



# **DELIVER**

## **User Needs Analysis Report**

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## 1. Introduction

The User Needs Analysis (UNA) for the DELIVER project was carried out from October – December 2002. The main purpose of the UNA was to inform the technical developments of the project, and to highlight the institutional requirements for the project partners. The short timescale of the DELIVER project (October 2002 – July 2003) meant that UNA not only needed to be planned and carried out within a short timescale, but also needed to produce positive, insightful and directive results for the project team.

The initial proposal for the DELIVER project suggested that there would be three distinct development areas within the project:

1. Development of generic library tools within a VLE.
2. Development of subject-specific resource tools within a VLE.
3. Development of course-specific resource tools within a VLE, including resource lists linking to e-coursepacks and other e-resources.

The UNA process was loosely structured around these concepts, and appropriate stakeholders were consulted. The full UNA methodology is explained in section 2 of this report.

This report explains UNA processes carried out at both partner institutions and provides detailed reports focussed for specific stakeholders. Although each result report included in section 3 targets the issues and information needed by a target audience, all of the reports will be of interest to a wide range of institutions, vendors, and projects interested in VLE and library resource integration.

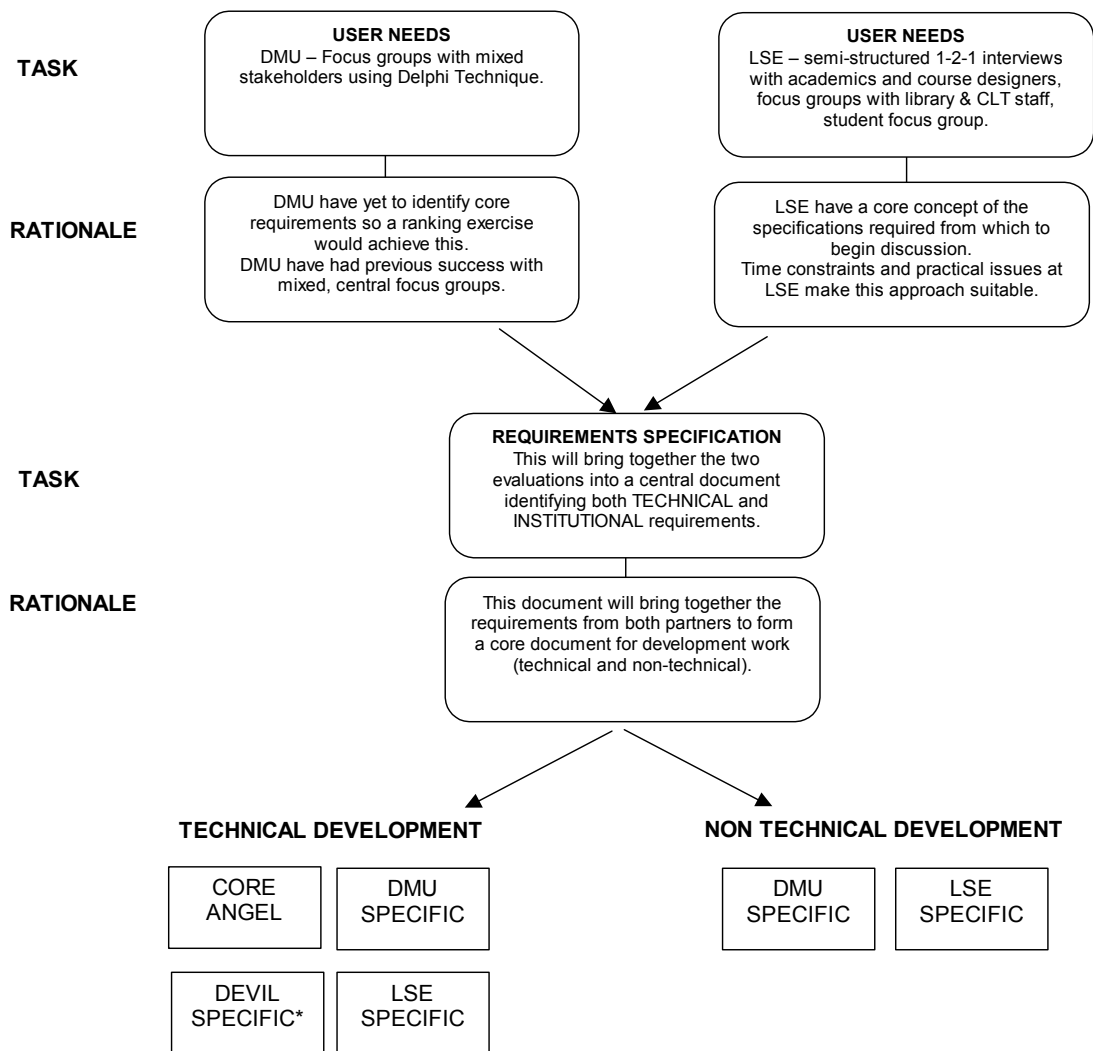
Various documents used throughout the UNA process have been included as appendices to support this report.



