Introduction to electronic resources management workshop

Participants Handbook

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INASP workshop outline: Introduction to electronic resources management

This is a 3-day workshop covering:

- Resources available
- Accessing and downloading content
- Search skills
- Evaluation of resources and results
- Managing access and purchase – supply models
- Managing user access (including identifying and overcoming barriers to access)
- Search and discovery systems
- Copyright and licensing
- Monitoring and evaluation of use
- Engaging users - Marketing
- Training others in the use of electronic resources

Aims

The purpose of the workshop is to develop skills in managing e-resources, and training others in their use.

Goals:

- to introduce participants to a range of electronic resources
- to demonstrate the range of e-resources available in their country
- to provide hands-on experience on using and accessing e-resources
- to introduce / review management and implementation activities associated with e-resources
- to examine copyright and licensing implications for e-resources
- to develop ideas, strategies and policies for e-resources management
- to develop skills in training others in the use of e-resources

By the end of the workshop, participants will have:

- reviewed the electronic resources available in their country
- identified core skills for e-resource use, e.g. effective searching and evaluation of search results
- identified the skills, knowledge and attitudes required to support effective e-resource provision
- identified the content and processes required to train others to use e-resources

Workshop expectations and follow up

Expectations

All participants will complete the pre workshop assessment https://www.surveymonkey.com/s/Pre-IntroERM before attending the workshop and the post workshop assessment https://www.surveymonkey.com/s/Post-IntroERM within 5 days of the completion of the workshop. Those completing these assessments will be sent a report discussing the possible answers to the questions about the workshop content within a month of the end of the workshop.

Follow on activities

Good training and capacity building practice shows that training and professional development doesn't just occur within the 3-4 days of the workshop. Follow on is essential to ensure participants are able to put skills, knowledge and ideas into practice and so that 'skills learnt' become results achieved and training makes a tangible, and timely contribution to improved services to users, institutions and the consortium. Institutional managers should therefore make a commitment to support the nominated participant in putting their learning from the workshop into action.

In the final session, participants, in discussion with the facilitator will agree a practical activity, which will be developed into an action plan which can be shared (with other participants, facilitator and consortium) within 6 months of the end of the workshop. This should be something useful, practical and achievable.

Examples of this could be:

- A printed or online "how to" handout/guide on search skills for a specific user group;
- The outline of electronic resource usage training activities planned and implemented in the institution
- Some examples of new ways you have marketed resources as a result – copies of leaflets, photos of marketing materials, copies of marketing blog posts
- Or another appropriate, equivalent task which meets the needs of the consortium and the member institutions.

A table will be provided into which the action plan can be entered. The participant and the facilitator will each keep a copy of this, which the participant will update and send to the workshop administrator within 6 months of the workshop.

Participants are responsible for undertaking follow up tasks and providing details of progress to the consortium, in recognition that the consortium provided a place on the workshop for them / their institution, and sharing progress reports as determined in the workshop.

The facilitator will provide group feedback to the participants, based on their 6 month update of the action plan. The facilitator will also report to the consortium and INASP on these activities and action plans, thus sharing his/her expertise beyond the boundary of the workshop sessions.

Selection

INASP takes the issue of participant selection very seriously and firmly believes that selecting the right people to attend training is one of the most important contributors to training being successful and having maximum impact. There are many factors that feed into an individual being right for a particular training course and it is important to establish the characteristics of the ideal participant in advance of any selection process. INASP advocates using a competitive selection process and ensuring that participants have the support of their institutional managers, both in attending the workshop and in putting into practice what they have learned during the workshop.

Please note that in some workshops there is a requirement to use a competitive selection process. Participants need to undertake to complete the pre- and post-workshop assessments.

From organisational experience INASP recommends a maximum **of 20 participants per workshop**. Smaller group sizes enable greater participation and more student-centred learning.

Participants

The workshop is primarily for librarians from institutions which are members of the national consortium. Participants will be library staff who are already working with e-resources, or, in the case of libraries new to e-resources, are the designated e-resources librarian. Participants will be responsible for overseeing or delivering training on electronic resources to library users.

Context

The workshop is part of a suite of workshops provided by INASP for partner organisations. More information about INASP can be found at http://www.inasp.info/.

Participants from the Introduction to electronic resources management workshop will be expected to lead on the training of researchers and library users in accessing and searching electronic resources.

Structure

Pre-workshop assessment

Day 1 Using electronic resources

- Introduction to e-resources – what and why
- INASP materials in [country]
- Other resources – access initiatives, OA, consortium
- Search skills
- Evaluation of resources

Day 2 Management of electronic resources

- Access models and registration
- Subscriptions options
- Access troubleshooting
- Monitoring and evaluation of usage
- Marketing and promotion

Day 3 Training others to use electronic resources

- Who should know how to search e-resources?
- What do they need to know?
- What methods can you use?
- Planning training activities
- Training techniques
- Agreeing next steps with the consortium
- Workshop evaluation and post workshop assessment

Post-workshop

- Post-workshop assessment
- Report back on progress of implementation of action plan within 6 months, including sending revised plans to the administrator for forwarding to the facilitator who will provide group feedback to the participants, consortium and INASP.
- Maintain contact with workshop colleagues via discussion or mailing list

Timing

Care should be taken to allow enough lead time for the workshop. Institutions should be contacted and asked to nominate delegates at least 1 month before the workshop date. This invitation should outline the objectives and format of the workshop and given information about preparatory work. The workshop administrator will need to contact participants 2 weeks before the workshop to check they will be able to complete the pre-workshop assessment.

When selecting the date of the workshop, please consider:

- is there at least one month lead time?
- is the time likely to be convenient for participants, given their other commitments (eg is this a busy time in the academic year)?

- public holidays
- public events
- religious or political events
- other professional meetings (local, national, and international)
- other activities at the same time in the same venue
- climate / travel conditions

Please allow enough time before the workshop for everyone to prepare and enough time afterwards to implement what has been learned at the workshop.

There is no point holding a workshop if it clashes with or is too close to other events. There must be time for preparation and implementation.

Language

The workshop and all associated materials are in English.

Evaluation

Workshop	Standard INASP evaluation procedure, using forms with ratings and open questions for comments and feedback from each participant; facilitator's report: administrator's report
Outcomes	Feedback from participants on their follow on institutional training activities

Role of the Consortium / Country Coordinator

The Consortium or Country Coordinator, as appropriate, should be involved in the recruitment of appropriately experienced participants, in the selection of facilitator and assistant facilitator, in the delivery and focus of the workshop, and in the co-ordination of post-workshop activity.

S/he may like to participate in the workshop, presenting an overview of access to electronic resources in the host country during the first session and showing how the workshop fits into the overall development and strategy of electronic resource provision.

After the workshop, participants will be expected to report back within 6 months on follow-on activity in their institutions to the Coordinator and/or national consortium which would show that they have been able to offer training in the use of e-resources within or outside their institution.

Contacts

At INASP the following people are involved with the workshop:

Materials development: Anne Powell apowell@inasp.info

Pre workshop exercise in preparation for

Day 3 Training others to use electronic resources

Unit 3.2: Training for e-resource use

Exercise 3.2.1. Part A Individual reflection on successful training

Work: Individually

Time: 45 minutes before workshop, 5 minutes review in workshop

Consider a training event you either delivered or attended which felt successful:

- What was the goal of the training activity?
- Who were the participants?
- What activities were undertaken (for example: presentations, demonstrations, exercises, discussions)
- What do you feel worked?
- What do you feel did not work?
- What were the main achievements?

Introduction to electronic resources management

Workshop introduction and overview

Workshop objectives

- to introduce participants to a range of electronic resources
- to demonstrate the range of e-resources available in your country
- to provide hands-on experience on using and accessing e-resources
- to introduce / review management and implementation activities associated with e-resources
- to examine copyright and licensing implications for e-resources
- to develop ideas, strategies and policies for e-resources management
- to develop skills in training others in the use of e-resources

Workshop expectations

- Follow-on training to share learning with colleagues should be held at each institution represented within 6 months of the workshop.

Welcome and introductions

- Workshop facilitator
- Hosts
- Participants
- Housekeeping
- House rules

Content outline

- Review the range and scope of e-resources
- Identify skills, knowledge and attitudes required to support effective e-resource use
  - Identify the core competencies for e-resource use
  - Review the importance of effective searching
  - Identify the key target users of the e-resources in participant's organisations
- Review e-resource access, use and training case studies

Content details

- Overview – what is available
- Searching
- Evaluation and quality
- Downloading and document delivery
- Supply models
- Storage, archiving, copyright and licensing
- Managing access and use
- Training others to use e-resources

Expected outcomes - access

- After the course all workshop participants will:
  - have been introduced to a range of e-resources and scholarly databases available online
  - have hands-on experience of using full range of e-resources / scholarly databases available

Expected outcomes - use

- After the course all workshop participants will have examined:
  - tools, tips and techniques to effectively and efficiently use e-resources
  - legal implications for e-resource use
  - issues surrounding e-resource management in libraries

Expected outcomes - training

- After the course all workshop participants will:
  - Understand the importance of training users to use resources effectively
  - Basic techniques…

Workshop format

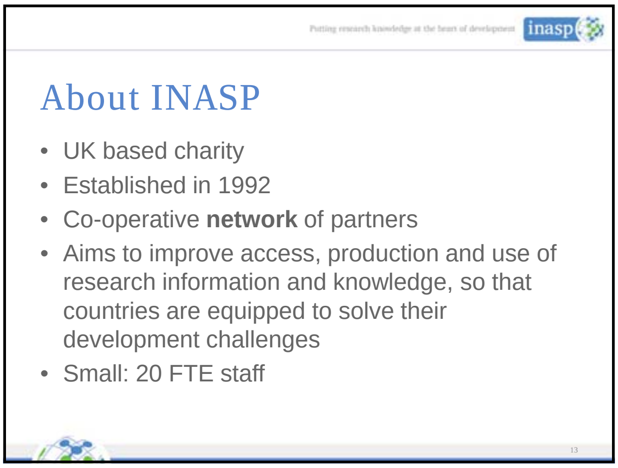
- Informal - questions please!
- Hands on - instruction, practise and support
- Adaptable – we can add or remove things as go along, so please say
- Sharing of information and experiences with and between workshop participants

Workshop partners and thanks

- Host institution – venue, catering
- Participant's institutions – time, transport

International Network for the Availability of Scientific Publications

www.inasp.info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About INASP
• UK based charity
• Established in 1992
• Co-operative network of partners
• Aims to improve access, production and use of research information and knowledge, so that countries are equipped to solve their development challenges
• Small: 20 FTE staff
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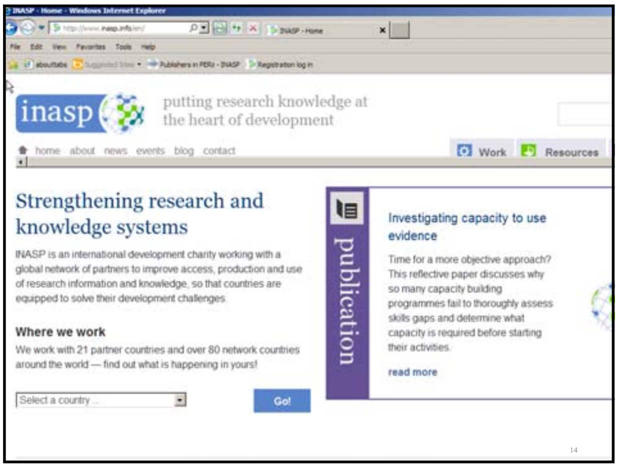
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Work
Resources
Strengthening research and knowledge systems
INASP is an international development charity working with a global network of partners to improve access, production and use of research information and knowledge, so that countries are equipped to solve their development challenges.
Where we work
We work with 21 partner countries and over 80 network countries around the world — find out what is happening in yours!
Select a country ...
Go!
publication
Investigating capacity to use evidence
Time for a more objective approach? This reflective paper discusses why so many capacity building programmes fail to thoroughly assess skills gaps and determine what capacity is required before starting their activities.
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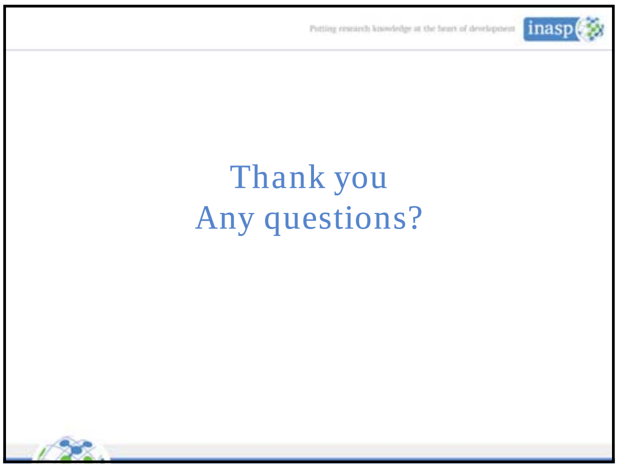
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inasp
Thank you
Any questions?

Introduction to electronic resources management

Day One : Using electronic resources

Introduction to electronic resources management

Unit 1.1: Introduction to e-resources

Definitions

Your ideas?

Any examples?

Definitions

An Electronic Resource is any information source that can only be accessed using a computer

- May be electronic version of print
- May be electronic version only

Scope

- E-journals
- E-books
- Databases
- Reference material
- Digital collections
- Other related materials

Why use e-resources?

Exercise 1.1.1 - Small group discussion

- List as many benefits as possible of e-resources
- What disadvantages can you identify?

Benefits

- Current (very current contents)
- Easy and efficient retrieval process
- Sharing of resources (can be accessed by many at the same time)
- Easy to access related items
- Easy to browse

More benefits

- Saves time for both user and staff
- No cataloguing (MARC records are part of the package)
- Economic (subscribe or purchase in packages)
- Enhanced security (no loses, no mutilation...)

Still more benefits

- Easy to monitor and evaluate usage (publishers provide usage statistics)
- Access to publishers' added benefits (training, advanced search tools, friendly platforms, alerts, etc.)
- Fun

Most important benefit

Enhances Research Activities

the benefits listed above enhance access to quality content which leads to more and better research output

Thank you
Any questions?

Day 1 Using electronic resources

Unit 1.1: Introduction to e-Resources

Exercise 1.1.1 Benefits of using e-resources

Work in: Groups of 4-5

Time: 10 minutes

Please be prepared to report back to the plenary session after discussion

Instructions

List as many benefits as possible of e-resources

What disadvantages can you identify?

Introduction to electronic resources management

Unit 1.2: Electronic Resources in [country]

Outline

- Routes to e-resources
  - INASP
  - Other access initiatives
  - Open access
  - Direct subscriptions
- Support for e-resource access and use
  - Publishers' promotional materials
  - Usage statistics
  - Publisher help desks

INASP

- Country resource pages on INASP website
- Links to
  - Publishers' promotional materials
  - How to collect usage statistics
  - How to contact a publisher
- Open access resources

INASP country resource pages

- http://www.inasp.info/
- Select your country
- See a list of all resources available to your country
- Url for access to resource
- Description of content and service features

Country page

- http://www.inasp.info/[name of country]
- Url for access
- Description of content and service features
- Registration information
- Administration information
- Publisher's contacts: email addresses

Open Access resources

- http://www.inasp.info/en/training-resources/open-access-resources/
- Multi-disciplinary resources
- Subject specific resources
- Open access readings

Other access initiatives

- Research 4 Life
  - Hinari
  - Agora
  - Oare
  - Ardi
- Oxford Journals

Practical exercise 1.2.1

- Use www.inasp.info
- Collect information on the exercise sheet
- Be prepared to report back
- Time allowed: 30 minutes

Thank you
Any questions?

Day 1 Using electronic resources

Unit 1.2: Electronic Resources

Exercise 1.2.1 Exploration and review of e-resources

Work in: Pairs

Time: 30 minutes

Please be prepared to report back to the plenary session after discussion

Summary

In this exercise participants map out the content and subject focus for the e-resources available in their country.

Objectives

On completion of this session participants will be able to map out the e-resources available to their country by content and subject

Instructions

Work in pairs to look at the resources which have been allocated to you. Refer to your country page on www.inasp.info and work through the Exercise sheet below. Be prepared to report back and hand in your sheets for display.

Exercise Sheet

Collected information for resource 1

Name of e-resource

Subject coverage (what subject areas are available, and if possible, how does the size of the resource break down by subject)

Size of the resource:

- Number of titles ___________
- Number of articles ___________

Date range of the resource available ___________

Does the publisher offer any support (promotional items, usage statistics, training)? If so, what is available?

Collected information for resource 2

Name of e-resource

Subject coverage (what subject areas are available, and if possible, how does the size of the resource break down by subject)

Size of the resource:

- Number of titles ___________
- Number of articles ___________

Date range of the resource available ___________

Does the publisher offer any support (promotional items, usage statistics, training)? If so, what is available?

Collected information for resource 3

Name of e-resource

Subject coverage (what subject areas are available, and if possible, how does the size of the resource break down by subject)

Size of the resource:

- Number of titles ___________
- Number of articles ___________

Date range of the resource available ___________

Does the publisher offer any support (promotional items, usage statistics, training)? If so, what is available?

Introduction to electronic resources management

Unit 1.3: Effective searching of e-resources

OUTLINE

- Introduction
- Search preparation
- Searching
- Refining a search
- Boolean operators
- Truncation
- Evaluating a search

Introduction

- The volume of electronic information is overwhelming
- It is not easy to identify and access relevant information
- Search skills can assist in retrieving relevant information and saving time
- Librarians hold the key to such competencies
- They need to understand effective search strategies

Preparing a search strategy

- Effective searching is a process
- Define a search topic
- Identify possible search terms
- Refine a search strategy

Defining a Search Topic

- Your search topic

Sexual violence in armed conflicts

- What do you know about the topic?
- Define the scope
  - Regional coverage (continent, region, country, etc.)

  e.g. in Africa, in Kenya, in Western Kenya…

Identifying Search Terms

- What are the possible terms you can use for searching?

Examples

- **Sexual violence**
  - Sexual harassment, sexual crime, sexual assault, sexual abuse, rape

- **Armed conflicts**
  - Regional conflicts, war, armed forces, women in armed conflicts,

Identifying Search Terms

Issues to consider

- Synonyms (mobile phones, cellular phones)
- Plural/singular forms (woman, women…)
- Spelling variations (honour, honor…)
- Variations of root word (feminism, feminist, feminine….)
- Acronyms (CEO, Chief Executive Office…)
- Lower/upper case

Where to start the search

- Library website
- INASP country page
- Publisher platform
- Google or other search engine
- Other logical starting point

Searching

- Any of the identified terms and related terms can be used in the search separately
- The end results will be overwhelming making selection fairly time consuming
- To enhance accuracy and save on time, one has to refine the search by combining search terms

Predicting results

- How many documents would you like to retrieve?
- A few very specific ones?
- Lots of general ones?

