keywords used to reach FEL site.