## 2. Methodology

It was important that the project obtained the best results possible from the initial interviews as the timescale of the project allows very little time for subsequent consultations. The DELIVER project specifically chose to second staff from current positions in order to take advantage of existing knowledge of user groups within the partner institutions. Jane Secker (LSE) and Mark Simpson (DMU) both have extensive user consultation experience within their home institutions and were able to quickly advise on the best methods of consultation to use in order to obtain relevant and useful results. It was accepted that this would lead to different methods being used at the two institutions.

The processes followed by the two institutions are outlined below. A workflow for the UNA was agreed by the institutions, as outlined in figure one.



**Figure one:** UNA workflow.

*\* Informed by requirements specification supplied by DEVIL project.*

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## 2.1 LSE Methodology

The team at LSE felt that it would be problematic to try and bring all stakeholders together into one group due to the commitments and time-constraints of both staff and students. It was also felt that certain stakeholders may feel intimidated or restricted within a large, mixed group and that these users may respond to questions more freely within small peer groups. To this end, the following strategy was adopted:

1. Academic staff and course designers were interviewed individually or in pairs with a focus on the work that had already been achieved within their specific courses.
2. Library staff were interviewed within two focus groups, one comprising Taught Course Support staff, and the other Information Services staff.
3. Students were interviewed in a focus group.
4. Staff from the Centre for Learning Technology (CLT) informally identified requirements in consultation with project staff.

All of the interviews were semi-structured, with a focus on the issues highlighted by the interviewees. Further supporting information was drawn from previous VLE student focus groups, help queries and evaluation surveys.

Academic staff and course designers (usually paid postgraduate students) were selected on the basis of current use of electronic library sources and online courses. The interviews investigated a range of issues concerning integration between WebCT and the Electronic Library. For example, the interviews investigated the use of the electronic course pack service and linking to electronic journals. Particular problems in these areas were documented and passed to the project team for analysis. The interviews also explored the way in which academics approach resource list creation, how this is produced, managed and integrated into WebCT currently, and how a new system to manage resource lists might meet their needs. Course designers were able to offer an insight into technical and developmental issues of integrating WebCT and the Electronic Library. These interviews also provided a specific perspective from a group that “straddle the fence” between students and their teachers. Some questions were identified as being issues that course designers might be able to offer a particular insight into, for example questions concerning the electronic course pack template, which CLT currently recommend is used to display links to these resources.

10 members of library staff were interviewed in two separate groups. The Taught Course Support team, responsible for processing resource lists, were able to give specific insight into the ordering process and the way this process is currently managed. The focus of the Information Services team was on liaison with academic departments and improved resource support for courses. The interviews were supplemented with written explanations of current resource list workflow and problem areas provided by the TCS team.

Students were separately interviewed to allow them the opportunity to speak openly about their current experiences. The students were mainly drawn from a course that is already supported by an online course and that uses online readings extensively. As an incentive all student interviewees were offered book tokens as a thank you.

All interview scripts can be found as appendices to this report.