Refining a Search

- Using the identified search terms separately is a broad search which may result in overwhelming results
- To refine the search one has to narrow the search
- Boolean Operators assist a researcher to combine two or more search terms to enhance accuracy

Boolean Operators

- Boolean Operators consists of 3 words
  - AND
  - OR
  - NOT
- These words can be used to combine search terms to narrow or broaden the search

Boolean Operators

- AND: retrieves a document on condition that both search terms used are present
  e.g. Sexual violence AND armed conflicts
- OR: retrieves documents with either of the search terms used
  e.g. sexual violence OR armed conflicts
- NOT: Excludes documents with one of the search terms from the results
  Sexual violence NOT rape

Truncation

- Truncation is another strategy for broadening a search
- It helps to retrieve related terms in one search
- It also solves the problem of singular and plural
- But truncation is used with a code e.g. $ or * This depends on the search engine used

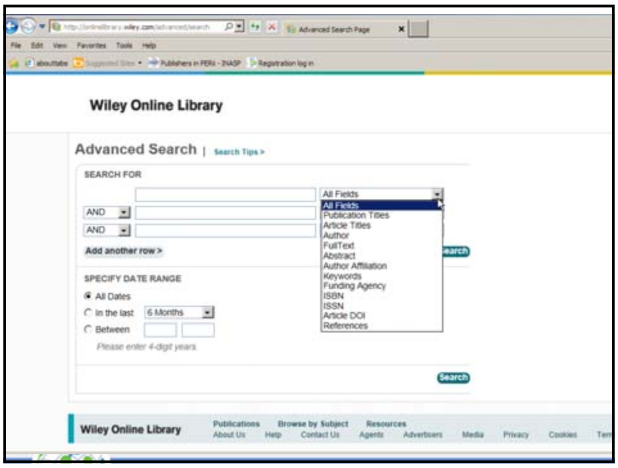
Truncation

EXAMPLES

- Search Topic is Economics and development
- Economic development will certainly be useful to this topic
- Econ*. Will retrieve documents with both terms

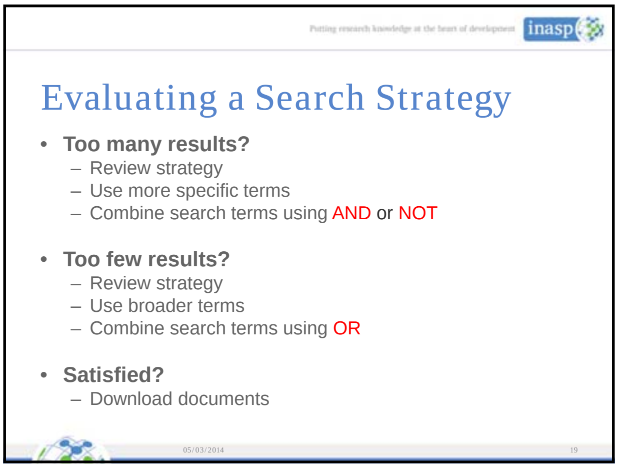
Field searching

- Most publisher resources offer advanced search functions
- Author
- Journal title
- Article title
- Date ranges
- Abstract



Search modifications

- Learner-centred – alternative spellings?
- Pedagogical – where should we truncate?
- Education – what will it produce?
- Train the trainer – any irrelevant items? How would you use this?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Evaluating a Search Strategy
• Too many results?
– Review strategy
– Use more specific terms
– Combine search terms using AND or NOT
• Too few results?
– Review strategy
– Use broader terms
– Combine search terms using OR
• Satisfied?
– Download documents
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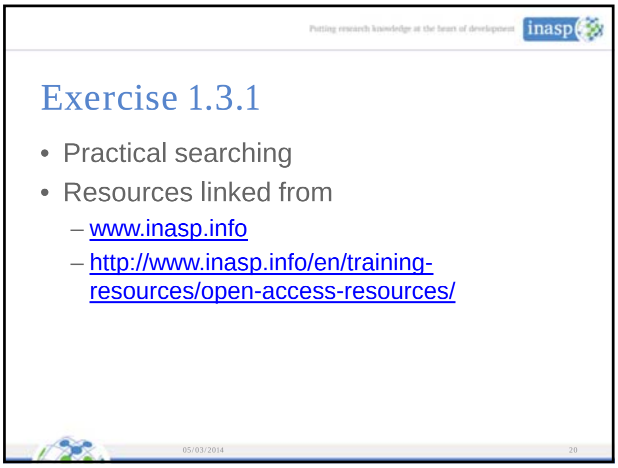
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Exercise 1.3.1
• Practical searching
• Resources linked from
– www.inasp.info
– http://www.inasp.info/en/training-resources/open-access-resources/
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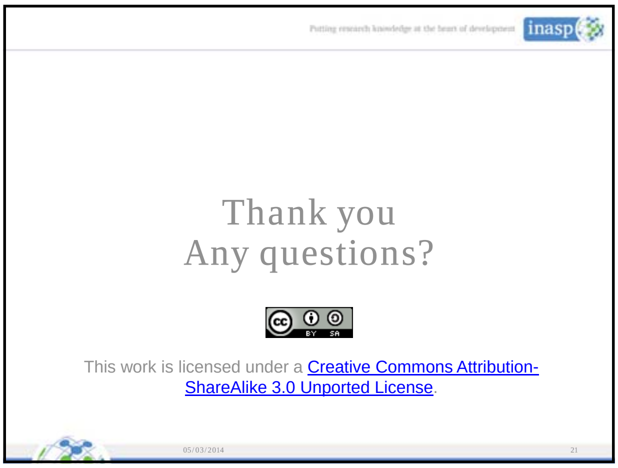
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Day 1 Using electronic resources

Unit 1.3: Effective searching of e-resources

Exercise 1.3.1 Searching electronic information resources; techniques and strategies

Work in: Pairs

Time: 75 minutes plus 15 minutes discussion at end

Please be prepared to report back to the plenary session after discussion. This report back will be about what you learned about the search process, not the search results.

Introduction

Exercise explained

Individuals or pairs of workshop participants will undertake hands-on work using the computer lab to practice designing and implementing effective search strategies and techniques on a range of electronic information resources and search engines

Users should record their experiences and findings as below. They will be provided with 4 sheets each, so should be encouraged to search up to 4 resources as time allows. As an interesting exercise, they could compare running a search directly in a publisher resource with running that search through Google.

Hands-on duration: 90 minutes
Report back and discussion: 30 minutes

Objective

To practice devising and implementing an effective search strategy and incorporating complex search techniques (where appropriate) such as Boolean operators, phrase searching, stop words, quotation marks, punctuation, wildcard/truncation symbols, restricted field searching, proximity searching, etc. in a range of e-resources available.

Instructions

This exercise is divided up into 5 stages, the first of these should begin on paper, the others are computer based. It is important to not rush straight to the computer and the first "search" box available – that is not effective searching.

The five stages of this exercise and the five stages of effective searching:

1. Define your information need

2. Decide which resource/s to use (both e-resources and search engines)

3. Find out what search options your chosen resource offers

4. Run your search
5. Review and refine your search.

Handouts

In your pack are some handouts on search skills, which are included for reference and can be read and referred to after the workshop

Stage 1: Define your information need

Record your search topic and outline strategy on the worksheet provided.

It is important to select a topic that you have an understanding of and ideally, a genuine interest in. Perhaps you can select a topic that you are personally interested in or one that many of your users or colleagues might be interested in.

Completing this stage on paper is important, as even extremely experienced searchers can benefit from completing this stage away from the computer.

Stage 2: Decide which e-resources to use

Refer to the resource descriptions sheets produced in the previous exercise or the pages relevant to your country at www.inasp.info . You will need to consider which of the e-resources available are most likely to contain content that will be relevant to your topic and searches.

You may also want to do some searching using a general Internet search tool, such as Google. That can be a useful approach to get additional leads, keywords and such that may be of use when searching the library focused e-resources. However, focus mainly on the e-resources, Google should just be used as an aid to this exercise and not be the main focus.

Stage 3: Find out how the e-resource functions

How does the e-resource you are going to use function? Does it offer advanced search functions? Are you familiar with using it? If not then you may wish to explore the resource before you start searching it e.g. test how it functions and what the results are of your search phrases and topics. Record your results and experiences of conducting the searches using the table provided.

If there are any additional results, features or comments you think would be useful to share with others, please make a note of them too.

Stage 4 and 5: Run your search and Review and refine your search

Using the information recorded and obtained from stages 1-3, undertake your searches using a variety of e-resources. Review and refine your search in light of the results you get as you go along. Record your experiences and findings in the table below. Be prepared to present a summary of your experiences to others in the workshop during the closing session of this exercise.

Record the results of your search

Record the results of your searches and search topic for each of the e-resources that you have explored in detail. Be prepared to share some of your experiences with other workshop participants during the final session of this exercise.

E-resource 1

Name of e-resource :	
What topic were you looking for?	
What terms did you use to describe your topics?	
What kind of results did you find? Too many results? Too few results?	
Did these results differ for this resource from others that you tried? How?	
Was your searching a success? Was this due to how you searched? Or what you searched?	
Did you try to modify your search? If so, how? Was this successful?	
Try running the same search in Google. How many results did you get? How useful are the results? How credible do they seem?	

E-resource 2

Name of e-resource :	
What topic were you looking for?	
What terms did you use to describe your topics?	
What kind of results did you find? Too many results? Too few results?	
Did these results differ for this resource from others that you tried? How?	
Was your searching a success? Was this due to how you searched? Or what you searched?	
Did you try to modify your search? If so, how? Was this successful?	
Try running the same search in Google. How many results did you get? How useful are the results? How credible do they seem?	

E-resource 3

Name of e-resource :	
What topic were you looking for?	
What terms did you use to describe your topics?	
What kind of results did you find? Too many results? Too few results?	
Did these results differ for this resource from others that you tried? How?	
Was your searching a success? Was this due to how you searched? Or what you searched?	
Did you try to modify your search? If so, how? Was this successful?	
Try running the same search in Google. How many results did you get? How useful are the results? How credible do they seem?	

E-resource 4

Name of e-resource :	
What topic were you looking for?	
What terms did you use to describe your topics?	
What kind of results did you find? Too many results? Too few results?	
Did these results differ for this resource from others that you tried? How?	
Was your searching a success? Was this due to how you searched? Or what you searched?	
Did you try to modify your search? If so, how? Was this successful?	
Try running the same search in Google. How many results did you get? How useful are the results? How credible do they seem?	

Day 1 Using electronic resources

Unit 1.3: Effective searching of e-resources

Handout 1.3.2 Search skills further reading

How to search on Google

https://support.google.com/websearch/answer/134479?hl=en

Google's own page on effective searching.

University of East London Info Skills pages

http://infoskills.uelconnect.org.uk/pages/finding_information/37/uel_info_skills.html

Making the most of Google PDF handout linked from http://infoskills.uelconnect.org.uk/pages/finding_information/37/google_and_search_engines.html

University of California online tutorial

http://www.lib.berkeley.edu/TeachingLib/Guides/Internet/FindInfo.html

Online tutorial for the web searching workshops formerly offered by the University of California Berkeley Library. These documents are based on information and training resources by Joe Barker, His searching tutorials are highly recommended, even though they are now somewhat out of date.

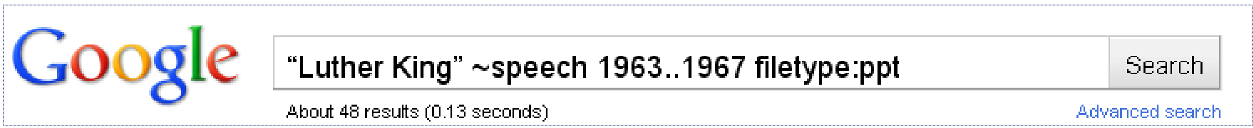
Info skills

Making the most of Google

Introduction

Google is the best known and most popular internet search engine. Perhaps the main reason it is so popular is because it is so easy to use. However, the quality of the results and the relevance of the results to your needs will depend hugely on what you typed in the search box. Knowing how to enter your search in order to get the most relevant results is quite a skill.

For tips on choosing keyword please visit the 'Search strategies' section or the 'Understand assignment title' guide.



Types of search engine

There are many different types of search engine. They all return different results. Some specialise in returning certain types of result. Here are just a few examples:

- **Web search engines -** For general web searching, e.g. Google (www.google.co.uk), Bing (www.bing.co.uk), Yahoo! (www.yahoo.co.uk), Ask Jeeves (www.ask.co.uk).
- **Tabbed search engines -** Display results from several search engines at once, allowing you to flick between the different results. e.g. www.zuula.com, www.search.io.
- **Gateways and portals -** Searchable directories of websites. See the section on 'Subject gateways' for more information. e.g. www.intute.ac.uk, www.dmoz.org, www.vlib.org, directory.google.com.
- **Human web search engines -** Search blogs and discussion boards, e.g. www.boardreader.com, www.blogpulse.com, www.icerocket.com.
- **Web archives -** Search web pages which no longer exist and see websites as they were at certain points in the past, eg www.archive.org.

Beginners tips for improving your search results

Unless you specify otherwise, Google automatically searches for all the words you type in, to appear somewhere in the webpage or document, not necessarily next to each other.

- **Search a phrase** - Use speech marks ("") to search for words as a phrase, e.g. *"Tony Blair" 2005 election.*
- **Search for alternative words** - Add OR to search for alternative words e.g. *university OR college OR "higher education"*.
- **Remove words from a search** - Use a minus (-) symbol before the word to remove them from a search e.g. *Europe -EU* will find anything mentioning Europe which does not refer to the EU.

- **Fill in blanks** - Use an asterisk (*) to replace a whole word or number e.g. *"Top * destinations in Spain"* will return hits including "top 10 destinations in Spain" and "top holiday destinations in Spain".

Advanced Google searching and internet search strings

If you are confident with the basics of Google searching, the next level of search skills is using 'search strings'. These are what advanced Internet searchers use to find exactly what they are looking for. A search string is comprised of a number of search commands which are typed in together.

For a comprehensive guide to Google search commands, see: **www.googleguide.com**. As an introduction, here are some of the main search commands you can use:

Command	Details
site:[website domain]	Limits results to that web domain e.g. *headache site:nhs.uk* will search for the word 'headache' on the NHS webpages, while *"international aid" site:gov.** will search for the phrase 'international aid' appearing on any government website (including gov.uk, gov.au, gov.ru, etc.).
filetype:[file extension]	Limits results to documents with certain file extensions e.g. *filetype:pdf* will return only pdfs, while *filetype:ppt* will return only PowerPoint presentations. Useful file extensions to know include: doc (Word), xls (Excel), ppt (PowerPoint), pdf (Adobe Acrobat), swf (Flash), mp3 and wma (music), mpg and wmv (video).
[number]..[number]	Searches for all numbers in that range. It can be particularly effective for date searching e.g. *"Luther King" 1963..1968* will find anything referring to Martin Luther King between those dates.
related:[web address]	Finds similar pages to the web address you type in e.g. *related:google.com* finds other search engines.
link:[web address]	Returns web pages which link to that web address – often these will be pages on a similar topic.
~[word]	Instructs Google to search for that word and any synonyms e.g. ~university will find any result which includes the word university or similar words such as college.

Tip: Search commands work in reverse if you use a minus symbol. For example, to cut out all results from government websites, you might include *-site:gov.** in your search, or to cut out Word documents from your results you might include: *-filetype:doc*.

Example Search String

For example, here is a search string you might use to find PowerPoint presentations about Martin Luther King's speeches given between 1963 and 1967: ***"Luther King" ~speech 1963..1967 filetype:ppt***.

This example consists of four components:

1) The phrase "Luther King".
2) The thesaurus word 'speech'.
3) The date range 1963 to 1967.
4) The file type 'ppt'.

Day 1 Using electronic resources

Unit 1.3: Effective searching of e-resources

Handout 1.3.4 How to search on Google

https://support.google.com/websearch/answer/134479?hl=en

Tip 1: Keep it simple

No matter what you're looking for, try to start with a simple search. Add a few descriptive words if necessary. If you're looking for a place or product in a specific location, add the town or zip code.

Try it out: [**`where's the closest airport`**]

Tired of typing? If you're using Google Chrome, click the microphone icon in the search box and search by voice.

Tip 2: Use web friendly words

Use words that are most likely to appear on websites. For example, instead of saying [**`my head hurts`**], say [`headache`], because that's the term a medical site would use.

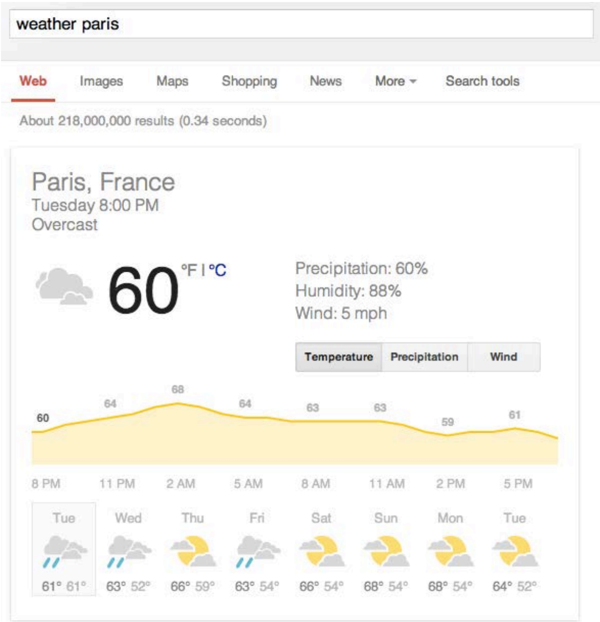
Tip 3: Don't worry about the little things

- **Spelling.** Google's spell checker automatically uses the most common spelling of a given word, whether or not you spell it correctly.
- **Capital letters.** A search for [**`New York Times`**] is the same as a search for [**`new york times`**].
- **Punctuation.** Most punctuation, like ?!,.%^*()[]\, is ignored when you search.

Tip 4: Find quick answers

For many searches, Google will do the work for you and display an answer right on the search results page immediately after you type it. Try some of the searches below either by typing or searching by voice:

Some features, such as information about sports teams, are not available in all regions.



- **Weather.** Search [`weather`] to see the weather in your location or add a city name after weather to find weather in that area.
- **Dictionary.**Put [`define`] in front of any word to see its definition.
- **Calculations.** Enter a math equation like [`3*9123`] to see the answer, along with a calculator to solve more problems, even graphing equations.
- **Unit conversions.** Enter any conversion, like [`3 dollars in euros`].
- **Sports.** Search for the name of your team to see a schedule, game scores and more.
- **Quick facts.** Search for the name of a celebrity, location, movie, or song, and see quick information on the right side of the page.

Tip 5: Become a search expert

Want more tips and tricks to help you search like a pro? Check out the links below to learn more advanced search techniques.

- Advanced Search
- Image search
- Search operators
- Search tools and filters
- Punctuation and symbols in search

Introduction to electronic resources management

Unit 1.4: E-resource evaluation tips

Contents

- What can the url tell you?
- Scan the page
- Quality indicators
- What do others say?
- Does it all add up?

What can the url tell you?

- Is it somebody's personal page?
  - Look for a personal name in the url
  - Is the server a commercial ISP providing web page hosting e.g. blogspot?
- What type of domain is it?
  - .gov; .edu etc
  - Check country code
- Is it a publishing entity that makes sense?

Scan the perimeter of the page

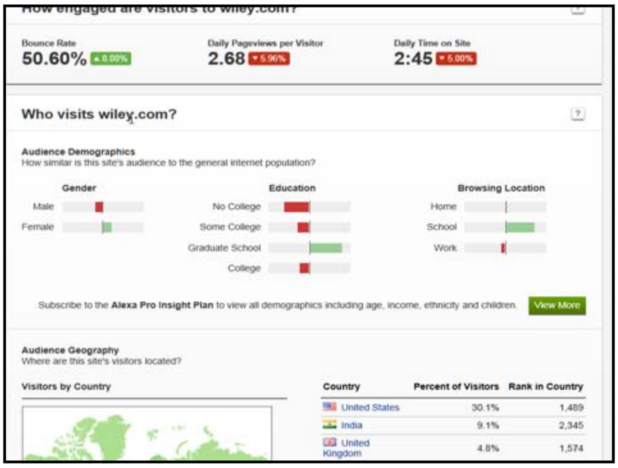
- Who wrote the page?
- Is it dated and sufficiently current?
- What are the author's credentials?

Look for indicators of quality

- Are sources documented with links or footnotes?
- Is reproduced information complete, not altered?
- Is permission acknowledged?
- Are there links to other resources on the topic?
- How recent is the copyright date?

What do others say?

- Paste url into Alexa.com
  - Will give subjective reviews, traffic etc
- Who links to the page?
- Is the page listed in reliable directories?
  - E.g. http://www.ipl.org/
- What do others say about the author?
  - Google the name of the author



What is your own opinion?

- Why was the page put on the web?
- Does it feel trustworthy?
- Is this as good as I would find if I used a library resource?

Exercise 1.4.1

- Resource evaluation from http://www.inasp.info/en/training-resources/open-access-resources/
- Evaluate one resource from this page
- Use the left menu for subject specific resources

Reflections on the day

- What have you learned today?
- What actions will you take when you return to your library?

Thank you
Any questions?

Day 1 Using electronic resources

Unit 1.4: E-resource evaluation

Exercise 1.4.1 Evaluation of free e-resources

Work in: Pairs

Time: 20 minutes

Please be prepared to report back to the plenary session

Instructions

Using your preferred Web browser, visit your choice of the resources listed at http://www.inasp.info/en/training-resources/open-access-resources/ Evaluate one of the resources on this page, then use the left menu to select a subject specific resource.

Attempt to answer as many of the questions below as you can for each resource you examine.

E-resource 1

Name of resource	
Is full text available for some or all of the content?	
What is the most recent content you can find?	
Is there any indication how often content is updated?	
Can you see clearly who published the information?	
Is there any indication that the content is peer reviewed?	
How useful is the online help and guidance? Give details.	
Select a subject area you know something about to search Did you find the information you wanted? Did you find good quality information? What difficulties, if any, did you have?	
How easy to use is the resource – in terms of: **Usability** i.e. how easy it is to navigate around the site **Speed** – how quick is your interaction with the resource **Language** and understanding – apart from content, how clear is the language used within the site	

Would you use this resource again or recommend it to a colleague? Why? Why not?	
How does this resource compare with those you used in the last exercise?	

E-resource 2

Name of resource	
Is full text available for some or all of the content?	
What is the most recent content you can find?	
Is there any indication how often content is updated?	
Can you see clearly who published the information?	
Is there any indication that the content is peer reviewed?	
How useful is the online help and guidance? Give details.	
Select a subject area you know something about to search Did you find the information you wanted? Did you find good quality information? What difficulties, if any, did you have?	
How easy to use is the resource – in terms of: **Usability** i.e. how easy it is to navigate around the site **Speed** – how quick is your interaction with the resource **Language** and understanding – apart from content, how clear is the language used within the site	
Would you use this resource again or recommend it to a colleague? Why? Why not?	
How does this resource compare with those you used in the last exercise?	

Introduction to electronic resources management

Day Two : Management of electronic resources

Introduction to electronic resources management

Unit 2.1: Access models and registration

Recap of Day 1

- Types of resource
- Search process
- Evaluation of results

Categories

Electronic resources can be categorized into:

- Purchases
  - Annual Subscriptions (journals and books)
  - One time purchase (books)
  - Pick and choose (selecting titles one needs)
  - Sometimes “cost” is negotiating free access
- Open Access
  - Peer reviewed scholarly research, availed for unrestricted access

Why E-Resources?

- Benefits
- Requirements

Implementation: Requirements

- ICT Infrastructure
  - Reliable connectivity
  - Adequate bandwidth
  - Adequate computers to facilitate access
  - Reliable technical support
  - Strong collaboration with ICT Department
- Skills development among staff
- Sensitization of users
- Budget (print vs electronic)

Role of the Library

- E-resources is the current global trend in information management
- The Library should ensure they take the lead in this area to remain relevant
- Library professionals have the right training in information retrieval and management and should apply the same skills in e-resources

Role of the Library - skills

- Library staff understand the book industry and are better placed to deal with publishers
- They have better skills to evaluate published quality research output
- They have better skills to assist researchers find what is relevant to their research
- It is the role of the library to sensitize users on effective googling

Role of the Library - awareness

The Library should take up the role of:

- Sensitizing administrators to bring them on Board
- Sensitizing users to maximize on usage
- Advising ICT Departments on the best infrastructure for effective implementation

Role of the Library - finance

- Negotiating with publishers to get good deals (value for money)
- Marketing the e-resources to maximize usage
- Budgeting for e-resources and getting best options for affordable deals

Challenges

- Changing mind sets
- Cost of e-resources
- Negotiating skills (understanding publishers)
- Reliable ICT infrastructure
- Managing e-resources effectively
- Evaluating usage

Access and authentication

- There are two main authentication access control mechanisms:
  - IP address
  - Passwords
- Combination of the above sometimes permitted
- Additionally, pay-per-view is available and growing

IP addresses

Institutions should obtain and use a fixed, external IP address.

- Access by IP is preferred/required by publishers
- Direct recognition of institution by publisher
- Seamless access, no need for password
- Easy administration - all networked PCs on campus can access e-resources
- Greater security (no misuse of usernames)
- A proxy server can be set up to allow for off-campus use.
- Usage statistics are recorded
- Using a router and firewall will safeguard your computer system

Access models

- INASP
- Research 4 Life
- Direct subscriptions
- Open access

Registration process

- Registration is required for most subscription-based resources
- Differs for each access initiative
- Required because
  - License agreements – legal issues
  - Branding
  - Customer services

Legal issues

- Authorised users
  - Employees, faculty, staff and students walk in users
  - Off campus use
- Permitted use
  - Private use or research, no commercial use
- Prohibitions
  - Altering, copying, systematic downloading
- Withdrawal
- Copyright
  - Remains with the publisher

INASP registration – Part 1 Application

- Application
  - Librarian registers for an account at http://www.inasp.info/en/accounts/login/
  - Select sign up as new member
  - Enter personal details and select correct country
  - Librarian receives an automatic email and activates link in email
  - Librarians can then log in, select their institution and associate themselves with their own institution
  - Keep a record of your username and password
  - Several librarians can register for the same institution
    - Shares workload
    - Allows for continuity
  - If the institution is not listed, it can be added. New institutions will need to be approved by their country coordinator. Users will be sent an email once the institution is accepted.

INASP registration – Part 2 Registration

- Registration with resources
  - Librarian returns to http://www.inasp.info/en/accounts/login/
  - Register in turn for each resource
  - Must read and accept the relevant license.
  - Allow 10 working days for access to the resource to be set up


Research4Life Registration
HINARI
Research in Health
3/5/2014
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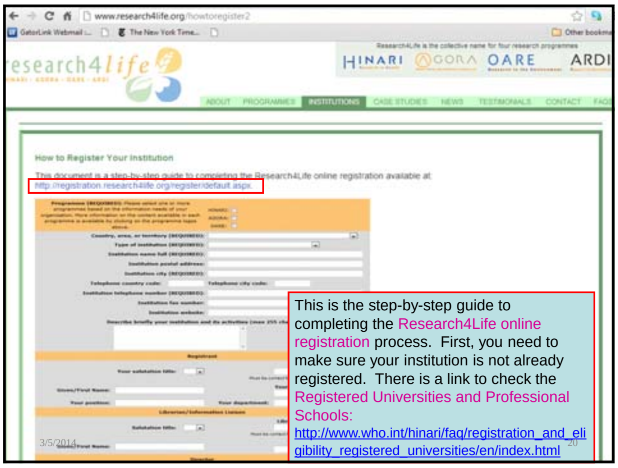
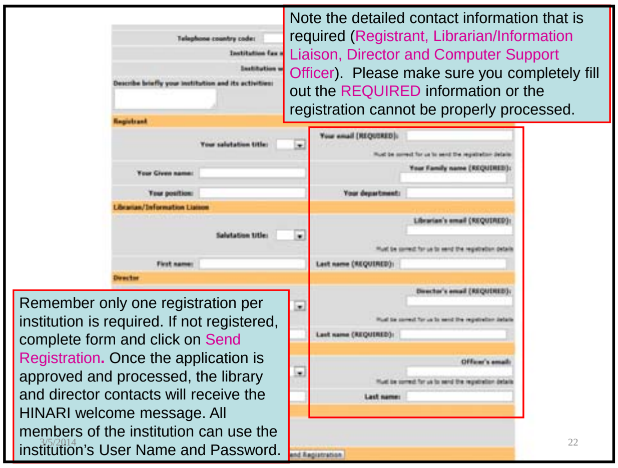
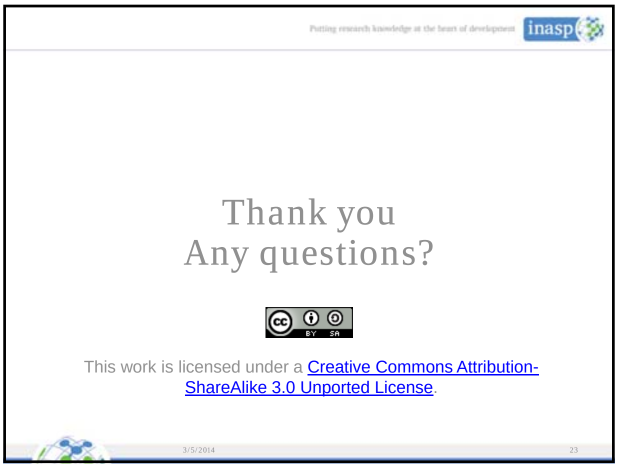

How to Register Your Institution
This is the step-by-step guide to completing the Research4Life online registration process. First, you need to make sure your institution is not already registered. There is a link to check the Registered Universities and Professional Schools:
http://www.who.int/hinari/faq/registration_and_eligibility_registered_universities/en/index.html
3/5/2014


http://registration.research4life.org/register/default.aspx
research4life
HINARI · AGORA · OARE · ARDI
From this page, institutions can register for 3 Research4Life programmes* (do NOT need to register for each individually and do NOT need to register to all of them). Check eligibility of your institution.
*ARDI currently has a separate registration page:
www.wipo.int/ardi/en/register_form.jsp


Note the detailed contact information that is required (Registrant, Librarian/Information Liaison, Director and Computer Support Officer). Please make sure you completely fill out the REQUIRED information or the registration cannot be properly processed.
Remember only one registration per institution is required. If not registered, complete form and click on Send Registration. Once the application is approved and processed, the library and director contacts will receive the HINARI welcome message. All members of the institution can use the institution's User Name and Password.
22


Putting research knowledge at the heart of development
inasp
Thank you
Any questions?
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3/5/2014
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Putting research knowledge at the heart of development inasp

Introduction to electronic resources management

Unit 2.2: Managing acquisition and purchase

Putting research knowledge at the heart of development inasp

Objectives

- Examine issues of sustainability, costs and resourcing
- Touch on consortia building issues

05/03/2014 2

Putting research knowledge at the heart of development inasp

Current situation

- Continuous price rises of information resources
- Continuous library budget stagnation or cuts
- Exponential growth in the production in new scientific information and knowledge
- Rapid technological advances

05/03/2014 3

Putting research knowledge at the heart of development inasp

Long-term access and purchase

- Electronic resources cost money
- Discounts and development funding subsidise these costs
- Will the discounts and funding always be available?
  - Prices are rising
  - Donor funding ceasing or diminishing
- Are the interests of publishers and libraries compatible?

05/03/2014 4

Putting research knowledge at the heart of development inasp

Possible solutions

- Secure increased funding
- Manage demand (cut demand?)
- Maximise leverage of existing funds
- Maximise effectiveness of existing resources
- Collective purchase through consortia

05/03/2014 5

Putting research knowledge at the heart of development inasp

Secure increased funding

- Demonstrate demand, usage, and effectiveness
- Outcomes of access—increased research, quality, etc.
- Implications of withdrawn access
- Efficiency of resource use
- Relationship with institutional strategy and additional criteria

05/03/2014 6

Manage demand

- Cut demand for resources?
- Unlikely—withdrawing titles is likely to be difficult
- Never a popular move

Selection and evaluation

of resources for purchase

- What criteria should be considered before purchasing a resource?

Selection criteria

- Reputation and credibility of the site and the publisher
- Relevance to user needs (user survey)
- Currency of the information
- Budget limits
- User input is critical in selection, particularly in academic institutions
- Librarians should be careful about packages offered by Publishers
- Librarians should be conscious about signing licenses

Selection: Areas of concern

- Pressure from publishers can be overwhelming.
- Ensure you are catering for user needs – is the content relevant?
- Insist on trials (evaluate usage and get feedback)
- Operate within your budget limits
- Cost effectiveness – are you getting value for your money
- Sustainability – can you sustain that particular subscription?
- **Seek advise from experienced license negotiators like INASP where possible**

Maximise leverage of existing funds—consortia building

What is a consortium?

- A consortium is an association of two or more individuals, companies, organizations or governments (or any combination of these entities) with the objective of participating in a common activity or pooling their resources for achieving a common goal.

http://en.wikipedia.org/wiki/Consortium

What is a library consortium?

- 'Library consortium' may be defined as "an association or group of libraries who come together to achieve the common goal of 'optimum users satisfaction' with the participation in a common activity and sharing the resources.“
  - http://wiki.answers.com/Q/What_is_library_consortium

Value of a consortium

- Your suggestions?

Working collaboratively enables libraries to....

- Share resources, expand services and programmes
- Avoid duplication of effort or activity
- Share talents and expertise
- Provide superior quality services
- Accomplish more than any single organization could

Consortia building

- Consortia may be the answer
- Building consortia can increase individual library's economic influence
- Electronic resources have changed the business model for publishers and so they have been more approachable to these areas
- But they do largely rely on the use of funds
- Development of philanthropic licensing and development funding

Consortia advantages

- Stronger position in negotiation
- Cost sharing
- Better prices
- More journals accessible
- Shared expertise
- Shared marketing and promotion
- Joint advocacy

» Hans Geleijnse
» http://www.lib.helsinki.fi/finelib/geleijnse/index.htm

Consortia disadvantages

- Time consuming
- Need fair mechanism to share costs
- Libraries may have to pay for resources they don't need

» Hans Geleijnse
» http://www.lib.helsinki.fi/finelib/geleijnse/index.htm

Different kinds of consortia

- National
  - Common model in INASP partner countries
- Local
  - A small number of institutions with specialist needs
- Regional
  - Institutions within a particular region work together
- International
  - Potential with many small countries (as defined above)
- Subject or sector specific
  - Cooperation on single or related disciplines, national or international scope

Malawi Library and Information Consortium

e-RESOURCES

CARLIGH CONSORTIUM OF ACADEMIC AND RESEARCH LIBRARIES IN GHANA

Zimbabwe University Libraries Consortium

KENYA LIBRARY AND INFORMATION SERVICES CONSORTIUM

Critical factors in successful consortia

- Sustainable funding model
- Transparent decision making
- Appropriate technical expertise
- Effective sharing of information
- Partnership
- Legal entity

Summary

- Electronic resources offer potential solutions to information shortages
- Must ensure sustainability of licensing fees and costs
- Consortia have proved a successful solution
- Consortia need to be included in library sector long term strategies

Thank you
Any questions?

Introduction to electronic resources management

Unit 2.3: Managing user access

Aims and objectives

- To get an overview of the issues involved in managing implementation and user access to electronic resources
- To consider constraints to the availability and use of resources
- To develop troubleshooting strategies and procedures

E-resource users need...

- Awareness
- Computers
- IT skills
- Searching skills
- Authentication
- Downloading
- Software
- Printers, etc

And support if they have difficulties with any of the above...

Consider

- Current situation?
- Can it be improved?
- What resources are available?
- What constraints are there?
- How can constraints be managed?
- Further information sources?
- Impact on users/ library staff/ management?

What strategies can we use to facilitate implementation and access?

Different people, different needs?

- Librarians
- Academics
- Researchers
- Students
- Others?

These differing needs should be considered throughout the workshop

Discussion

- Split into small groups
- Read through exercise worksheets
- Discuss and identify issues/strategies
- Identify top 2 priorities for each issue/area
- Report back

Exercise 2.3.1

Workshop exercise sheets containing:

- Instructions and format, etc
- ‘Issue sheets’ containing
  - Questions
  - Possible strategies
  - Quotes from other library staff/users

Example…

- Problem: users unaware of resources
- Priority: to advertise new electronic journals
- Constraints: lack of staff time, not all academics have email, lack of budget….
- Resources: university newsletter, meetings between researchers and library staff, students induction weeks….
- Strategies: advertise new resources in newsletter, place notices up in library, introduce electronic journals during induction weeks, etc

Action list…

1. Place notices about electronic journals in library
   - Who? —named member of library staff
   - When? —immediate and ongoing
2. Place article in university newsletter
   - Who? —library staff and newsletter staff
   - When? —once a month
3. Introduce electronic journals in student projects…..etc

Feedback

Loss of access

- Deliberate, publishers cancel access after abuse, systematic downloading
- Intermittent, faults with publisher website or internet connections at either end
- Unintentional, changes in IP address which library does not know about, changes to security settings, need to update version of Acrobat

Troubleshooting

- Librarian should become familiar with common problems and able to resolve them
- Consortium processes
- If one resource stops working, the problem may be with the publisher platform
- If all resources stop working, the problem may be with the institution's IT system

INASP help documents

- Interactive troubleshooting guide
- https://www.surveymonkey.com/s/INASP_troubleshooting
- Access support pages
- http://www.inasp.info/en/training-resources/e-resources/access-support/

Search and discovery systems

- Single search across all e-resources
- Fast response time
- Relevancy-ranked results list
- Tools for refining and using the results
- Connections to full text

Search and discovery systems

- Choice can be made from a range of systems – commercial, bespoke, open
- Systems allow for inter-operability so consortia are not tied to one provider indefinitely
- Technical expertise exists (or can be developed) within the consortium
- Metadata is readily available from publishers without requiring too much effort from consortia

Thank you
Any questions?

Day 2 Management of electronic resources

Unit 2.3: Managing user access

Exercise 2.3.1.1 Managing user access

Issue 1 - Awareness of resources

Work in: Groups of 4-5

Time: 20 minutes

Please be prepared to report back to the plenary session after discussion

Instructions

In your small group read through the quotes and suggested questions—these should be used to help start discussion.

Try to develop your ideas into a list of possible strategies that might improve the way people can save electronic information resources. The 'report back' form could be used as an aid to focus your ideas, ready to present to the rest of the groups.

Quotes from librarians and users

"My personal viewpoint is that we haven't done nearly enough to advertise and go out and say what we do,… people need to be aware of the electronic resource and know that they are stable. And then you can start to prune away at some of the print."

"…the lecturers themselves aren't particularly electronically aware. That's where I see the next big step for the library here is to start marketing actively. The librarians have done a good job, but they are talking to the ones who are interested, it's to get to the others…"

"I realise that most people, truly speaking, are aware more of books, they come and ask about books. And sometimes if they don't draw a clear distinction between books and bounded journals. So you tell them this is journal not a book. You find them searching and they are not getting the material and they wonder why, and then when you show them 'You need to go to journals title' or 'You need to go to electronic database' if you need this kind of report. Then they get their information and they're happy."

"if they use the computer to find a resource, sometimes they think it is free and they do not realise it comes from the library, you do have to explain to a lot of people…"

"…as the academics found that they could get things, that actually caused problems I would say, in that the academics then found they could access certain journals free on the Internet and were saying 'Well the library must make this available type of thing to everybody', and they didn't understand that, we have to pay the publishers. But the academics don't help the library get more budget to pay for resources so when they all fell away and couldn't get the access any more they complained and said, 'What's happened?' and 'Why can't I get it now?'"

Context

In what ways do library users and staff become aware of electronic resources at the moment?

Is there a need to improve awareness of electronic resources?

What resources are available to help raise awareness (e.g. library newsletters, web sites, staff skill, etc)?

What constraints there are on your ability to do this?

How can you manage these constraints?

Do different groups of people (e.g., library staff, academics, researchers, students, others) have different levels of awareness of electronic resources? Give details.

What support, if any, would the different groups need?

What further information could you gather to support your decisions?

What strategies could you use to raise awareness of resources within your library?

What would the implications of implementing these strategies be for library staff and management (e.g. more expense/time/training needed)?

Report back

Summary of problem

Constraints

Resources available or needed

Strategies to improve the situation

Actions (Who should do it? When would it need to be achieved by?)

Day 2 Management of electronic resources

Unit 2.3: Managing user access

Exercise 2.3.1.2 Managing user access

Issue 2 - Access to a computer

Work in: Groups of 4-5

Time: 20 minutes

Please be prepared to report back to the plenary session after discussion

Instructions

In your small group read through the quotes and suggested questions—these should be used to help start discussion.

Try to develop your ideas into a list of possible strategies that might improve the way people can save electronic information resources. The ‘report back’ form could be used as an aid to focus your ideas, ready to present to the rest of the groups.

Quotes from librarians and users

"We make do with the computers we had obviously, because we can’t to go out and spend millions."

"…when we had one reference area we had five or six computers, not online, mainly abstracts and indexes, not full text journals. We’ve only recently we moved into this new structure, so, that's when we had more access, and we keep an eye on the students as they like to use Facebook and email not library resources."

"We're living in a very developed part of the country but, there are still people here who don't have the basic things of life never mind access to computers and things like that."

"…employing more IT people and rolling out the IT equipment, we've rolled out about between five and six hundred new computers in the last two and a half years, getting that number of computers out is a logistically quite important,"

"[Students] find some way of, even if you put signs warning not to use email and Facebook. It’s tricky, but we do try and throw them off, because we don't have enough computers up here…It’s the fact that they're wasting time for academic research for somebody else."

"We have to go to the faculty and tell them 'Actually you can access the library from your desk' see, but some, for example the Humanities Faculty, have old computers and no internet access, so they couldn't access the libraries from their offices"

Context

What levels of access do library users and staff currently have to computers? Are improvements to this provision needed?

What resources do you have available to improve access (e.g. a computer lab, skilled IT staff, time)?

What constraints are there on your ability to improve access to computers?

How can you manage these constraints?

Do the different groups of people involved (e.g. library staff, academics, researchers, students, others) have different levels of access? Give details.

What support, if any, would the different groups need?

What further information could you gather to inform your decisions?

What strategies could you develop to help improve access to computers within your institution?

What would the implications of implementing these strategies be for library staff and management (e.g. more expense/time/training required)?

Report back

Summary of problem

Constraints

Resources available or needed

Strategies to improve the situation

Actions (Who should do it? When would it need to be achieved by?)

Day 2 Management of electronic resources

Unit 2.3: Managing user access

Exercise 2.3.1.3 Managing user access

Issue 3 – Downloading and saving material

Work in: Groups of 4-5

Time: 20 minutes

Please be prepared to report back to the plenary session after discussion

Instructions

In your small group read through the quotes and suggested questions—these should be used to help start discussion.