## **2.2 DMU Methodology**

### **The UNA meetings**

DMU user needs were identified by holding two focus group meetings with staff at the Leicester and Bedford campuses. Both meetings began with an open and lively, directed discussion, on the learning resources at the university. The objective was to record issues that users had with any current system of producing reading and learning materials lists. In the second part of the meeting each person gave each issue an importance rating ranging from: Very Important, Important and Useful. The purpose of the rating activity was to focus the functionality of the Deliver system on resolving those issues that were Very Important and Important to the end users. The issues recorded in the meetings were circulated by email to people that had registered an interest in the project, but could not attend the meetings. In total 24 people proposed, rated and prioritised DMU's issues. However, it is worth noting that some of the issues had very few ratings because either they were raised at different times and meetings, or people didn't consider them as issues and so no rating was given.

The DMU team intended to use the Delphi Technique to obtain and classify UNA information. The first meetings and rating activities did follow the approach, but owing to the project schedule and the associated problems with getting academic involvement during teaching semester time, the team decided not to implement the full technique beyond the first stage. As an alternative approach, each issue identified during the meetings and from the online responses was discussed in turn by the project team at DMU to determine if it was a requirement or a more general comment. These were then converted into recommendations. In this context, a recommendation was a statement that could in turn be converted into a function to be supported by Deliver.

Among all prospective users there was a consensus that the current system of producing resource lists at DMU was unsatisfactory and that a university wide system would have benefits for all users.

### **Combining the Information Sources**

Information for writing the Deliver Use Needs Analysis has come from a variety of sources. To produce a coherent picture of the user needs, the issues were combined by writing a scenario demonstrating the current workflow for resource lists. The process begins with the author, normally a lecturer, thinking about writing a list and ends with the student receiving the list. The scenario is included in appendix E. This will be utilised as part of the project evaluation in order to gauge how well the issues raised in the UNA have been answered.



### **3. Results**

#### ***3.1 Overview of interview response***

The objectives of the DELIVER project were extremely well received by all interviewees. The project plan clearly identified areas of importance for the partner institutions, and development work that was welcomed across the institutions. The most immediate concerns were the need for direct and clear access to more course-based resources for students from any location, and a complete reworking of the resource list system. It was clear that all of the interviewees tended to view the resource list as something that they used to achieve personal goals, and had a limited understanding as to how other groups of users within the institution could usefully use this tool to support their work. This was particularly evident in the general lack of understanding as to how the library used and interpreted resource lists supplied by academics.

The positive response has also proved useful in gaining ongoing commitment from interviewees. Academic interviewees were keen to take advantage of bursaries to further support online courses using DELIVER concepts, and library staff have agreed to remain in close contact with the project team to answer questions and to provide further information regarding the current system.

#### ***3.2 Interpreting the results***

Once all the interviews were complete, the scripts were summarised and examined in detail by the project team. The comments and ideas included in the interviews were then translated into recommendations for the project. In total, 78 recommendations were identified. These recommendations were further classified into institutional recommendations (to be passed across to the partner institutions for information and progression) and system recommendations that were passed to the technical development team.

In order to best interpret the results these recommendations were further divided in a team brainstorming session. The technical and UNA teams identified sets of information that could usefully be passed to specific groups or individuals for further development. The identified sets were:

1. Resource list requirements. This report will be used by the project team to select or develop the appropriate resource list system.
2. Development of the VLE. This report will be passed to the VLE development team, and will be progressed by the project team and the partner institutions.
3. Using ANGEL software. This report will be passed to the ANGEL technical team.
4. Institutional requirements. This report will be passed to the appropriate groups or individuals within institutions.

Relevant and interested parties are welcome to utilise the individual reports as appropriate. The DELIVER project team will take responsibility for passing the information to the necessary teams for further development. This process will allow the relevant groups to quickly and easily focus on the development needed in their areas, without having to separate out from the complete and detailed set of recommendations.

### **3.3 Resource List Requirements**

This document forms part of the Report of the DELIVER Project User Needs Analysis. It is intended to inform the project team and support development or purchase of suitable Resource List Management Systems. It may also usefully inform commercial vendors, partner institutions, and other institutions wishing to implement such systems.