Try to develop your ideas into a list of possible strategies that might improve the way people can save electronic information resources. The 'report back' form could be used as an aid to focus your ideas, ready to present to the rest of the groups.

Quotes from librarians and users

"…if I'm just flicking through looking at abstracts, I'll read abstracts and scan stuff but if I want, if it's a piece of work I want, and I want in the future, I'll print it off. And I can write notes on it then and show it to people, there's the whole feeling that you've 'got' it then."

"I'm old fashioned about that, I tend to think, this latest electronic journal for example, they gave us free access for six months. I simply download the whole thing and I get it printed out."

"…at the end of the day I like to print stuff out and read it on paper."

"I'd be killing off half the Amazon rainforest if everyone printed out everything I want to, but I do print out quite a lot….I just keep things around for evidence and the nice thing is that it's so easily accessible."

"I save it on a disk, especially if I want like to quote something, so I don't have to …type again, but just save it on a disk, the sections which I'm interested in."

"I think printing is too expensive. Because its 50c per page, so if you have to do like fifty page document that's a lot, it creates some difficulties for certain persons who cannot afford it."

"Basically they use the electronic resources but the thing is they want to print, or they want to email it to their own addresses, or they want to save it on a disk, you see. So those are some of the problems that they face…."

Context

In what ways do library users and staff save material they want at the moment?

Is there a need to improve the ways in which this is done?

What resources are available to help (e.g.IT support within the library, etc)?

What constraints there are on your ability to improve this?

How can you manage these constraints?

Do different groups of people (e.g., library staff, academics, researchers, students, others) have different needs for saving material? Give details.

What support, if any, would the different groups need?

What strategies could you use to improve people's ability to save material they want?

What would the implications of implementing these strategies be for library staff and management (e.g. more expense/time/training needed)?

Report back

Summary of problem

Constraints

Resources available or needed

Strategies to improve the situation

Actions (Who should do it? When would it need to be achieved by?)

Day 2 Management of electronic resources

Unit 2.3: Managing user access

Exercise 2.3.1.4 Managing user access

Issue 4 - How to search for and find the material

Work in: Groups of 4-5

Time: 20 minutes

Please be prepared to report back to the plenary session after discussion

Instructions

In your small group read through the quotes and suggested questions—these should be used to help start discussion.

Try to develop your ideas into a list of possible strategies that might improve the way people can save electronic information resources. The ‘report back’ form could be used as an aid to focus your ideas, ready to present to the rest of the groups.

Quotes from librarians and users

"At the beginning of the semester we have orientation anyway around the library, and we have specific lunchtime or during the day courses. We split them into using the catalogue, which is the basic 'How to find stuff in the library', and then we have how to do relevant and useful searches on the Internet."

"I try to show students how to look something up in the catalogue so that next time they can do it themselves, but it takes a lot of my time"

"The person who does the Web page is responsible for putting down the electronic resources information onto the Web site and for persuading, cajoling, coercing the librarians to get their libraries, their departments on to the Web,…I tend to have multiple points of entry into the Web or into the sites which host the journals, previously people might be expected to go into the catalogue, but in actual fact here we have lists of electronic journals, they can search by title, very quickly and easily”

"Our own online catalogue I think is terrible, I think there's too much available, you can go at great length. OK, I speak to you as a non-librarian. I think librarians love it because you can do all sorts of things with it and it’s really powerful, but as your normal user, you don't know all the tricks of the trade. I think you know maybe you really need to have two interfaces, one nice simple keyword search or browse, and then your more sophisticated interface which your librarian will set up the search for you."

Context

In what ways do library users and staff find electronic resources at the moment?

Is there a need to improve the ways people search for and find information?

What resources are available to help improve searching (e.g. courses, workshops, ‘cheat sheets’, etc)?

What constraints there are on your ability to do this (examples of the sort of constraints that may apply are given in section 3)?

How can you manage these constraints?

Do different groups of people (e.g., library staff, academics, researchers, students, others) have different levels skill in finding for material they need? Give details.

What support, if any, do the different groups need?

What further information could we gather to support our decisions?

What strategies could we use to improve searching skills within our library population?

What would the implications of implementing these strategies be for library staff and management (e.g. more expense/time/training needed)?

Report back

Summary of problem

Constraints

Resources available or needed

Strategies to improve the situation

Actions (Who should do it? When would it need to be achieved by?)

Day 2 Management of electronic resources

Unit 2.3: Managing user access

Exercise 2.3.1.5 Managing user access

Issue 5 – Authentication and access to material.

Work in: Groups of 4-5

Time: 20 minutes

Please be prepared to report back to the plenary session after discussion

Instructions

In your small group read through the quotes and suggested questions—these should be used to help start discussion.

Try to develop your ideas into a list of possible strategies that might improve the way people can save electronic information resources. The 'report back' form could be used as an aid to focus your ideas, ready to present to the rest of the groups.

Quotes from librarians and users

"At the moment the licenses that we're signing for electronic resources limit use to staff and students…some of the databases do have that very strict line about who can use it and some are very flexible and walk-in users of the library are allowed to use the things. But how, you know the librarians out there, how do they know if someone should use the material and how they are using or abusing it?"

"I'm using journals, Law journals. So because of the IP address I cannot access them from here, I have to go to the Law library, and that's the only place I can access them."

"…usually I use EBSCO myself as it recognises my institution. And then the other ones which need the password, those ones I go to the permanent staff, like the librarians."

"We subscribe to their resource, but you click on a link and it goes straight to a page that requires a password and a user ID and stuff like that. But I prefer Emerald because permission is already there, they know where you're coming from."

"…you can sign up for off campus library use, which is then going to be IP authenticated. With our set up on campus, we all go through a proxy server so the computer at the other end is looking at our proxy server's IP and not the individual computers IPs. So, I can log on from home or from an internet café and use resources the same as if I was in the library"

Context

In what ways do library users and staff get authentication to access material at the moment?

Is there a need to improve the way in which authentication of users is done?

What resources are available to help (e.g. information/support from publishers, IT staff)?

What constraints there are on your ability to do this (examples of the sort of constraints that may apply are given in section 3)?

How can you manage these constraints?

Do different groups of people (e.g., library staff, academics, researchers, students, others) have different needs with regard to authentication? Give details.

What support, if any, might the different groups need?

What further information could we gather to support our decisions?

What strategies could we use to improve access and authentication management within our institution?

What would the implications of implementing these strategies be for library staff and management (e.g. more expense/time/training needed)?

Report back

Summary of problem

Constraints

Resources available or needed

Strategies to improve the situation

Actions (Who should do it? When would it need to be achieved by?)

Introduction to electronic resources management

Unit 2.4: Monitoring and evaluation of access and use

Monitoring

- Knowing what is happening

For example:
how many people use e-resources?
which departments do they come from?
which resources do they use?
when do they use them?
where do they use them?

Evaluating

- Understanding what is happening

For example:
why are some resources popular?
why do some resources never get used?
is your service good value for money?
are you meeting your organisation's objectives?

Evaluation

Evaluation
- is a process for gathering and interpreting data to find out if a service is worthwhile or meets specified criteria

Evaluation enables you to
- Discover problems
  - First step to solving them
- Discover strengths and success
  - Celebrate!
  - Leverage for more support or funds

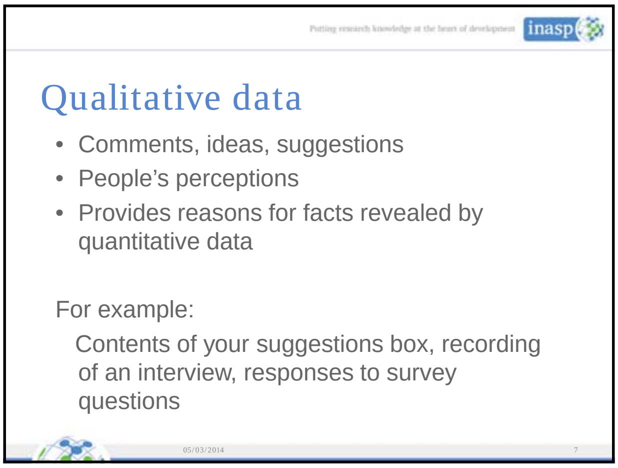
Exercise 2.4.1

- What information is needed for monitoring and evaluation of electronic resource usage?
- How can libraries use this information?

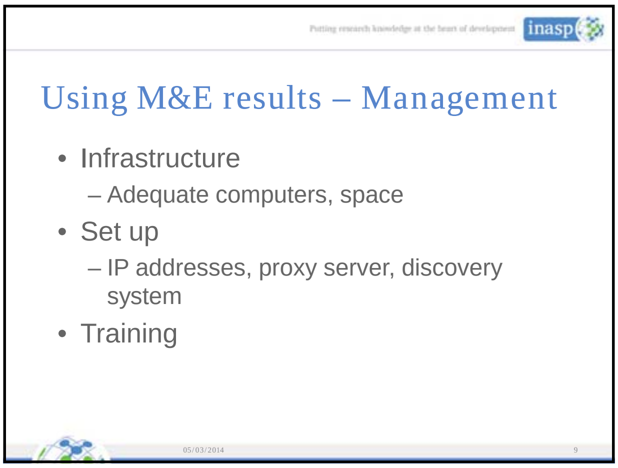
Quantitative data

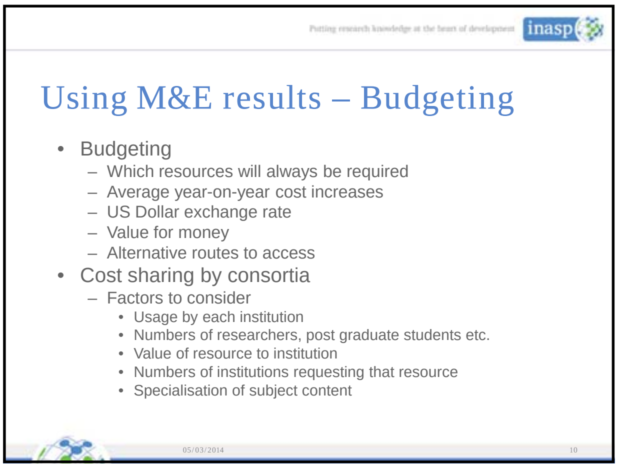
- Provides facts
- Uses statistics
- Can be a basis for the collection of qualitative data

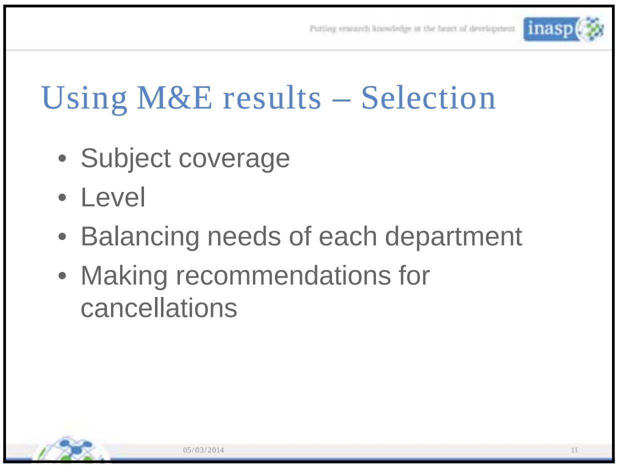
For example:
Statistics of log-ins, number of bookings for computer, number of hours a week that service is available

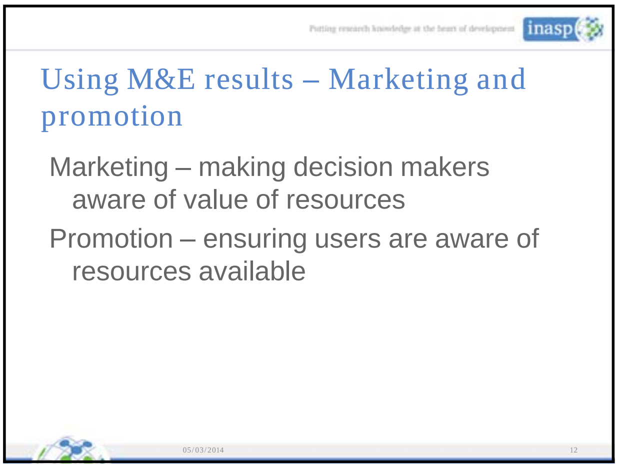

inasp
Qualitative data
• Comments, ideas, suggestions
• People's perceptions
• Provides reasons for facts revealed by quantitative data
For example:
Contents of your suggestions box, recording of an interview, responses to survey questions
05/03/2014
7

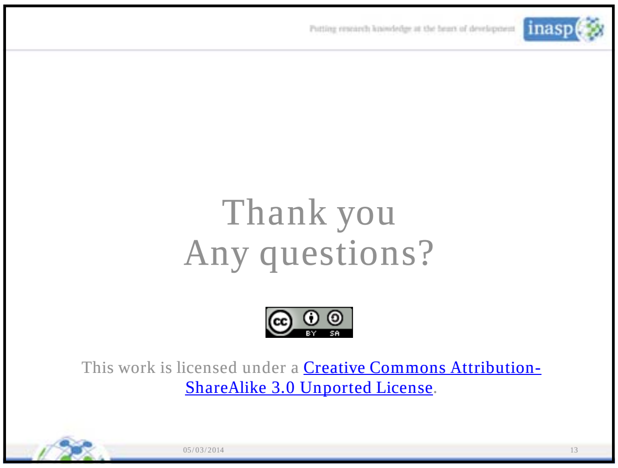

inasp
Using M&E
• Planning and management
• Budgeting and cost sharing
• Selection
• Marketing and promotion
05/03/2014
8


inasp
Using M&E results – Management
• Infrastructure
– Adequate computers, space
• Set up
– IP addresses, proxy server, discovery system
• Training
05/03/2014
9


inasp
Using M&E results – Budgeting
• Budgeting
– Which resources will always be required
– Average year-on-year cost increases
– US Dollar exchange rate
– Value for money
– Alternative routes to access
• Cost sharing by consortia
– Factors to consider
• Usage by each institution
• Numbers of researchers, post graduate students etc.
• Value of resource to institution
• Numbers of institutions requesting that resource
• Specialisation of subject content
05/03/2014
10


inasp
Using M&E results – Selection
• Subject coverage
• Level
• Balancing needs of each department
• Making recommendations for cancellations
05/03/2014
11


inasp
Using M&E results – Marketing and promotion
Marketing – making decision makers aware of value of resources
Promotion – ensuring users are aware of resources available
05/03/2014
12


inasp
Thank you
Any questions?
This work is licensed under a Creative Commons Attribution-ShareAlike 3.0 Unported License.
05/03/2014
13

Day 2 Management of electronic resources

Unit 2.4: Monitoring of access and use

Exercise 2.4.1 Why monitor access and use

Work in: Groups of 4-5

Time: 20 minutes

Please write EACH thought on a separate post it note, and stick it on the flip charts provided. You may be asked to expand your ideas to the plenary session during discussion.

Discuss the value of M&E of e-resources. The questions below are just guides to start discussion

- What information could be helpful to monitor e-resource usage?
- What information could be helpful to evaluate e-resource usage?
- How could libraries use this information?
- How could they gather this information?

The E-Resources Management Handbook – UKSG

Usage statistics and online behaviour (2)

ANGELA CONYERS
Senior Research Fellow, Evidence Base
Birmingham City University

This updated chapter looks at the reasons for collecting usage statistics at both local and national level and identifies the various sources available. Some of the issues involved in the collection of usage statistics are considered and particular mention is made of the success of COUNTER in introducing greater consistency and reliability. Methods of analysing usage statistics with a range of other variables are put forward. These can be used to build up a picture of online usage and to provide a firm quantitative basis for more qualitative research into user behaviour. Issues that may impact on usage statistics and online behaviour in the future are also briefly considered.

The original version of this chapter (published in 2006) can be accessed at http://uksg.metapress.com/openurl.asp?genre=article&id=doi:10.1629/9552448-0-3.2.1

Introduction

This chapter sets out to explore the variety of statistics that are now available to measure use of electronic resources, and some of the issues connected with them. It will look at how reliable usage statistics can form the basis of a range of analyses at both local and national level and how usage statistics combined with other data can present a picture of how online services are being used. The chapter is based mainly on research within the UK higher education community, but the findings are applicable to any library or group of libraries that wishes to explore more fully their use of online resources.

Evidence Base is a research and evaluation unit based within Library and Learning Resources at Birmingham City University and over the past few years it has conducted a number of studies on the usage of electronic resources within UK higher education libraries. These have included:

Study and analysis of usage statistics for the UK NESLi2 deals

The NESLi2 study aimed to provide JISC Collections and its Journals Working Group (JWG) with accurate and up-to-date data on national use of journals available through the NESLi2 initiative[1]. This is the UK national scheme for the licensing of e-journals on behalf of the higher and further education and research communities. The study took usage data from four major NESLi2 publishers for 17 higher education libraries over an 18-month period (January 2003 – June 2004) and analysed these in relation to cost, price, subject category and usage range. A framework for analysis was devised that could be further developed with other libraries and publishers. The study provided evidence of the difficulties inherent in the interpretation and analysis of usage statistics and the amount of time needed to achieve meaningful results. Recommendations for providing support to libraries in their analysis of the value of the NESLi2 deals included the provision of a usage statistics portal, for which a prototype has now been developed.

A summary report of the study findings can be found on the NESLi2 website[2].

Assessing the value of the NESLi2 deals

In a further study for JISC Collections[3], Evidence Base developed the methodology devised for the analysis of NESLi2 usage statistics to provide suggestions for libraries on how they could firstly assess the value of a deal prior to purchase, and then assess how much it had been used, as an aid to renewal decisions and library promotion.

E-measures project and the SCONUL Annual Library Statistics

The e-measures project was funded by the Higher Education Funding Council for England (HEFCE) under the Good Management Practice Programme and aimed to assist libraries with the use of statistics for decision-making and user support. As part of this project, Evidence Base worked with the Society of College, National and University Libraries (SCONUL) to devise a set of performance indicators for electronic resources for inclusion in the SCONUL Annual Library Statistics[4]. In addition to the amount of data collected from a sample of 25 higher education libraries, the project highlighted the variety of methods in use for data collection and the issues that libraries then faced in attempting to get reliable and consistent data.

The new e-measures questions allowed SCONUL to gain a picture of the extent of the shift to electronic delivery in the UK higher education sector at that time and enabled performance ratios to be established[5]. First introduced in 2003–4, the e-measures questions are currently being revised and updated by the SCONUL Working Group on Performance Improvement (WGPI) to take account of the changes in electronic services over the past few years and their growing importance.

Evidence Base Publisher deal project

Evidence Base is also working with a group of higher education libraries on the analysis of selected NESLi2 publisher deals[6]. Over 20 libraries have now taken part in this self-funding project, which supports libraries in developing management reports based on the analysis of usage statistics using templates and manuals devised for the project.

Why collect usage statistics?

In the present economic climate, providing evidence of the use that is being made of the library's e-resources must be seen as an essential element of good management. Without evidence to show how e-resources are being used, it is very difficult to demonstrate the value of the resources in which the library has invested, either in monetary 'cost-per-use' terms or in terms of the impact on the university's learning, teaching and research. Usage statistics therefore underpin much of the analysis that is needed for directors of library and information services to demonstrate the value of the library's contribution to stakeholders, be they heads of academic departments or university senior managers.

Challenges to the 'big deal' approach by Rolnik[7], Taylor-Roe[8] and others show how important it is for libraries to have accurate information on how a particular deal is being used and whether it offers good value for money.

In this environment, it is important first of all to determine the purpose for which usage statistics are needed as this will help decide what statistics to use and how they are to be analysed and presented. Some major reasons are given below, with examples of questions that can be asked.

Budgeting

- How do usage statistics demonstrate value for money and justify the library's expenditure?
- What is the balance of spending and usage in different subject areas?

Making renewal decisions

- How much has the resource been used?

- What is the average cost per request?
- How many titles in the deal are receiving nil or low use?
- How do average costs, total costs and usage patterns compare with other deals?
- What is the value of subscribing to a deal rather than to individual subscribed titles?

Library promotion and publicity
- How many requests for a particular group of resources have there been over a specified period?
- What is the percentage increase in usage over time?

User support
- Are there particular resources that are not being used as much as expected?
- Should more attention be given to promotion?
- Which are the most popular routes for access? (Google, Google Scholar, directly from publisher, A–Z library pages, through library catalogue, link resolver, etc.)

Benchmarking
- How does the library compare in terms of number of requests and costs per request with other libraries of similar type or size?

Contribution to national overview
- What trends are emerging nationally on the use of electronic resources? How do these relate to statistics on traditional library services, such as number of book issues, number of inter-library loans?

Schufreider found a similar set of reasons given by US libraries taking part in the beta-testing of Scholarly Stats[9], as did the MaxData study of OhioLINK libraries led by Carol Tenopir at the University of Tennessee[10]. While usage statistics alone cannot provide a complete answer to all these questions, they can certainly contribute to any analysis and inform decisions on how results can be presented.

Identifying the source of usage statistics

Publisher or vendor

For serials, databases and e-books, the primary source of usage statistics is the publisher or vendor. These statistics are generally available on a monthly basis from the publisher or vendor website, and currently have to be downloaded by the individual library using passworded access. The arrival of the SUSHI (Standardized Usage Statistics Harvesting Initiative) protocol[11] means that in future it will be possible to retrieve usage reports using an automated process as publishers start to adopt the new standard, which is now a requirement for compliance with COUNTER release 3.

Gateways, hosts and aggregators

If the library gives access to e-serials via a gateway service, such as SwetsWise, or a hosting service, such as Ingenta, then separate usage statistics for this type of access will generally be provided. These will give a record of the volume of usage through the particular service and will need to be added to the statistics downloaded from the publisher to gain a full picture of usage.

Libraries may choose to get full-text journal titles through aggregator databases such as ProQuest in addition to or in place of direct purchase from publishers. In this case, usage statistics are recorded separately by the database vendor. It is interesting to look separately at such usage, to see how the databases are being used and which full-text titles are popular. It is also useful to add the aggregator usage statistics to those coming directly from the publisher, in order to get a full record of e-journal use. Care must be taken, however, not to include these figures when looking at publisher usage statistics with a view to renewal or assessing value for money of the publisher deal.

Authentication systems

Some libraries have used Athens statistics to show how much usage is coming from a particular source (e.g. on or off the campus) or from a particular group of users. This provides good management information of a type not available from publisher or vendor usage statistics. Its use for this purpose will depend on the way user groups are identified through passwords and on how access through Athens authentication is organized for on-campus and off-campus users. Services such as EZ Proxy[12] can also provide information about on- and off-campus use.

More recent services, such as the bX Recommender Service from Ex Libris[13], provide an illustration of the type of Web 2.0 services that are likely to become more familiar in libraries over the next few years. bX Recommender takes article-level usage statistics from the link resolvers of contributing institutions and offers these to users in subscribing institutions in the form of article recommendations as soon as they log in to the library system.

The move to Shibboleth single sign-on authentication[14] is likely to lead to greater use of the library's e-resources by taking away the need for individual user names and passwords for separate services within the university. It is not yet clear what usage statistics can be provided, or how these will match with publisher usage statistics. Much will depend on how Shibboleth passwords are set up within institutions.

Web-logging software

For gathering information on usage of digital documents produced in-house, on virtual visits or hits on the library website, and on enquiries received electronically, it is necessary to have installed on the relevant servers appropriate web-logging software such as Webtrends[15]. The number of different systems in use, the different ways they might be set up, statistics of on- and off-campus use mean that this type of statistic is not generally a reliable indicator of usage for benchmarking purposes, though it can provide useful background information on usage patterns.

Library management systems and electronic resource management systems

Increasingly, library systems suppliers are providing means of linking directly to electronic resources. Usage statistics from such sources will provide useful guides to the amount of traffic going through the particular route, but will not of course pick up on requests for e-journals or other electronic resources made through Google or Google Scholar, or directly through the publisher or vendor website.

As a further development, electronic resource management systems, working with the SUSHI protocol, will in time be able to gather all e-resource usage data.

Finding consistent and reliable usage statistics

Publisher and vendor usage statistics (supplemented where necessary by gateway or aggregator statistics) are therefore the primary source of usage statistics, although other sources noted above may provide valuable supporting information or provide statistics where no other routes are available. Over the past few years, the COUNTER[16] initiative has been responsible for a great improvement in the quality, reliability and consistency of usage statistics from publishers and other vendors and has made the task of collecting and analysing usage statistics far more straightforward and trustworthy.

COUNTER

COUNTER provides an excellent example of an international co-operative project involving both librarians and publishers and other vendors. COUNTER issued its first Code of Practice for journals and databases in December 2002. Subsequent revisions have introduced new reports and requirements and clarified procedures, and the third Code of Practice was issued in August 2008, for implementation by 31 August 2009. Independent annual audit is now required to ensure that reports and processes conform to COUNTER requirements.

Release 3 requires the implementation of the SUSHI protocol which will allow the automated retrieval of COUNTER usage reports. This link between SUSHI and COUNTER should ensure that publishers make every effort to comply with the SUSHI protocol within a short space of time. Release 3 also makes separate reporting of use of backfiles or archives a requirement.

COUNTER reports for journals

For journals, the COUNTER Code of Practice release 3 has six reports:

- JR1 – number of successful full-text article requests by month and journal
- JR1A – number of successful full-text article requests by month and journal for a journal archive
- JR2 – number of turnaways
- JR3 – successful item requests and turnaways by month, journal and page type
- JR4 – total searches run by month and service
- JR5 – number of successful full-text article requests by year of publication and journal.

JR2, JR3 and JR4 reports are not mandatory for COUNTER compliance. Vendors are required to offer either JR1A or the new report JR5 in respect of backfile or archive collections.

In the list of COUNTER-compliant vendors for release 2 (dated July 2009)[17] 95 vendors are listed as COUNTER compliant in respect of the JR1 report. This compares to 15 in October 2003 and 38 in May 2005 and demonstrates the continuing success of COUNTER in persuading most of the main e-journal vendors to sign up and be audited for compliance. The work of COUNTER and its widespread acceptance has undoubtedly helped librarians to have greater confidence in serials usage statistics as being comparable across publishers and over time.

COUNTER reports for databases

There are three COUNTER reports for databases:

- DB1 – total searches and sessions by month and database
- DB2 – turnaways by month and database
- DB3 – total searches and sessions by month and service.

There were 22 vendors listed in July 2009 as providing DB1 reports and 43 providing DB3 reports. This compares to 6 and 8 respectively in October 2003 and 12 and 14 in May 2005. Numbers are therefore increasing, though there still remain significant database providers who are not yet supplying COUNTER-compliant reports.

There is a requirement to distinguish in the DB1 and DB3 reports between database searches and sessions involving just one database or set of databases from federated and automated searches and sessions which cover multiple databases from different vendors. Over recent years, the impact of federated and automated searches has led to a vast increase in database usage figures. While a proportion of this may represent genuine cross-searching, much will relate to the automated searching of databases which bear no relevance to the search query. The distinction between these different types of searches is helpful in enabling libraries to get a clear view of searches and sessions relating to a database or set of databases to which they have subscribed. On the other hand, libraries may also wish to keep a record of federated and automated searches to illustrate how widely the library's e-resources are being used.

COUNTER reports for e-books

The first release of the COUNTER code of practice for books and reference works[18] was introduced in March 2006 There are six reports:

- BR1 – number of successful title requests by month and title
- BR2 – number of successful section requests by month and title [a section is defined as a chapter or entry]
- BR3 – turnaways by month and title
- BR4 – turnaways by month and service
- BR5 – total searches and sessions by month and title
- BR6 – total searches and sessions by month and service.

In July 2009, 25 vendors were listed as COUNTER compliant in respect of one or more of the book reports, 15 for BR1 and 13 for BR2[19]. While the e-book market has yet to become as firmly grounded as that for e-journals, it is encouraging to see the number of vendors now included.

Issues in the collection of usage statistics

In spite of the great advances in recent years in the reliability of usage statistics, there remain issues to be resolved. The number of e-mails on UKSG's e-mail list[20] and on the lib-stats list[21] testify to the problems that may be encountered, but also serve as a useful forum for dialogue involving both librarians and publishers at an international level, as a source of advice, information-sharing and problem-solving.

Changing publishers

Tracking titles that change publisher may cause difficulties. The UKSG's Transfer initiative[22] aims to establish a set of standards for transfer of titles and has issued a code of practice to which a number of major publishers have now signed up.

Matching up titles

New titles may be added to a publisher's list in the course of a year, and old titles with only limited volumes available may still appear in usage statistics reports. Usage reports may also include titles which are not available in the deal to which the library subscribes. The number of titles included in usage reports for libraries which have the same deal may vary, and the number of titles listed is likely to be different from those listed as being part of the particular deal the library takes. This may make it difficult for libraries to establish exactly which titles within their usage statistics report they actually have full access to, and in particular to identify among nil-use titles which ones represent genuine nil use.

Dealing with databases

There has been much blurring of the lines between a database and a serials or e-book collection in recent years as more databases include full-text titles in addition to or in place of their traditional abstracts and indexes.

As shown above, databases from COUNTER-compliant vendors provide, where relevant, both JR1 reports on usage of their full-text journals and DB1 and DB3 reports on searches and sessions in the databases themselves. Those that supply e-books also supply BR reports on their e-books. There may well be an element of double counting in respect of the number of titles held, with the same titles being available both within serials collections and databases, such as ABI Inform, etc. The JISC Academic Database Assessment Tool (ADAT) allows comparison of titles held within particular databases or e-book collections[23].

It is therefore important to record usage both of individual items within the database and of the database itself, if a full record of usage is required.

Counting use of e-books

The COUNTER code of practice for books and reference works should over the next few years introduce the same amount of consistency as can now be seen with e-journals. At present, vendors are divided as to whether they can report the number of successful title requests (BR1), the equivalent of a printed book issue figure, or the number of successful section requests (BR2), the equivalent of an article download. This poses problems for libraries in deciding what statistic to collect on a regular basis and how to make comparisons between different services. At the same time, showing trends in use of e-books is important to see what effect this will have in future on other library services.

Analysis of usage statistics

Collecting usage statistics for e-resources (whether nationally for SCONUL or other national library statistics, or locally within the library) is certainly not as straightforward as counting book issues. The process of getting passwords for individual access to publisher websites is time-consuming. Once downloaded, gateway, host and aggregator statistics may have to be added, and the statistics sorted and presented in such a way as to be meaningful to a wider audience. In a report of a survey of research libraries in the US and Canada during 2005, the amount of time libraries spent on collecting and analysing usage statistics varied from one hour a year to 2,080, with an overall median of 98 hours. Generally, more time was spent on collecting the usage statistics than in analysing them.[24]

Although SUSHI may make it easier in future to get access to usage statistics, much manipulation of data still remains to be done by the individual library. Without further analysis, usage statistics on their own have little meaning and certainly cannot be presented in their original format as evidence to stakeholders of the value of investment in a particular publisher deal or e-book package.

Evidence Base has developed an approach to the collection and analysis of usage statistics arising from its work for JISC Collections on the analysis of the NESLi2 deals[25]. They have used this approach with libraries in the 'publisher deal' project[26] and in their work with individual libraries. Usage statistics on their own can illustrate trends over time and patterns of use through the academic year, but for further analysis it is necessary to apply other variables in order to establish performance ratios. The following ideas are suggested:

- *usage range*
  The number of successful requests for each title over a given period can be sorted by usage range, with categories for nil, low, medium, high and very high usage. This makes it possible to show the percentage of total requests falling into each usage range and gives a measure of comparison across libraries and across publisher deals.

  It is recognized that a certain number of titles within a deal receive very high use. This method allows those titles to be identified and also shows what percentage of total requests come from this relatively small percentage of titles.

- *price range*
  Whether subscribing to individual titles or buying into a deal, it is useful to be able to look at the list prices of all titles to which the library has access. Using the publisher list prices, titles within a deal can also be divided into low, medium, high and very high price ranges. The same price ranges should be used across all publisher deals, so that the percentage of high or very high price titles in each can be compared. It is then possible to look for a correlation between journal price and journal use, to see if high-cost titles are used more and low-cost titles used less.

  Publisher price lists are now easier to track down from a central location provided by UKSG, which now lists the URLs for current price lists for over 90 publishers.[27] The information is not, however, provided in a standard format and may not relate to titles available within a particular deal, so that matching prices to titles can be challenging. Ongoing work with ONIX for Serials may lead to improvements.[28]

- *subject category*
  Publisher price lists or other title lists may also include a subject category for each title as assigned by the publisher. It is possible to divide these subject categories into broad areas such as science, technology and medicine (STM) and humanities and social sciences (HSS) in order to analyse the composition of a deal and to look for different usage patterns across the two areas.

  More detailed subject breakdown is also helpful, particularly where the library's budget is devolved to academic schools or departments. In such cases, the subject categories can be allocated to the schools or departments and both usage and costs viewed on a subject basis. This is not an exact science, as subject categories will rarely fit neatly with a particular academic structure and many journals are multi-disciplinary, but it does provide some useful guidance. It would be helpful for this type of

analysis if a universal form of subject category could be applied to all titles rather than having each publisher supply their own.

- *subscribed titles*
  Under the present pricing models, much of the cost of a particular deal goes on maintaining existing subscriptions. Details of subscribed titles are therefore important, whether the library continues to have these in print form or has opted for an e-only package.
  Identifying the subscribed titles enables the library both to show how well these are being used (and to identify those with low use) and also to show the extent to which 'non-subscribed' titles are also being used, thus demonstrating the value of subscribing to a deal rather than taking individual subscribed titles. Bucknell[29] gives a description of this approach as used to good effect at the University of Liverpool.

Contextual information

In addition to information relating directly to the journal titles themselves, additional information is needed if key performance indicators are to be derived from the usage statistics.

- *Costs*
  Of all derived ratios, those showing value for money are likely to be of the greatest interest. To establish 'average cost per request', it is necessary to have a complete record of costs of the deal, including the maintenance of subscribed titles. It is possible also to look separately at the costs of subscribed titles, using the subscription costs and any associated e-access fees, and the additional costs of e-access to all other titles included in the deal to break down the 'average cost per request' into 'average cost per subscribed request' and 'average cost per unsubscribed request'. A 'yield per £' can be calculated by comparing the list prices of 'non-subscribed' titles with the additional cost of e-access, showing the amount that is gained for each pound of e-access expenditure. These costs can then be compared with the costs of other methods of document delivery such as inter-library loan or pay-per-view to establish value for money.
  Further information on these calculations can be found in the Evidence Base report to JISC Collections on the value of NESLi2 deals.[30]

- *FTE users*
  Usage can also be viewed in relation to the number of full-time equivalent (FTE) users (FTE students and academic staff). While it could be argued that this is not a valid measure, as all FTE users are unlikely to be using the same e-resource, for benchmarking purposes it provides a good point of comparison.

- *Nil-use titles and availability*
  It is a common complaint that the big deal forces libraries to buy titles that they do not need and do not use. A straight reading of usage statistics suggests that it is frequently the case that a large percentage of titles are not used. However, a more detailed analysis of these 'nil-use' titles may show that a significant proportion of them are not actually available in the deal because they have not yet been added or have recently been removed.
  In order to arrive at an accurate figure for nil use, those titles included in the list of usage statistics but not included in the deal need to be removed from the analysis. Further examination of remaining titles can then give a truer picture of non-use and will indicate whether there is a real cause for concern.

Where to get help

In addition to the sort of help provided by research and consultancy units such as Evidence Base and the wealth of informal advice offered through e-mail lists such as lis-e-resources and lib-stats, a number of commercial products now exist that will help libraries in the analysis of usage statistics. These include Scholarly Stats[31], Serials Solutions 360 Counter[32] and Thomson Reuters Journal Use Reports.[33]

Contextualizing the data

The type of analysis outlined above enables as much quantitative information as possible to be gleaned from any set of usage data. It does not, however, give any qualitative information in respect of the actual use that students and academic staff are making of the online services in which the library invests so heavily. Who are the actual users? How many of them are undergraduates rather than researchers? If users have downloaded an article, how useful have they found it? In one respect this is no different from knowing when they borrow a book or photocopy a journal article whether they have actually read it or how useful it was. This should not, however, deter libraries from getting behind usage statistics to see what is going on, so that they can understand more about online behaviour. This will help inform strategies for information literacy training, technical support and promotion of services. Decisions on moving to an e-only environment or making print journals less accessible may provide opportunities for exploring the effect on users by focus groups, web surveys or other qualitative research methods. The support from UK higher education libraries to take part in the annual LibQUAL+ surveys[34] demonstrates the importance attached to obtaining qualitative data on library use and possibly, in future, to benchmarking it.

As reported by the Research Information Network (RIN)[35], the deep log analysis approach introduced by the research centre CIBER, based at University College London (UCL), has used raw usage data to provide further information on usage patterns of e-journals within selected research-led universities. The same method is also being used for the analysis of e-book usage for the JISC National E-books Observatory Project[36].

Deep log analysis findings here have been supplemented by qualitative data from case studies and focus groups. Tenopir and King have studied reading patterns among researchers over a 30-year period, and are therefore well placed to track changes in user behaviour since the advent of e-journals.[37]

What next?

While usage statistics may tell us a good deal about what titles are being used, they still leave significant gaps in our knowledge.

What articles are being downloaded?

Within a certain title, certain articles may prove to be more popular than others and may account for a high proportion of total requests. The PIRUS (Publisher and Institutional Usage Statistics) project has established the technical feasibility of obtaining COUNTER-compliant article-level usage statistics to record repository and other online journal article platforms[38] and this will be further developed in PIRUS 2[39]. The establishment of a 'journal article-level report' may then be extended to publisher usage statistics.

While access to journals for which subscriptions have been paid will still be tracked via Google or Google Scholar through authentication systems, direct access to journal articles through repositories or other open access routes may not be recorded. This may in future have a significant effect on overall journal usage.

What is the status of the journal?

Once a deal or an individual title has been purchased, usage statistics provide a good guide to its popularity. However, how do you decide which journals to buy, and if you are an author, which journals to publish in? For researchers, the impact factor (IF) based on the Thomson Reuters Journal Citation Reports[40] is an important consideration. The Journal Usage Factor now under investigation by UKSG[41] will provide a usage rather than citation-based measure.

Who are the users?

As noted above, it is virtually impossible to identify from the usage statistics who the actual users are. It is doubtful whether any authentication system will be able to provide a great level of detail on this, though focus groups or surveys can be used to good effect to establish likely usage patterns.

Conclusion

The emergence of more reliable usage statistics through the work of COUNTER now makes it possible for libraries to take a more systematic approach to their analysis and to build up from this statistical base a clearer picture of online behaviour. A number of initiatives are now looking at various aspects of usage statistics and online behaviour and these are likely to have an impact on our understanding of this area in future.

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Biographical note

Dr Angela Conyers is Senior Research Fellow at Evidence Base, Birmingham City University. She has done much work in the area of usage statistics, including the NESLi2 study and analysis of usage statistics for the Joint Information Systems Committee (JISC) and work on the prototype JISC Usage Statistics Portal. She is responsible for the Evidence Base Publisher Deals project which supports libraries in the collection and analysis of usage statistics and works with the Society of College, National and University Libraries (SCONUL) on the e-measures questions included in the SCONUL Annual Library Statistics. Before moving into research in 2003, she was for 13 years Director of Library Services at Canterbury Christ Church University.

Introduction to electronic resources management

Unit 2.5: Marketing and promotion

Objectives

We will consider a range of strategies to actively market and promote e-resource collections:

- Discuss a range of e-resource marketing strategies
- Promotional materials available from publishers
- Practical measures
- Constraints

05/03/2014 2

What is marketing?

05/03/2014 3

Marketing's about…

Engaging with users

Being proactive

Reaching out

05/03/2014 4

And..

demonstrating

your value

05/03/2014 5

2.5.1 Why market your e-resources?

- Take a moment to think on your own …
  … then discuss with your neighbour
- Identify as many reasons as possible why you should market e-resources

05/03/2014 6

Jacinta Were, Univ of Nairobi

- Libraries no longer have the monopoly to providing access to information
- Libraries must provide access to electronic information to remain relevant
- Although we have strengthened our collection with electronic resources, we face competition and hence we must have aggressive and effective marketing strategies

Changing market

The major challenge is how to address the following:

- How do we (librarians) satisfy the changing needs
- How do we attract users back to our services
- How do we sensitize them on the quality of internet information

Some key principles for marketing in a library context

Ned Potter, The Library Marketing Toolkit
www.librarymarketingtoolkit.com

A study of 200 African university library websites [undertaken by INASP, 2012]

59 linked to e-resources from the main university homepage

104 linked to e-resources from the library website

48%

of library websites didn't link to e-resources!