It was clear from the start of the project that any resource list developments would require a large amount of development time. The project team was aware that there were several different options available to them:

1. Develop a new resource list management system in-house.
2. Buy in an existing commercial or open source system.
3. Develop and enhance existing systems in use.

It would also be possible to partly progress one, or all, of these options. This meant that the project team needed very specific guidance on the type of system required by the two partner institutions in order to make the best decisions in the short timescale available to the project. It is recognised that a different system may be required at the two institutions.

This report uses the term 'resource list' rather than the more traditional 'reading list' to indicate the scope of the work needed by the DELIVER project. Any system adopted by the project and in turn by the partner institutions needs to both allow and encourage lecturers to search and recommend a wide variety of material types through a central system. This would include materials not typically included in a traditional reading list.

#### **Recommendations:**

1. Define resource list metadata.
  - ◆ Define required information for ordering.
  - ◆ Allow for ordering parts of books or journals.
  - ◆ Identify preferred ranking system (e.g. background, essential, purchase etc) and tie to ordering information.
  - ◆ To facilitate the above, the system must know how many students are reliant on each text across all courses. A formula can then be applied to scales of purchasing.
  - ◆ Allow for inclusion of abstracts in display.

Metadata for the resource lists is important on a variety of levels. It will make sure that correction information is recorded for ordering, and will also ensure that the correct information is displayed to end-users. It is likely that the project will need to develop a metadata specification, as there are no standard specifications in use.
2. Present information 'normalised' to defined display format.
  - ◆ Unpack abbreviations.
  - ◆ Use established citation methods.

Standardising display data will not only allow for neatness and readability, but will also ensure that presented lists can be easily understood by all parties. It can also help support student use of correct citations.
3. Highlight new order requirements for library staff. One of the lengthiest tasks that current staff face is the repeated checking of resource lists to see if material is already available in the library. As there is no way of knowing how and where a lecturer may have changed a list, this process must be repeated every year. It is important that the new system highlights

- new materials, and also repeat requirements for existing stock to cut this process, freeing staff time for other processes.
4. Allow students to comment on resources. This facility will allow students to pass comments both on the suitability and application of resources, and on resource availability and any other problems associated with resource use.
  5. The system should allow for importing of existing electronic resource lists at institutions. At the partner institutions, some resource lists are already held in electronic format. The ability to import these into the system would provide an excellent starting point for introducing academics to the system ('your list is already available, please update and format').
  6. The system should allow items and lists to be hidden from student view when not currently in use. Not all courses are run from year to year. Academics may also choose to create slightly different lists, without wishing to discard an old list. These lists should be 'hidden' from student view, and re-activated when required.
  7. Allow for importing of MIS data.
    - ◆ New courses (create new list).
    - ◆ Student numbers, course codes, course titles, academic responsible.This process would again cut down on staff time, and make sure that all courses are registered in the system at all times.
  8. All courses should have a resource list on the system. Courses that do not produce a resource list should be registered as such on the system. This will allow library staff to have a clear understanding of how many course resource lists are missing, and how many simply do not produce a list.
  9. The system should allow for directing students to book purchase options, either with Amazon or the local bookshop. Within an in-house system, this could be a potential source of funds through click-through revenue.
  10. The system should support a variety of interface routes into the system, from VLEs and standard course web pages.
  11. The system should allow for linking to journals at the article level, and support for maintaining these links as static URLs.
  12. The system should allow full resource lists to be divided into sub-lists. This would typically support division into semesters or weeks, but should allow academics to define their own headings for sub-lists. This will allow for lists to be divided by subject headings, or material applicability.
  13. The system should include an alerting function that highlights updates for academic staff, library staff and students.
  14. Resource information should be drawn from a variety of targets including: exam paper, e-coursepack, electronic resource databases and catalogue information. The system should also allow for searching of other catalogues through agreements such as the M25 consortium.
  15. The system should make academics aware of all available resources. This is most likely to be in the form of a drop-down menu that allows academics to select resource type.



16. The system should allow for use of concepts already established in institutions through both student display and resource discovery interfaces.
  - ◆ Access icons, material format icons.
  - ◆ Institutional branding.
17. The system should allow for permissions to be given to certain groups of users. This will prevent list creators from adding restricted access / cost associated resources to resource lists. This could include e-coursepacks, off prints, restricted databases etc.
18. Users should be able to view 'live' data about the resources to establish availability.
19. The process of adding a web resource should be as simple as possible for academics.
20. The system should allow for resources to be associated with supporting information / resources. This could be another resource held by the institution, a publisher's website, or other online information.
21. The system should allow academics to add comments to resources. This will give lecturers the opportunity to explain the relevance of the resource to the course and give any instructions to the students regarding readings.

***Progression:***

The DELIVER project team will use these recommendations to review the resource list options available to them. Current systems under review are:

1. ReadingListDirect;
2. TalisList;
3. Loughborough University system;
4. Development in-house.

It will be important to also consider the cost of maintaining the system after project completion. The team will need to consider the financial cost for institutions and support that will be available for the system after end July 2003.

### **3.4 Developing the VLE**

This document forms part of the Report of the DELIVER Project User Needs Analysis. It is intended for use by the partner institutions within the project, but the ideas and needs expressed in this section may also usefully inform other institutions wishing to further develop library services within VLEs.

A clear section of the user requirements identified directly involved the development of institutional VLEs, both in terms of content available and presentation of information. A lot of these developments are required to enable best use of the main technical developments, but will mostly involve manipulating the existing VLE set-up rather than specifying additional new technical developments.

#### **Recommendations:**

1. Develop a library area within the VLE. This should include the following sections:
  - ◆ Information skills and student training.
  - ◆ Journal Reading Room for access to course supporting journal titles.
  - ◆ Multimedia resources.
  - ◆ Resource lists.
2. Include a channel for student comments on resources. This could be used to report resources as unavailable / missing, or for more qualitative response to resource worth and applicability.
3. Investigate pressure of increased use of VLE as an interface to resource lists (staff time, servers, support etc.)
4. Develop standard icons for describing material format in displays. This can help both academics and students understand what type of resource they will visit when clicking a link.
5. Conduct an analysis of current electronic resource areas within VLE courses. In order to best promote a change in the presentation of resources within VLEs, it will be important to understand how course designers currently display resources, how much effort would be required to make this change and the impacts this change will have on courses.
6. All library areas included in the VLE should have a 'hide' option for academics. This will allow academics to maintain control over the way in which their course is displayed.
7. Consider use of distinction between resources (collection level, general) and readings (directed, essential reading) to help academics structure course information.

#### **Progression:**

This information will be passed to appropriate VLE teams for development work. Much of the work will be carried out in association with the DELIVER project team, but decisions concerning VLE interface display and management will be left to the individual institutions. VLEs are customised tools intended to support specific courses within specific institutions and it is important that any developments that the DELIVER project makes allow for continuing customisation and choice.

### **3.5 Using ANGEL**

This document forms part of the Report of the DELIVER Project User Needs Analysis. It is intended to inform ANGEL users and other interested parties of the proposed developments to the core ANGEL middleware managers. It will also be a useful starting point for the ANGEL Development team to define technical specifications for ANGEL development.