Marketing tips

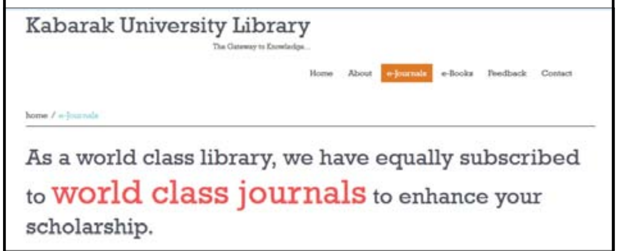
- Website
  - the library should incorporate visual and interactive design into the web site to make it user friendly
  - Instructions on how to access
  - The Library should be given prominence on the organization's homepage
- User friendly access interface
  - All e-resources should be listed and accessed from the same point on the website through an interface

Getting started

- Use the INASP publisher pages to get started

http://www.inasp.info/en/network/publishers/

Focus on the benefits…



Some principles

1. Help users get from A to B more effectively
2. Think about marketing a service, not a product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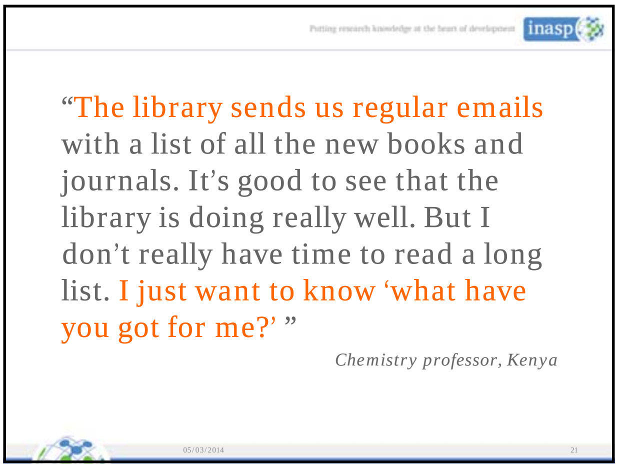
4. Identify different value propositions for different groups
CURRY
http://www.flickr.com/photos/steamdave/


inasp
"The library sends us regular emails with a list of all the new books and journals. It's good to see that the library is doing really well. But I don't really have time to read a long list. I just want to know 'what have you got for me?' "
Chemistry professor, Kenya
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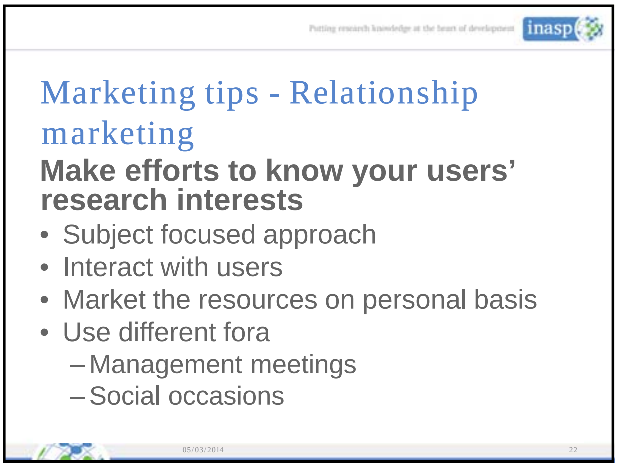
inasp
Marketing tips - Relationship marketing
Make efforts to know your users' research interests
• Subject focused approach
• Interact with users
• Market the resources on personal basis
• Use different fora
– Management meetings
– Social occasions
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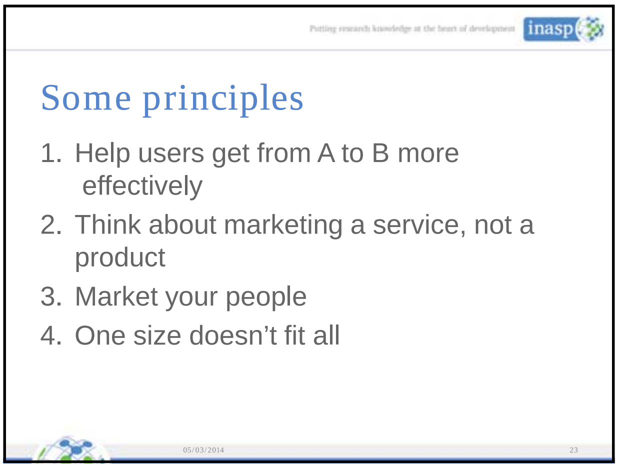
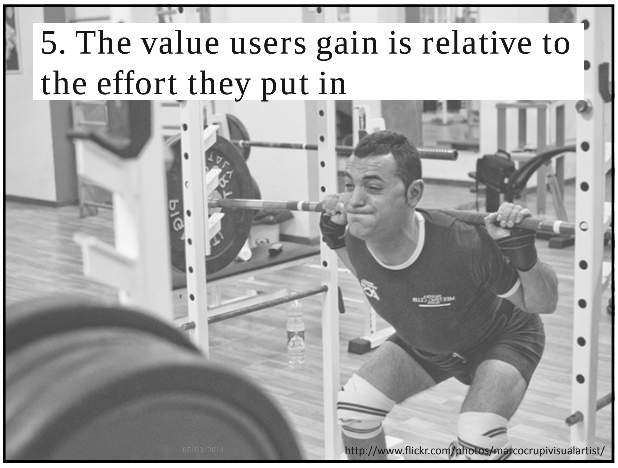
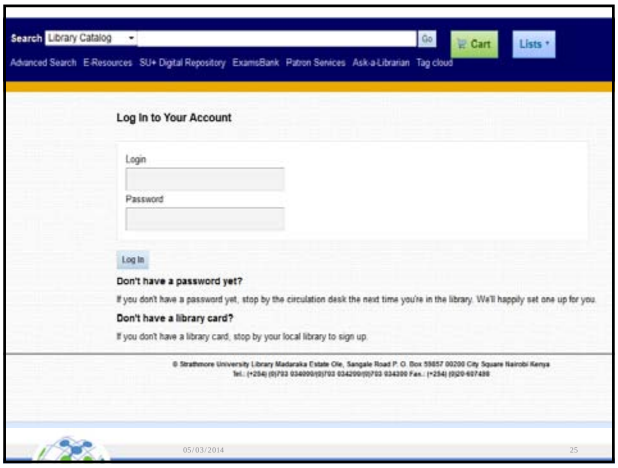

inasp
Some principles
1. Help users get from A to B more effectively
2. Think about marketing a service, not a product
3. Market your people
4. One size doesn't fit all
05/03/2014
23


5. The value users gain is relative to the effort they put in
http://www.flickr.com/photos/marcocrupivisualartist/



Some principles

1. Help users get from A to B more effectively
2. Think about marketing a service, not a product
3. Market your people
4. One size doesn't fit all
5. Even free e-resources have a cost

… and finally…

Communicating your message

Five basic rules of ALL forms of communication

- Knowing your own purpose - what are the main ideas you want to get across?
- Know what the audience wants and expects from your communication
- Be clear, be simple
- Prepare thoroughly
- Add polish - rehearse talks, polish pieces of written communication

How well do you know your users?

"The library sends us regular emails with a list of all the new books and journals. It's good to see that the library is doing really well. But I don't really have time to read a long list. I just want to know 'what have you got for me?' "

Chemistry professor, Kenya

2.5.2 Knowing your users

- How would you meet the chemistry professor's request?
- How can you show him / her what you've got which will meet his or her research needs?
- What would you need to know first?
- What kind of approach would work?
- What are the key point you need to make to him?

Some possible approaches

- A subject / faculty / college librarian's blog?
- A subject or faculty newsletter?
- Putting a presentation together and making it available online
- Recording a short video and uploading it to YouTube
- Open days and events
- Approaches to individual academics

Putting it into practice

Being successful
Being strategic
Doing the right things at the right time
Having the greatest impact
Thinking about the resources you need

These all depend on

planning

Developing a marketing plan

- Start small
  - and grow from there as you learn
- Plan well
  - identify strengths and weaknesses, as well as opportunities
  - perhaps a single department
  - identify some 'quick wins' – don't pick the most difficult department to start with

Strengths

Could be a librarian with particularly good subject knowledge

a good website

Library represented on academic board

Weaknesses

A specific publisher's collection isn't available

eg – you don't have access to Wiley Online Library

Opportunities

Are there new courses being developed?

Is there an event you could build on? e.g. OA week…

Is there a lecturer who is already an enthusiastic user of e-resources?

Threats

Is your internet connection unreliable?

Something that could put new users off or frustrate them

Your IT Department is not library focused

Planning is also the basis for

monitoring

(that was a monitor lizard)

And if you have a plan,
that you can monitor,
you can make the necessary

adjustments

As you see what's working and
what's not

Strategies to measure impact

- Gather statistics
- Give users the opportunity to feedback
  - Face to face, in print or online

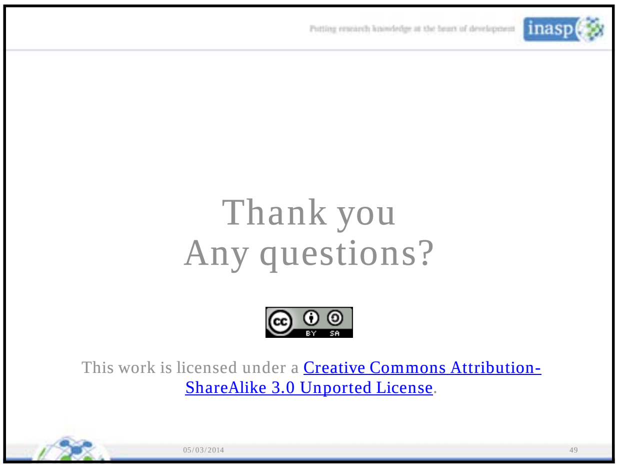
  …and keep a record of that feedback
- Take photos of activities

Why we need to market e-resources

In one year….	
Students intake	15,000
Academic and research staff	769
Total downloads	26,008
Total journals available	27,431
Total paid	$29,008
Average downloads per journal	0.94
Average downloads per user	1.65
Average cost per download	$0.90

Reflections on the day

- What have you learned today?
- What actions will you take when you return to your library?


Putting research knowledge at the heart of development
inasp
Thank you
Any questions?
This work is licensed under a Creative Commons Attribution-ShareAlike 3.0 Unported License.
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Day 2 Management of electronic resources

Unit 2.5: *Marketing e-resources*

Exercise 2.5.1 Why market e-resources

Work in: Groups of 4-5

Time: 10 minutes

Please write each reason on a separate post it and be prepared to report back to the plenary session after discussion

Take a moment to think on your own then discuss with your neighbour

Identify as many reasons as possible why a library should market e-resources.

Why is this the librarian's responsibility?

Who should you market resources to?

Day 2 Management of electronic resources

Unit 2.5: *Marketing e-resources*

Exercise 2.5.2 Knowing your users

Work in: Groups of 4-5

Time: 20 minutes

Please be prepared to report back to the plenary session after discussion

A Chemistry professor in a university in Kenya commented “The library sends us regular emails with a list of all the new books and journals. It’s good to see that the library is doing really well. But I don’t really have time to read a long list. I just want to know ‘what have you got for me?’ ”

- How would you meet the chemistry professor’s request?
- How can you show him / her what you’ve got which will meet his or her research needs?
- What would you need to know first?
- What kind of approach would work? How do you build a relationship with him? How would you provide the information to him?
- What are the key points you need to make to him?

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Introduction to electronic resources management

Day Three : Training others to use electronic resources

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Introduction to electronic resources management

Unit 3.1: Training for e-resource use

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Objectives

We will consider:

- Who should know about e-resources
- What they need to know
- Best practice in training methods, both one-to-one and groups

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Reminder

- **Workshop expectations**
- Follow-on training to share learning with colleagues should be held at each institution represented within 6 months of the workshop.

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3.1.1. Exercise – Training – who, what and how?

Consider the units we have discussed in this workshop

- Who should we tell?
- What are the key points they need to know?
- What is the best way to tell them?

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Unit 1.1 Introduction to e-resources

Definition of an e-resource

Types of resource

Benefits of using e-resources

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Benefits of using e-resources

- Who – library staff; students; academics; researchers; institutional administration
- What – Researchers need to know they are up to date and easy to access; Administrators need to know they are cost effective
- How – Researchers – individual discussion, printed materials, email, group training

Summary

- Who – not just students!
- What – target the message to user needs
- How – group instruction, individual instruction, "bulletin" style materials

Thank you
Any questions?

Day 3 Training others to use electronic resources

Unit 3.1: Training for e-resource use

Exercise 3.1.1 Training expectations

Work in: Groups of 4 -5

Time: 45 minutes

Please be prepared to report back to the plenary session after discussion

The expectation from this workshop is that “Follow-on training to share learning with colleagues should be held at each institution represented within 6 months of the workshop.” Each participant will be required to submit a report about this training to the consortium.

In preparation for the follow on training, this exercise will help with identify who should be trained and what might be included in this training.

Consider the units we have discussed in this workshop

- Who should we tell?
- What are the key points the need to know?
- What is the best way to tell them?

Introduction to electronic resources management

Unit 3.2: Planning for training

Learning objectives

- Describe the key aspects of successful participant identification
- List the key aspects of the training needs assessment process
- Describe the process of creating SMART learning objectives
- Identify key stages of the content development process
- Identify key stages of the draft programme development process
- Describe costs and logistical considerations of the planning phase

Important questions

- Certain questions **must** be asked before starting any training planning
  - Who needs training?
  - What are their training needs?
- When these are answered then we need to…
  - Develop learning objectives to meet these needs
  - Outlining the training event content
  - Draft the training programme
  - Consider costs and early logistical issues

Characteristics of effective training events

- Group discussion
- Time available
  - 5 minutes individual reflection
  - 15 minutes discussions
  - 15 minutes report back

3.2.1. Exercise - Successful training

Individual reflection on successful training

- What was the goal of the training activity?
- Who were the participants?
- What activities were undertaken (for example: presentations, demonstrations, exercises, discussions)
- What do you feel worked?
- What do you feel did not work?
- What were the main achievements?

Group discussion

- With reference to your personal reflection, list:
  - 5 common features of successful events
  - 5 features which characterised less successful events

Successful training

- Focussed
- Adequate people to carry out training
- Staff have skills in training
- Good access to e-resources for demonstrations
- But has a back up plan
- Interest by users – demand for training
- Well planned training events

Poor quality training

- Content not relevant to group
- Trainer lacked skills
- Demonstrations failed
- Boring
- Badly planned
- Participants are distracted
- Group is too large

Five basic rules of ALL forms of communication

- Knowing your own purpose - what are the main ideas you want to get across?
- Know what the audience wants and expects from your communication
- Be clear, be simple
- Prepare thoroughly
- Add polish - rehearse talks, polish pieces of written communication

Identifying participants

- Why is it important?
  - Training the wrong people is not efficient
  - The “right” people will optimise any impact
- What change are we trying to achieve?
  - Who are the most effective actors of that change or to help achieve that change?
  - Should we work with enablers of the desired change or targets of the change?
  - Target different people during different phases of change?

Training needs assessment

- Step 1: Training in what area?
  - Performance needs assessment (PNA)
    - What is the person/group expected to do?
    - How well do they currently “perform”?
    - If the difference between the two above is due to a deficiency of knowledge or skills, then training in these areas is the appropriate intervention
- Step 2: Gather background information
  - About the trainees
    - Profile and relevant background
    - Current level of knowledge and skills

Approaches to needs assessment

- Designing a needs assessment strategy
- Needs assessment tools
  - Existing documentation, talking to target trainees, questionnaires, skills profiles, observation, etc.
- Analysing needs assessments
  - What people say and what they do are often different
  - Over/under expectations
  - Beware of unrepresentative subjects and sample correctly

3.2.2 Identifying participants

- *Identifying target users of e-resources*
- *Identifying target users of **training** on e-resources*

SMART Learning objectives

- Learning objectives – what are they?
  - Knowledge, skills, attitudes (KSAs) that the learner will know or be able to do after the training
- Should be SMART – consider:
  - What is the behaviour of the learner that will be changed? Select an appropriate verb to describe this
  - Under what conditions must the task be performed?
  - Determine to what standards the task must be performed
- The difficulty of making things SMART

Focus

- Consider what participants:
  - must know
  - should know
  - could know

Content outline

- Develop the content outline that matches the learning objectives
- Draft outlines and iterative developments
  - Check that the content outline meets participants expectations and requirements
  - Consultation and iterative development
  - Never develop things in isolation
- Always map the content outline onto the outcomes of the needs assessment and learning objectives

Draft programme development

- Content outline feeds into the draft programme
- How can the content be put together in the most effective way
  - Remember adult learning principles, available resources, opportunities and constraints, etc.
  - Theory, ideals, practicalities and realities
- Write learning objectives for individual sessions
  - If they don't match the overall objectives then should the session be included?

Costs and logistics

- Resource availability, costs and logistics are essential considerations
  - Venue requirements and availability
  - Invitations and the invitation process
  - Technology and resource requirements
  - Refreshments and lunches (v. important!)
  - Administrative support
- Early planning in all areas
- Flexibility is important – not everything needs to be perfect to achieve the desired objectives
- Implications for budget and logistical support

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Summary

- Effective planning is essential for successful training activities
- There are key stages to planning training that **must** be undertaken
  - Identifying training participants, assessing their needs and designing training that matches the two
- Effective planning can save time and money later in the training process
- Experience helps makes planning more effective and easier to undertake

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But…..

- How will this work in my library?

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3.2.3 Using opportunities

- Planning in advance enables us to be ready to use opportunities as they come up

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Thank you
Any questions?

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Day 3 Training others to use electronic resources

Unit 3.2: Planning for training

Exercise 3.2.1. Part A Individual reflection on successful training

Work: Individually

Time: 5 minutes review of pre-workshop activity 0.3.2.1.

Consider a training event you either delivered or attended which felt successful:

- What was the goal of the training activity?
- Who were the participants?
- What activities were undertaken (for example: presentations, demonstrations, exercises, discussions)
- What do you feel worked?
- What do you feel did not work?
- What were the main achievements?

Exercise 3.2.1 Part B Characteristics of successful training

Work in: Groups of 4 -5

Time: 15 minutes

Please be prepared to report back to the plenary session after discussion

With reference to the personal reflections of all the group members, list:

- 5 (or more) common features of successful events
- 5 (or more) features which characterised less successful events

Day 3 Training others to use electronic resources

Unit 3.2: Planning for training

Work in: Groups of 4 -5

Time: 15 minutes - this is just a “taster” session, you can apply these questions to your own institution after the workshop.

Please be prepared to report back to the plenary session after discussion on Part B question 2 and 3 only.

Exercise 3.2.2 Part A Identifying target users of e-resources

Questions for discussion

1. Who is using e-resources within your institution?

2. Is there any other group that should be using e-resources, but is not? Please list the groups and explain why, in your opinion, they are not using e-resources.

3. Among all the user groups you identified in the previous questions, who would benefit the most from using them? Please rank them from the one that you think will benefit the most to the one that you think will benefit the least.

4. Which parts of your institution do these people belong to? Please list all the groups again indicating which part of your institution they belong to next to each group.

5. Among all the user groups you identified, who are the most important ones for the library to provide a high level of service to this area?

*Exercise 3.2.2 Part B Identifying target users of **training** on e-resources*

Questions for discussion

1. Among all the groups identified in Part A, who are the direct users and who could act as enabler (i.e. help direct users to improve the way they use e-resources)?

2. What would be the advantages of training direct users? What would be the disadvantages?

3. What would be the advantages of training enablers? What would be the disadvantages?

4. In an ideal world, in what order would you need to train each target groups (both direct users and enablers) to achieve the best results. How did you decide who would you train first? How did you decide who would you train last? Are there any groups you would train together?

5. In practice, are there any obstacles to the planning you outlined above? Please include any practical considerations such as start/end of the academic year, etc.

6. At what level do you think you will need to train each group? (Awareness level*, Working knowledge level**, Skill level***, Mastery level****)

Day 3 Training others to use electronic resources

Unit 3.2: Planning for training

Exercise 3.2.3: Using opportunities

Work in: Groups of 4 -5

Time: 15 minutes

Please be prepared to report back to the plenary session after discussion

Each group will have a different scenario, so should prepare flipcharts for display.

The facilitator will allocate a different scenario to each group, please focus on the scenario you have been allocated.

Librarians should always be prepared to take any opportunities to share their knowledge about the use of electronic resources. This exercise will help you think about possible scenarios and how you could be prepared. Note: the points for consideration are the same for all the scenarios in this discussion, part of the discussion might be around whether they are relevant for your scenario.

Group A

A lecturer in the geography department has just phoned you and said that he has been called away from his first year class for half an hour. Could he send them to the library and would you give them some instruction in e-resources? The class of 25 will be with you in one hour's time. As far as you know, they have had a tour of the library but no instruction in e-resources.

How would you make the most of this opportunity?

You might want to consider:

- What are the 5 main points you would want to make to them?
- How would you keep their attention?
- What activities or discussion could you involve them in?
- What are the strengths, weaknesses, opportunities and threats for this scenario?

Remember to consider what participants:

- must know;
- should know;
- could know.

It is better to spend time on the "must know", clarifying the participants' understanding, giving them time to practice and reflect, than to cover too much ground with the 'should' or 'could' know.

Group B

As part of the induction process for students, you have been requested to run a one hour induction session for a group of 150 students from the history department. You will be meeting with this group at 11:30am, after which they have a lunch break. You have had a month to prepare for this.

How would you make the most of this opportunity?

You might want to consider:

- What are the 5 main points you would want to make to them?
- How would you keep their attention?
- What activities or discussion could you involve them in?
- What are the strengths, weaknesses, opportunities and threats for this scenario?

Remember to consider what participants:

- must know;
- should know;
- could know.

It is better to spend time on the “must know”, clarifying the participants' understanding, giving them time to practice and reflect, than to cover too much ground with the 'should' or 'could' know.

Group C

A lady walks into the library and introduces herself as being newly appointed into the Agriculture department. She is very chatty and tells you she is very keen to research further in her field (soil science). She has used libraries while studying and has valued what they have been able to offer her so has used her first free break to come and meet you.

How would you make the most of this opportunity?

You might want to consider:

- What are the 5 main points you would want to make to her?
- How would you keep her attention? **You have her attention, you need to be sure she is listening to you (she is chatty)**
- How would you try to lead the discussion?
- What are the strengths, weaknesses, opportunities and threats for this scenario?

Remember to consider what participants:

- must know;
- should know;
- could know.

It is better to spend time on the “must know”, clarifying the participants' understanding, giving them time to practice and reflect, than to cover too much ground with the 'should' or 'could' know.

Group D

There are a group of three, second year medical year students, who you have seen around the library before, standing near the computers. They seem to be urging each other to use the computer, but all seem a bit reluctant to sit down. You move closer to hear their conversation and realise they are trying to find out about the side effects of a specific medication and think that there should be something “on the computer”.

How would you make the most of this opportunity?

You might want to consider:

- What are the 5 main points you would want to make to them?
- How would you keep their attention?
- What activities or discussion could you involve them in?
- What are the strengths, weaknesses, opportunities and threats for this scenario?

Remember to consider what participants:

- must know;

- should know;
- could know.

It is better to spend time on the “must know”, clarifying the participants' understanding, giving them time to practice and reflect, than to cover too much ground with the 'should' or 'could' know.

Group E

The Deputy Vice Chancellor has arranged to bring the Minister for Higher Education into the library to see the new building work which has been done and all library staff have been notified of this visit. As they are walking past your desk, the Minister catches your eye and asks you what your job is. The DVC appears to be listening intently to your answer.

How would you make the most of this opportunity?

You might want to consider:

- What are the 5 main points you would want to make to them?
- How would you keep their attention?
- What activities or discussion could you involve them in?
- What are the strengths, weaknesses, opportunities and threats for this scenario?

Remember to consider what participants:

- must know;
- should know;
- could know.

It is better to spend time on the “must know”, clarifying the participants' understanding, giving them time to practice and reflect, than to cover too much ground with the 'should' or 'could' know.

Using Basic Facilitation Skills

Overview

Today's organizations use meetings to share ideas, make joint decisions, and plan actions. Issues are often complex, and the pressure to produce results is great. The effectiveness of a meeting or training depends upon the facilitator. This sessions provides the skills facilitators need to lead effective, results-oriented meetings.

Session Objectives

At the end of this lesson, you will be able to describe how using basic facilitation skills contributes to training and meeting effectiveness.

- Describe how using The Basic principles in meetings creates an environment that fosters productive and efficient meetings.
- Describe the planning involved in preparing a team for a focused training.
- Successfully start a meeting by reviewing the purpose, desired outcomes, ground rules, and agenda.
- Explain the difference between meeting process and meeting content
- Demonstrate how to keep the discussion on track while maintaining an appropriate meeting pace.
- Demonstrate how to assign action items and make follow-up plans to conclude your training.
- Explain how to evaluate a meeting.
- Encourage diverse points of view.
- Keep the group focused and moving.
- Make sure action items are planned.
- Demonstrate techniques for handling disruptive behavior.

The Basic Principles

- Focus on the situation, issue, or behavior, not on the person.
- Maintain the self-confidence and self-esteem of others.
- Maintain constructive relationships.
- Take the initiative to make things better.
- Lead by example.

Establish a Comfortable Learning Environment

1. Ground Rules should be established and upheld. Ground rules help encourage the development of positive group behaviors and help limit negative ones. Ask the participants what ground rules they would like to see established and then add your own. Be sure to ask for participant commitment to the ground rules. (ex. "What are some ground rules that would help you get the most out of our time together? Can we all agree to these ground rules? Would any of these ground rules be difficult to uphold?)

Examples of Ground rules:

- Enter into the discussion enthusiastically
- Give freely of your experience
- Keep confidences and assume others will.
- Follow The Basic Principles
- Confine your discussion to the topic.
- Appreciate the other person's point of view.

2. Show interest. Send the message that you are interested in what participants have to say, the experiences they bring, and the issues they face in the organization. You can do this by maintaining eye contact, smiling, moving towards participants, and nodding your head.

3. Listen for content and feelings. Actively listen for the emotion behind the worlds as well as the message between the lines. Respond to both.

4. Look for nonverbal cues. Fidgeting, avoiding eye contact, sighing, pulling on a sweater, or leaving and entering are examples of cues that participants are uncomfortable with something (the room temperature, the subject matter, outside issues).

5. Use humor as appropriate. Humor, appropriately used, can often put participants at ease and set the stage for a fun and interactive session. Be cautious of making humor your main "style of communication" as it may detract from the seriousness of the message. In addition, be aware that jokes may offend participants in ways that are not readily obvious.

6. Control distractors. Distractors can include environmental (uncomfortable room temperature, noise from the next room, poor lighting) or personal (jingling change, tapping pencils, shuffling papers, playing with jewelry) disturbances. It is the responsibility of the facilitator to identify and correct any distractor that may hinder the learning experience. (ex: It seems to be getting a little cold in here. How does the temperature feel to the group?")

7. Maintain eye contact with participants. Use your eyes to let people know you are interested and pick up cues to how the participants are reacting. Maintain 80% eye contact. Avoid rapid, sweeping head movements. If you need to use your Instructor's Unit Guide, glance at the guide and then re-establish eye contact before speaking.

8. Link to organizational issues and other training. Generate participant interest in the topic by making it relevant to what's currently going on in the organization, what they are currently learning, or what is going to be covered in other training sessions. (ex: "How is the example we just discussed similar to what we are experiencing within the Libraries?" "The skills we'll cover today go hand-in-hand with those you learned last week."

Develop Participation

1. **Keep air time under 40%** Resist the temptation to lecture or be the expert. By deferring questions back to the group and using a variety of techniques for developing participation, you can encourage participants to do at least 60% of the talking.

2. **Ask open-ended questions.** These questions are used when you want to gain more information. Open-ended questions usually can't be answered with just a "yes" or "no." They usually start with "what," "how," "tell me about," or "explain." (ex: "What does quality mean to you?" "How would you implement that idea?" "What do you think the effect would be if…")

3. **Count to 10.** Wait a full 10 seconds after asking your questions (counting one, one thousand; two, one thousand). If there is no response, rephrase or ask your question again.

4. **Use polling.** This technique enables you to test assumptions about your group and get people interested in your topic. Polling can bring out otherwise silent people or equalize the overly talkative participant. Used together with asking an open-ended question, it can increase participation easily. (ex: "Let's see a show of hands from those of you who have used problem-solving skills," or "How many here have been to a facilitation skills seminar?")

5. **Call on someone by name.** Select someone who looks like they might know the answer. Otherwise, this technique can embarrass or make people uneasy. Use the name first, then follow with the question or request. (ex: "Tell me, Kim, how do you accomplish your goal setting?" "Eduardo, how many PCs does your group own?").

6. **Give verbal reinforcement.** Reinforce participation and involvement rather than the content of the response. (ex: "Thank you," "I'm pleased you brought that up.")

7. **Give nonverbal reinforcement.** Show your participants you're pleased with what's going on or what has been said. (ex: Smile, nod, "thumbs up," write their ideas on the flipchart word-for-word, or walk toward the group.).

8. **Use networking.** Get participants to talk to each other rather than have them interact only with you. (ex: "Take a few minutes and ask the person next to you how they use that process in their department." "Michelle, you've dealt with that issue before. Which Key Actions should Tom be especially careful to cover?")

9. **Defer to the group.** Rather than answering questions yourself, let the group bring its expertise to the situation. (ex: "What about it group?" What are your thoughts and opinions about which approach we should choose?")

10. **Provide examples.** Whether a personal experience or an example drawn from another, examples can provide a visual illustration of a question or concept you are presenting. Be aware of maintaining confidentialities if you are sharing an example based on someone else's

experience. (ex: "I once faced a situation as a supervisor that I needed coaching on, but I didn't get it. This is what happened….")

Give Clear and Concise Instructions

1. Use simple sentences. Keep your delivery straightforward and uncomplicated. Phrase things in the easiest way possible.

2. Give step-by-step instructions. Help your participants master the material by telling them where you are going and why you are going there. Providing clear, distinct and logical instructions can help ensure positive results. (ex: "Read page 10. Then fill out pages 12 and 14. I'll give you 15 minutes to complete this exercise.")

3. Make smooth transitions. Help participants understand how one learning activity or idea is linked to another by using clear transitions to make the connections for them. (ex: "We've just finished discussing why it's so important for a manager to recognize an employee's efforts. now we're going to discuss how to do that.")

4. Speak clearly and audibly. Use your voice to its advantage. Project your voice a little beyond your participants. Speak in a manner that can be easily heard and plainly understood.

5. Use visual aids effectively. Enhance material, if appropriate, with additional flipcharts, posters or other props that graphically reinforce understanding and learning. Be careful not to over-do the visual aids so as to distract from the participants' learning.

6. Check for understanding. This technique gives the speaker an opportunity to clarify points. Let your participants know you're interested in them and in whether or not they understand. (ex: "Who would like to summarize their understanding of the exercise we're about to do?")

7. Ask participants to summarize. Have your participants share in the responsibility of summarizing what you've just covered and check their comprehension at the same time. (ex: "We've spent a lot of time discussing….What are some of the major points to remember?")

Manage Over Participation

1. Refer to ground rules. If you have established ground rules and participants have agreed to uphold the ground rules, you can now use them to encourage the kind of participation needed.

2. Ask closed-ended questions. Begin your questions with phrases that solicit only a yes or no, or a one-word response. *Do you*, *can you*, and *have you* are examples of closed-ended questions. (ex: "Do you plan to set requirements with your future customers?" "Can you tell me how many of you are members of a process improvement team?").

3. Ask for link to topic. Get the group or participant to bring themselves back on target. (ex: "Chuck, how does the situation you just described fit into the step we are discussing?")

4. Use reflecting statements. "Reflecting" is a form of paraphrasing, using some of the speaker's own words and eliminating the normal preamble to paraphrasing, e.g., "If I'm hearing your correctly," or "So, what you're saying is…" This creates a "mirror" of feedback that tells the speaker, "I understand you." This forces you to listen intently, since you know you will have to repeat back what was said.

Example: If an over participant says, "This has been a really frustrating year with all the turnover because of the mistrust and animosity among our employees, which everybody knows we can't do anything about…And besides that, with most of our customers cutting back on orders, we'll probably have layoffs and all that…and on top of that, I'm working seven days a week trying to pick up the slack…"

Respond by reflecting and making a link to the topic at hand: "Turnover and possible layoffs are causing poor morale and you're frustrated because you're working seven days a week and don't see any end in sight. Everything you've mentioned makes this session, "Positive Responses to Negative Situations' even more important. So let's take a look at the Key Actions.

5. Ask others for opinions. Tactfully refocusing attention away from an over participant, Direct open-ended questions at the group or another individual. This can accomplish two things if done effectively: manage an over participant and develop additional participation. (ex: "Thanks, Bob. How does everyone else feel about this issue?").

6. Summarize and move on. Transitions are important. A quick summary of material signals an intent to continue. Let participants know you've completed your material by capturing key points and introducing the next ones. (ex: "We've just completed our prework discussion of…Now let's apply that information to next topic of..").

Deal with Aggressive Behavior

1. Maintain a relaxed posture. Telegraph to the group that you are open. Keep your arms at your sides, smile, sit on a table, lean forward, or just let your "body language" create an open posture.

2. Remain nondefensive. Refrain from trying to personally defend the training, the organization's strategy or the feeling you need to be right.

3. Clarify and acknowledge. show the participants you really want to hear them by paraphrasing key statements, checking for understanding, and generally letting people know you can see their point of view.

4. Clearly state behavior change needed. Be specific about what behavior you want the participant to either stop or start as well as the impact of their current behavior. Give them the choice to act on your feedback.

5. Use a problem-solving approach. To avoid becoming part of the problem, move the focus to problems solving. (ex: "What are some other approaches that could be taken to solve this issue?"

6. Let the group help you deal with the problem. Give the group a chance to work out some of the issues. (ex: "Do you feel we've talked enough about defects in general? Is it time to move on?")

7. Ask to discuss problem privately. Call a break. Take a minute or two to stretch, and then catch the participant alone to address the concerns that are bothering you. In private, use a combination of the techniques listed here to resolve the issue.

8. Allow other person to save face. Acknowledge the other person's point of view and the value of their concerns.

Guidelines for Giving and Receiving Feedback

When giving feedback to others:

1. Be specific. Providing specific examples of what the other person did that was effective or not effective provides information the individual can act on, particularly if your observations are followed by specific alternatives. Avoid generalizations, absolute statements, and evaluative comments. (For example: "You provided a strong transition between the introduction and the video when you said…" versus "Great transitions!" or "When Rosie said, 'Our department uses the process a little differently, ' you did not acknowledge her comment," versus "You always forget to reinforce participation.")

2. Describe your own reaction to the behavior. Most people benefit from seeing themselves from another's perspective. When you describe your reaction or the consequences of the observed behavior, the other person can better appreciate the impact his or her actions are having on others.

3. Suggest alternatives. Offering suggestions shows that your intent is constructive and genuine and that you have moved past your evaluations toward suggestions for improvement. Avoid directive advice: comments that begin with "you should" or "the real problem is" sound condescending. The other person often ignores or refutes such comments.

4. Describe in terms of "more of" or "less of." This technique points out the variability of behavior and encourages others to look at differences on a continuum form effective to less effective, depending on the circumstances surrounding the behavior.

5. Provide feedback as an equal. Seeking power or acceptance detracts from establishing a collaborative relationship. In a helping relationship, it's easy to slip into assuming a superior role.

6. Offer only what the other person is ready to hear. Accounting for the needs of the individual receiving the feedback focuses you on how the information will help him or her. Do not comments on behavior over which the individual has no control. This merely leads to frustration.

When receiving feedback from others:

1. Listen actively. Paraphrase the feedback in order to ensure that you've heard it correctly. This sends the message that you are listening and are open to feedback. (For example: "What you're saying is that when I talk fast, it appears as if I'm nervous and rushing through the material. You suggest that I take more deep breaths to slow myself down.").

2. Maintain eye contact. Encourage the other person to continue feedback by maintaining eye contact.

3. Use body language that shows interest. Maintain eye contact, lean forward, nod your head, smile, and take notes. Send the message that you are open to the feedback and any alternatives the other person may have.

4. Seek clarification. Make an effort to understand the perspective of the person providing the feedback. Ask for examples of observations as well as alternatives. If the person offers no alternatives, ask for them. (For example: "Julie, I want to make sure I understand you correctly. Could you give me an example of what I did that made it appear as if I did not agree with you?…How would you suggest I do it next time so I don't send that message?")

5. Remain nondefensive. Avoid defensive reactions or explanations for your performance.

6. Allow the speaker to finish. Avoid a "yes…but" response. Don't interrupt the speaker in order to rationalize your performance.

7. Take notes to capture feedback. Send the message that you value the feedback. Taking notes will also allow you to go back and identify the alternatives you can act on.

Giving Feedback to Learners

A Self-checklist

Do I...

— Establish and maintain a climate of trust in which learners welcome, even invite, my feedback?

— Make sure learners understand that I will provide feedback to them during review sessions - and how?

— (If video was used) Signal the learner to stop the tape, if not already done, when I see an event I want to discuss?

— Begin by inviting the learner's self-assessment?

— As much as possible, help learners make their own discoveries?

— Link my feedback to the agreed upon goals when possible?

— Focus on learners' behaviors and performances, rather than making judgments about them as people?

— Try to be as specific as possible, referring the learner to explicit events when possible?

— When possible, begin my feedback with positive observations?

— Avoid following my positive observations with "but..." and a negative observation?

— Give learners a language with which to reflect on their performance?

— When my feedback is subjective, label it as such?

— Avoid overloading learners with feedback?

— Demonstrate support for learners when providing feedback?

— Attend to both *what* I say and *how* I say it?

— Invite the learner's reaction to my feedback?

— Help learners turn negative feedback into constructive challenges?

— Encourage learners to invite my feedback and to let me know when it is difficult to hear my feedback?

— Provide follow-up to my feedback when appropriate?

— Take notes on the supervisory session to guide future encounters with the learner?

Giving Feedback to Peers

A Self-checklist for Learners

Did I...

— Find out what my colleague was trying to accomplish in the encounter I witnessed?

— Find out if there were any special issues our colleague wanted us to focus on in the review session?

— Invite my colleague's self-assessment before providing my

— Try to facilitate my colleague's own discoveries wherever possible

— Regard the review as a time to be helpful to my colleague, not to display my insights and expertise?

— In clinical situations, try to keep the provision of high-quality health care as an overriding concern?

— Check out my hypotheses about my colleague's behaviors before making pronouncements?

— Before giving feedback, think through how I would feel receiving these comments?

— Present feedback in nonjudgmental language?

— Try to be as specific as possible, referring my colleague to explicit events, when

— Focus on my colleague's behavior, rather than making judgments about him or her as a person?

— When my feedback was subjective, label it as such?

— Provide feedback on my colleague's strengths and accomplishments as well as weaknesses and errors?
— Avoid overloading my colleague with feedback?

— Demonstrate support for my colleague when providing feedback

— Help my colleague turn negative feedback into constructive

— Encourage my colleague to invite my feedback and to let me know when it is difficult to hear my feedback?

— Provide follow-up to my feedback when appropriate?

Where you can use Facilitation

- There will normally be a briefing meeting where the situation is discussed and a decision is made as to whether facilitation is the best approach to achieve the objectives.

- A meeting between the sponsor and the facilitator is held at which the two become acquainted and matters of confidentiality are decided. From here, the style of the program will depend on what has been negotiated and the outcomes that have been agreed.

- The facilitator questions the sponsor in depth and may give questionnaires to complete prior to the meeting. There may be some time spent with the facilitator interacting with the participants, watching the acted out management style so that this can be highlighted and worked with (and improved) in the facilitated meetings.

- The venue, and all administrative arrangements are completed by the executive after liaison with the facilitator, who will advise on optimum requirements.

- An agenda is agreed. Often it is best to keep this very vague but it is accepted that most commissioning executives have a need to know what will be covered in the time that they, and their colleagues, have committed to such a venture. It is a fact that a skilled facilitator will be very sensitive to issues as they are raised and often what appeared to be the correct problem to be 'solved', turns out to be a symptom of something deeper. The more flexibility the facilitator has, the more likely he or she will be able to help the group to deal with the *real* issues.

- The meeting (which can last from half a day to perhaps three days) takes place.

- Follow-up sessions are planned and carried out. Rome was not built (or changed!) in a day and in the same way, executives who look for quick-fix or short-term results will be disappointed! At the review sessions, learning is highlighted and acknowledged (both from successes and failures).

Effective Questions to Facilitate Discussion

The success of any discussion during a presentation, training program, or meeting depends on participation. An atmosphere of free exchange can be created only when participants see that a mutual sharing of opinions and ideas is welcome. The skillful use of questions will encourage discussion. The following examples provide some useful guidelines for generating discussion.

1. Ask for feelings and opinions
   - What is your reaction to.....?
   - How do you feel about.....?
   - What is your thinking on .....?
2. Paraphrase
   - Are you asking me to.....?
   - Let me see if I understand your position. Are you saying that.....?
3. Encourage participation
   - Carlos, how do you feel about this?
   - Mary, how would you answer John's question
4. Ask for a summary
   - A lot of good ideas have been presented here. Will someone please summarize the major points before we go on?
   - It is clear Jim does not agree. Jim, will you summarize your major objections?
5. Ask for clarification
   - I didn't understand that last comment. What would you do if.....?
   - It's still not clear to me. What do I do when.....?
6. Ask for examples
   - Dorothy, will you give some examples of what you mean?
   - Joe, can you expand on that? I'm not sure I understand.
7. Test for consensus
   - It seems that we have come to agreement on this issue. Let me ask for a show of hands on this.
   - Glenda, is that also your feeling
8. Initiate action
   - Frank, how would you suggest we proceed on this?
   - What do you think are the next steps?
9. Explore an idea in more detail
   - What are some other ways to approach this problem?
   - Are there other things we should consider
10. Do a quick survey
    - Let's see a show of hands. How many of you are for this proposal?
    - How does everybody feel about this? Let's start with Luis.
11. Share your feelings
    - I feel you are not giving Harry a chance to explain his position.
    - I'm confused. I'm not sure what you're asking.
12. Reflect what you think someone is feeling
    - George, I get the impression that you are not satisfied with my answer. Is that right?
    - Kim's comments tell me that she needs to ask some questions on this -- is that right, Kim?
13. Be supportive

- Let's give Tony a chance to tell it the way he sees it.
- Dave, you had your say. Now it's Barbara's turn. Give her a chance to explain.