#### **Recommendations:**

1. Define list of resource targets. Creators of resource lists will often consider the library catalogue record, or a more generic book finding system as an appropriate target for search request. There are, however, a range of resources held in separate databases that the system could also search. These would need to be converted to ANGEL Resource Managers (RM) and included as targets for resource list discovery and creation.
2. Automatically update 'location' information on resource lists. Many resource lists will send users through to the library catalogue to view 'live' information about book status. This causes problems when users wish to print lists in order to visit the library and locate resources. There is a requirement for a tool that allows this location information to be integrated with the resource list for printing.
3. Develop the Resource Manager (RM) to include multimedia resources. The increased use of non-print/non-text resources means that an appropriate RM development is required to include them. This could mean extending existing databases, or creating a separate RM to control and maintain multimedia resources.
4. Add 'search by material type' capability to RM.
5. Provide statistical information on resource usage to support purchasing decisions. A resource list management system can provide information on predicted resource usage through identification of student numbers on a course, but cannot provide analysis of actual resource usage or access requests. The ANGEL RM could usefully provide this information to help shape and control resource lists.
6. Allow resource items to be linked to supporting information / resources. Resources held in RMs should have a field that identifies supporting resources, either within the RM or externally.
7. Revise access point to collections. Although several different RMs may control access to different sets of data, a common entry point should be used for searching all collections.
8. Support central link maintenance. This RM functionality is already in place.
9. Support linking to journal articles, resolving static URLs. Providing a static link to journal article is currently a complex process for users to follow, and is typically different for all resource providers. The RM should help user's define and select the correct link to use.
10. Allow subject resource lists to be limited, sorted and exported by users for inclusion in VLE course pages. Current RM implementations allow users to view complete lists of resources within specific subject areas. Functionality is required that allows users to edit this list, removing resources and commenting on others, and then adding to VLE course pages.



11. Resources should have an expiry date field. Increasingly, access to resources is limited over time. The RM should include an expiry field for resources and develop a sensible method for passing this information on to users when a resource has expired.
12. Allow for browsing of e-coursepacks, but not searching. Licensing restrictions will not permit currently held e-coursepacks to be available through a searchable database. It would be useful for lecturers to be able to view packs that are already held, without being giving permission to use in their own courses.
13. Allow for RMs to be searched outside of VLEs. Not all users chose to develop online course information through the standard recommended interface. All developments should support multiple interface routes.
14. Identify and convert existing databases at institutions to ANGEL RMs.
15. Provide single sign-on for all resources. This will involve the introduction and implementation of the ANGEL User Manager (UM), and further institutional access management infrastructure and metadata.

***Progression:***

This information will be passed to the ANGEL development team, who will identify the most suitable developments of ANGEL to support this type of work. A development schedule will be agreed between the DELIVER project and ANGEL development team. A similar process will be completed with the DEVIL project which is also committed to utilising ANGEL functionality to achieve project goals.

Current indications suggest that a useful tool to add to the ANGEL toolkit (meeting several of the above requirements) would be a 'smart link-finder' that will allow a course creator to search for an item (such as an e-journal article in a resource list) and return appropriate 'normalised' (i.e. institutionally preferred citation format) bibliographic metadata, plus an indirect URL. The actual resources would be supported and maintained by a central ANGEL Resource Manager (RM). This would allow links included in course resource lists to be centrally maintained and stabilised. In the simplest case, this application could be accessed via its' own Web front-end, allowing the course creator to copy/paste metadata into another window; an extension to this would be a Java applet/servlet, that could be embedded in (called from) the "fill-in item details" form page of many other Web-based applications (such as WebCT), effectively providing an 'auto-complete' function.

Because the resource links followed by course users would be via an RM, this would deal with Appropriate Copy issues for different users, and would also provide consistent logging of all access to all resources so mediated.

All additions and developments of ANGEL will be made available from the ANGEL website ([www.angel.ac.uk/inside/](http://www.angel.ac.uk/inside/)) and disseminated to interested parties. ANGEL middleware managers are supported through a jiscmail list ([angel-insiders@jiscmail.ac.uk](mailto:angel-insiders@jiscmail.ac.uk)).

### **3.6 Institutional Recommendations**

This document forms part of the Report of the DELIVER Project User Needs Analysis. It is intended for use by the partner institutions within the project to support project developments. The document may be usefully passed to Heads of Departments and working parties within institutions. It may also inform other institutions interested in VLE and library join-up.