14. Check targets or orientation
    - Are we asking the right question?
    - Are these the most important goals?
    - Is this the only way to get it done
15. Look into the future
    - If we did it this way, what is the worst thing that could happen?
    - If we run into problems, what's "Plan B"?

Retrieved from the web at: http://www.foxperformance.com/presentation3.html on 7/3/2000
Paul G. Fox

Introduction to electronic resources management

Unit 3.3: An overview of training and facilitation techniques

General principles

- Adult learners are volunteers
- They come with the intention of learning
- They come with experience
- They learn best when they are actively involved and when they can participate.
- They learn best when the training provides practical benefits for their own work.
- They usually have diverse backgrounds

Effective learning

- Effective learning is achieved by:
  - Involving participants
  - Allowing for reflection and different perspectives;
  - Integrating observations into theory
  - Application, experimentation and problem solving.

Facilitation

- Participants need to feel involved and important.
  - Relevant programme
  - Practical exercises
  - Treated with respect
  - Relate new materials to existing information and experiences.

Facilitation tips…

- Be friendly and encouraging
- Try to relieve anxieties
- Build on learner experiences
- Look for ways in which participants can measure their progress
- Vary your style
- Reinforce practice
- Limit lecturing to no more than 20 minutes, and then provide some stimulus to break the monotony

Facilitation tips…

- You are facilitating, not merely imparting knowledge.
- Find out what the participants needs are, and try to satisfy those needs.
- Be careful how you manage their emotional needs.
- Be explicit about your goals and what you can and cannot meet of their own expectations.

General objectives of the training

- Try to be clear about your general objectives in providing training.
- Are you trying to:
  - change behaviour?
  - persuade?
  - inform?
  - stimulate thought?
  - entertain?
  - motivate for action?
- You are probably going to do a bit of each. Reflect on this, and make sure you know how you will achieve your general objectives.

Sessions

- Many, short sessions
- Change activity every 20 minutes
- Provide a timetable - and stick to it
- But also be flexible.
- Mornings tend to be creative
- Afternoons tend to be sluggish

Sergeant major's rules

- First I tell them what I'm going to tell them
- Then I tell them
- Then I end by telling them what I've told them.

Breaking up sessions

- Buzz-groups
- Group discussions
- Varying styles of report back

Encouraging participation

- Your suggestions?

Encouraging participation

- Brainstorming
- Pooling experiences
- Role plays
- Case studies
- Games

Visual aids

- When you are preparing visual aids, remember that most people remember:
  - 10% of what they read
  - 20% of what they hear
  - 30% of what they see
  - 50% of what they see and hear
- Don’t merely repeat what is written on the slide

Visual aids continued…

- Keep them simple and clear
- Limit the words on any slide
- Give people time to read them
- Develop key points

You as a performer

- Training requires performance
  - Engage people's imagination and attention
  - Be sensitive to moods and needs.
- People see you at several levels
  - the words you use
  - the tone you use
  - your body language
  - your humour
  - the emotions you generate
- Exploit the way they see you

Key things to remember

- Make eye contact
- Look and sense moods of different people
- Smile, laugh, be animated
- Be enthusiastic about what you are saying
- Don't stand behind the desk or table
  - Walk around

Key things continued…

- Use gestures
- Don't be afraid of pauses
- Repeat key points
- Vary your tone and pitch of your voice.
- Act! - this is a performance.
- Speak clearly and project your voice.
- Don't be afraid of being nervous

Key things continued…

- Prepare but don’t memorise
- Think to yourself: 'Be gentle' and you'll be treated gently.
- Use opening session to get participants to speak about themselves
- Use 'We' rather than 'you'.

Getting involvement

- Your suggestions?

Getting involvement

- Try not to have all the answers, or to come up with examples.
- The idea is not to collect information, but rather to get people to build on their own experiences.
- Education is a process by which people gain an authority over their own experience.
- Your role, as a trainer, is to help them gain that authority.

More on involvement

- Direct questions gently at different people
- Use humour if you sense hostility
- Keep people participating and involved
- Try to include the quieter participants in discussion
- Don't allow anyone to dominate

After sessions

- Training is tiring
  - Try and find time to relax and unwind
  - Reflect on the session
  - Think about the next session and how you can learn from what you have just done.

After sessions continued…

- Ask participants for feedback
  - Which of your expectations and fears were met?
  - What did you find most useful?
  - What did you find least useful?
  - How could this be done better next time?
- Listen carefully to the answers

Practicalities of training sessions

Practical details

- What should one check for before running a training session?
- Your suggestions?

At the beginning

- Find out:
  - how many are attending
  - why they are attending
  - who sent them to the workshop
  - what are their hopes and expectations
  - what are their fears and constraints
  - what range of experience will they bring to the table
  - if they have any biases towards or against you or your organisation
  - what is their prior knowledge of the subject

The room

- Check it out beforehand
- Make sure you have all that you need
- Check out and deal with potential distractions
- Decide where you will stand and how you will move about
- Decide on the best seating plan
- Prepare the blackboards, charts, displays and screens. Make sure they will be visible to everyone
- Make sure you have plenty of paper, markers, etc

Seating arrangements

- The most common options are

Theatre style


Photo from www.iied.org

Circle of chairs


Photo from pixabay.com

Seating arrangements

- Other formats are:
  - hollow U-shape
  - banquet style
  - conference table
  - three tables arranged in a star
- Which is best for your purposes?

U shape

Boardroom / conference style

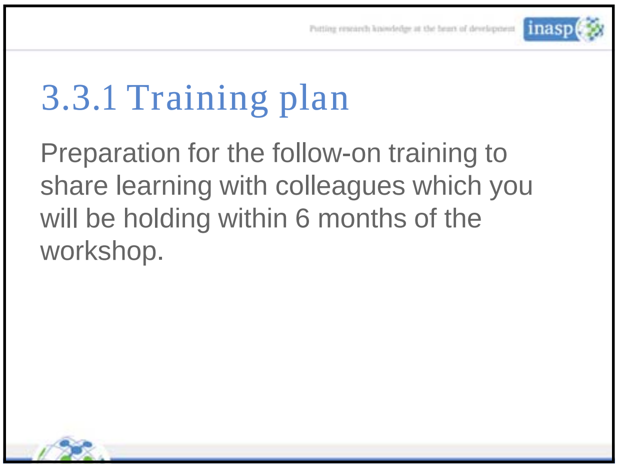
Banquet style

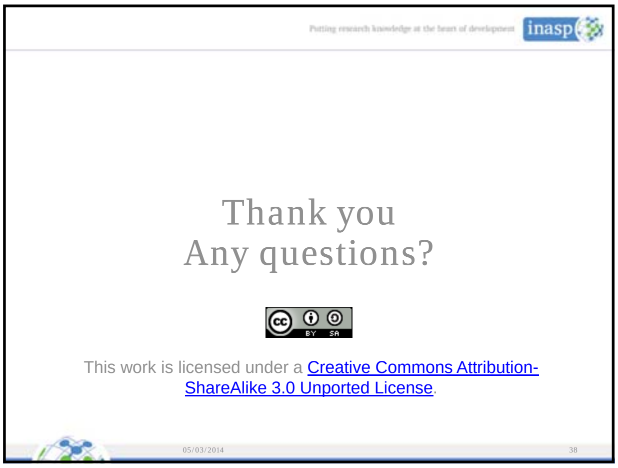
Check list

- Are you clear about overall training objectives?
- What are your specific training objectives?
- Have you reached agreement with co-trainers on roles, training objectives, programme and training styles?
- What are the main characteristics of likely participants?
- Have you worked out a timetable?
- Does each session include an introduction, main points and a summary?
- Have you planned to use a variety of learning methods?
- Are you clear about the five golden nuggets you want to impart?

Check list continued...

- How aware are you of your style, intonation and expression?
- What will you do to calm yourself before you start?
- Have you planned question and answer sessions?
- Are the room, facilities and arrangement of tables/chairs as you want them?
- Have you planned for changes in seating arrangements?
- Are all audio-visual materials ready?
- Are electrical supplies working? If not, what are your contingency plans?
- Have you planned time for evaluation?


Putting research knowledge at the heart of development
inasp
3.3.1 Training plan
Preparation for the follow-on training to share learning with colleagues which you will be holding within 6 months of the workshop.


Putting research knowledge at the heart of development
inasp
Thank you
Any questions?
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05/03/2014

Day 3 Training others to use electronic resources

Unit 3.3: Training techniques

Work in: Pairs from the same institution

Time: 15 minutes

Please be prepared to report back to the plenary session after discussion

Exercise 3.3.1 Training plan

Preparation for the follow-on training to share learning with colleagues which you will be holding within 6 months of the workshop.

Plan of action for future training at ________________________________ [name of your institution]

Objective(s) of the training.

Target groups for training (direct users and enablers), level of training needed, order of training (who is going to be trained first, last, and who needs to be trained at the same time)

Type of training and duration of training activities that you propose.

Outline of the training event content and learning objectives.

Risks and threats – what problems might you face?

Opportunities and allies – that might be available to help you in these activities?

Key stakeholders to be involved

Timescales and key deliverables

If you need anybody's approval or support before you start training in e-resources in your institution, who are they and how you will gain their support?

When will the training be delivered?

If you have time:

Start to plot out your message – as your own notes, as a printed leaflet, or as slides for a presentation.

Delivering Effective Presentations

People have to give presentations for many reasons. A lot of people find it makes them feel nervous. Even those who give presentations frequently can make a few small changes to increase their effectiveness. Presentations are useful when introducing a new topic, particularly when there is a large amount of theory that needs to be delivered. But when the topic is more practical, *practising* the new skill hands-on is likely to be the most effective method.

Audience
Who will you be talking to?
How many people will be there?
Do they know something about the topic already?

People often feel relaxed when they are speaking to a small group of people (e.g. 4 or 5) but feel nervous when speaking to a larger group (e.g. 20). Remember that a group of 20 is just 4 or 5 small groups. Thinking of it like this may help you feel more relaxed.

It is important to think about the audience's background as this can affect the kind of language you use. For example, if you are speaking to people with no background in technical areas, you should avoid using technical language.

Using your voice

There are several things to remember about the way you speak when delivering a presentation.

- Be clear: pronounce each word clearly. Try saying some tongue twisters to practise:
    - Lặt rau rồi luộc.
    - Nồi đồng nấu ốc, nồi đất nấu ếch.
    - Lúa nếp là lúa nếp làng, Lúa lên lớp lớp lòng nàng no nê.
- Speak slowly: when people are nervous, they often speak more quickly than usual. It is very difficult to follow someone when they are speaking quickly.
- Speak loudly enough: speaking loudly does not mean that you should shout - this can damage your voice. Instead, breathe deeply and speak out.
- Keep your head up: if you keep your head down, your throat is squashed and it is more difficult for your voice to get out. So keep your head up and your voice can get out more easily.
- Pause: try not to talk constantly. If you are using slides, allow people enough time to look at them and take them in. Pausing gives people the time to digest what you have said.
- Speak naturally: when we speak, our voices naturally rise and fall. The meaning of words can change depending on the way our voice sounds. Try and sound as natural as possible.

Body language

As well as using your voice effectively during presentations, it is important to consider unspoken aspects too. The way you use your hands, the way you stand, and how much you move, are all important when delivering a presentation effectively. Here are a few tips:

- Gestures: some people naturally use their hands when they talk. Using some gestures can make the presentation clearer. However, be careful not to wave your hands around too much as this can distract the audience from what you are saying.

- Eye contact: when we have a conversation with someone, we usually look at their eyes. If you are speaking to a large group, it may not be possible for you to look into everyone's eyes, but try to make eye contact with several people. Remember, you are talking to the people, not the room.
- Smile: if you smile at someone, they will usually smile back. Smiling will help you and the audience relax.

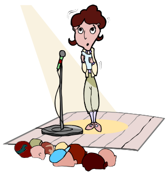
- Remove barriers: if you have some notes to refer to during the presentation, don't hold them high so that people cannot see your face. If possible, there should be no barriers between you and the audience.
- Movement: you should not remain fixed in one place throughout the presentation. However, do not spend the whole time walking backwards and forwards as this is distracting.
- Stance: again, the key here is to stand naturally and look professional. Don't put your hands in your pockets!

Visual aids

When using visual aids (e.g. objects, pictures or PowerPoint slides), remember the following:

- Size: the audience needs to be able to clearly see any visual aids you are using.
- Movement: if using PowerPoint, try not to use too many of the animation options. Too much movement distracts people from the content.
- Colours: as with animation, if there are too many colours, people are likely to find the presentation distracting. Using a few small, relevant pictures on slides is a good way of introducing some colour.
- Time: give the audience enough time to read the slide, or see the object or picture.
- Writing: keep text to a minimum on slides. There is no need for a slide to include everything you will say. A slide should have the main points on it, and then you can expand each point during the presentation.

Dealing with nerves



Feeling nervous before delivering a presentation is natural. In fact, many people would say it is a good thing as it increases the flow of adrenaline which helps you deal better with challenges. Even if feeling a little nervous is good, it is worth being aware of some techniques to make you feel a bit better.

- Preparing in advance is key as it gives you more time to practise and familiarise yourself with the content. Feeling more confident about what you are going to say is one way to reduce feelings of nervousness.
- If possible, arrive early and get used to the place where you will be speaking.
- Take a couple of deep breaths - this can help you to feel calmer.
- Don't be afraid of the audience. It is likely to be full of friendly people who want to hear what you are going to say.

And finally, remember that:

Communication is 7% verbal,
38% vocal,
and 55% visual.

(Chrissie Wright (ed), 'Communication Skills: A Practical Handbook', p.22)

Day 4 Using electronic resources

Unit 3.3: Presentations : hints and tips

Handout 3.3.3 Presentation skills further reading

Death by PowerPoint

by Alexei Kapterev, consultant at www.kapterev.com on Jul 31, 2007

Fighting death by PowerPoint... How to make a presentation and not to bore your audience to death.

http://www.slideshare.net/thecroaker/death-by-powerpoint

AuthorAID

The AuthorAID resource library has a large collection of resources on various topics in research communication.

http://www.authoraid.info/resource-library?-C=&subject=preparing_oral_presentations

Introduction to electronic resources management

Unit 3.4: Next steps

Expectations

- Follow-on training to share learning with colleagues should be held at each institution represented within 6 months of the workshop.
- Marketing resources in new ways
- Preparation of a printed or online “how to” handout/guide on search skills for a specific user group;
- Another appropriate, equivalent task which meets the needs of the consortium and the member institutions

Workshop – Day 1

- 1.1 Introduction to e-resources
- 1.2 E-resources available in country
- 1.3 Effective searching
- 1.4 Evaluation of resources

Workshop – Day 2

- 2.1 Access models
- 2.2 Acquisition and purchase
- 2.3 Managing access
- 2.4 Monitoring and evaluation
- 2.5 Marketing

Workshop – Day 3

- 3.1: Training for e-resource use
- 3.2: Planning for training
- 3.3: An overview of training and facilitation techniques

Why complete an action plan?

- Consortium has invested in you and your institution in offering training
- Good training and capacity building practice shows that training and professional development doesn’t just occur within the 3-4 days of the workshop.
- Follow on actions are essential to ensure participants are able to put skills, knowledge and ideas into practice and make a tangible, and timely contribution to improved services to users/institutions.
- Expect to spend 1-2 days on a follow on activity. This should be something you are doing as part of your everyday job

What you could achieve

- A printed or online “how to” handout/guide on search skills for a specific user group;
- The outline of electronic resource usage training activities planned and implemented in the institution
- Some examples of new ways you have marketed resources as a result – copies of leaflets, photos of marketing materials, copies of marketing blog posts
- Or another appropriate, equivalent task which meets the needs of the consortium and the member institutions.

Consider

- Which of these activities best suits the needs of my institution and consortium?
- What support would I need from my manager and is he/she likely to give this?
- How would I be able to demonstrate that I have successfully completed an agreed action?

3.4.1 Action plan template

- Spend 20 minutes working alone or with a colleague from the same institution considering your action plan
- If possible, type this and email it to the administrator
- Be prepared to discuss in plenary

Workshop evaluation and closing

- Follow up – what, when who?
- Evaluation forms https://www.surveymonkey.com/s/FbackForm
- Post workshop assessment https://www.surveymonkey.com/s/Post-IntroERM Complete within one week

Thank you
Any questions?

Introduction to electronic resources management

Module 3: Training others to use electronic resources

Unit 3.4: Next steps and action plan

Exercise 3.41: Follow on action planning

Work in: Work with a colleague from your own institution if possible. If you are the only representative of your institution, please work alone.

Time: 20 minutes, following plenary discussion.

The most important part of this exercise will be carried out when you return to work and implement your agreed actions. Please assume you will need to spend time on this, in your workplace, after the workshop.

As a condition of your institution's participation in future workshops, you need to carry out the actions within 6 months and share a completed copy of this form with the Facilitator and Administrator of this workshop. The Facilitator will provide group feedback to all participants after reviewing the action plans.

Please be prepared to share some thoughts and progress on these activities with the other workshop participants.

Instructions

Spend some time thinking about the follow on activities which are possible after this workshop as discussed in the plenary session. You should elect to do at least **ONE** of the below.

Decide what follow on activities you can commit to do. These need to be appropriate to the workshop and meet the needs of the consortium as well as your own institution.

Complete the form below in as much detail as possible. At the end of this session, please give the form to the workshop administrator, who will make a copy of the form and return it to you. If possible, complete the form electronically and email it to the workshop administrator and facilitator. Download Word version at http://www.inasp.info/en/training-resources/courses/courses/116/

Participant's name(s): ……………………………………………………………………………

Email address: ……………………………………………………………………………………..

Institution: ………………………………………………………………………………………..

Date: ……………………………………………………………………………………………

Deadline for submitting the follow on tasks (as agreed by all participants, normally 3-6 months after end of workshop, no longer than 6 months after workshop):

………………………………………………………………..

Putting research knowledge at the heart of development

Appropriate task	Who is responsible for completing this task (where there is more than one participant from the institution)	What will I/we do to accomplish the task You may need to break this down into steps towards completion.	What evidence will I/we collect	Progress achieved within 6 months	Evidence of progress
EXAMPLE (not from this workshop) Advocate for researchers to add content to the institutional repository	Solomon Head of Reader Services / Access	Develop key messages regarding advantages and benefits of an institutional repository for this stakeholder group Develop a presentation making the case for researchers submitting their papers Develop a user friendly, non-technical online submission form	Sample messages Presentation Evidence of steady growth of repository content		
A printed or online "how to" handout/guide on search skills for a specific user group;					

Appropriate task	Who is responsible for completing this task (where there is more than one participant from the institution)	What will I/we do to accomplish the task You may need to break this down into steps towards completion.	What evidence will I/we collect	Progress achieved within 6 months	Evidence of progress
The outline of electronic resource usage training activities planned and implemented in the institution					
Some examples of new ways you have marketed resources as a result – copies of leaflets, photos of marketing materials, copies of marketing blog posts					

Appropriate task	Who is responsible for completing this task (where there is more than one participant from the institution)	What will I/we do to accomplish the task You may need to break this down into steps towards completion.	What evidence will I/we collect	Progress achieved within 6 months	Evidence of progress
Describe another appropriate, equivalent task which meets the needs of the consortium and the member institutions					
Describe another appropriate, equivalent task which meets the needs of the consortium and the member institutions					

Pre and post workshop assessments

- Focus is on improving INASP training so answers are a reflection on the training materials NOT the facilitator or the participants
- It is different from the workshop evaluation which is about your experience of *this* workshop

Objectives and rationale of the assessment

- **For INASP**, to learn what worked, what did not, and how we can improve our offered training
- **For the participants** to reflect on what you learnt
- The questionnaire should be completed as part of the workshop or within 5 days of the end of the workshop
- Time required – 45 minutes

Post workshop assessment

- https://www.surveymonkey.com/s/Post-IntroERM