#### **Recommendations:**

1. Formalise the process for updating resource lists and review the timescale for updating lists. Current thinking tends to focus on the beginning of the academic year as the time for review and creation of resource lists. This point in time is much too late for the library to order material. The most appropriate time to send out requests for resource list updates needs to be reviewed, and academics need to be encouraged to treat their resource lists as an organic list that can alter, and be updated, throughout the year.
2. Include administrative staff in further discussions concerning resource list management. Interviews with academics identified that a large proportion delegate responsibility for sending resource lists to the library to administrative staff. These staff members are often unclear as to the purpose of the request. Building a relationship with administrative staff could provide better support for resource list updates.
3. Investigate potential funds for overtime work for data-entry.
4. Identify best practise and 'cost' of updating lists for staff that do not / will not use the central system. It would be impossible for any institution to successfully convince all members of staff to use a central resource list system. It would be appropriate for the library to clearly define how staff that do not use the system will be supported, how these lists will be processed and what the cost of this additional, and separate process is for the institution.
5. Liase with training unit over release of system. It is important that the appropriate staff are appropriately trained in any new system that is implemented. Partner institutions should make appropriate use of project staff time both before and after project end to help implement into mainstream. This may involve consideration of supporting roles undertaken by project staff beyond the end of the project.
6. Investigate a strategic approach to digitisation of multimedia resources. The DELIVER UNA identified a clear increase in use of multimedia resources by academics. The process also identified that many multimedia resources held by the library (mainly VHS-format moving images) could be digitised with little additional copyright cost. Such a digitised resource collection could form a useful resource for academic staff and students.
7. Create and send an 'Ordering Resources' induction booklet to all academics. There is currently a poor understanding among academic staff as to what the library does with submitted resource lists and how these lists are interpreted for ordering resources. In light of the project developments, an induction booklet may help academics better understand the process prior to implementation of the new system.
8. Staff interviewed suggested that institutions investigate the potential for brining newly appointed academics into the library before the start of teaching to explain the ordering process and to begin building a relationship with the library. Such a process would need to be supported by human resources and would ideally be an obligatory part of induction for



academics.

9. Clean 'false' records from library catalogues. The interview process revealed that a lot of records are held in the library catalogue for resources that have not been ordered or are currently unavailable. These records may have a direct impact on any attempts to automate the ordering process as they may be included in stock counts by the systems involved.
10. Consider wording to use to explain to academics that the creation of a list in the new system does not guarantee an order, or automatically make the item available for use.
11. Investigate ways to make institutional spend and item cost more apparent to lecturers. By placing a 'cost' on academic resource lists, academics are more likely to gain an understanding of the value of the list and implications that this might have on institutional budgets. This understanding is particularly important in development of e-coursepacks.
12. Promote resource lists. The use of resource lists needs to be generally promoted throughout institutions.
13. Revise student-book ratio and how this is applied. There are two potential impacts on the student-book ratio from the DELIVER project. The first is that renewed attention to resources brings renewed attention to the perceived lack of resources, and problems of availability of resources. Additionally, a better process for receiving resource lists may result in more orders being processed. This will directly impact on available funds and how the student-book ratio is applied.
14. Continue work required to make readings available in libraries. One of the suggestions from the DELIVER UNA to support this work was better reporting processes for missing items. Students are often unwilling to take the time to fill in paper forms to report books as missing. If books could be reported with minimum effort on the students' part (a 'click to report missing' button in the VLE or library catalogue), more up-to-date and accurate information about resources could be provided to users.
15. The quality of readings for on-screen display needs to be improved. A high percentage of students chose to view readings on-screen in order to save on printing costs. Some of the e-coursepack materials, although legible in print, are not screen-readable.
16. Review paper coursepacks and level of granularity. Students expressed a preference for being able to purchase parts of paper coursepacks.
17. Promote VLEs as a revision tool / aid.

***Progression:***

The project members at each partner institution will take responsibility for feeding this information through appropriate channels and following up any progression of these ideas. Some areas of this report are more critical than others for the success of the DELIVER project, and it is likely that these ideas will be focussed on and developed in the first instance.

## **Appendix A – Script used for library staff interviews at LSE**

This focus group is being conducted as part of the DELIVER project. The project is examining the integration between the electronic library and WebCT at LSE. It hopes to develop some tools that will be of value to academics / library staff and students. It is looking at developing a reading list system that can be used by all academic staff, not just those using WebCT. It will also develop tools to help them present reading lists, electronic course packs and other electronic library resources in WebCT in a coordinated way.

We would like to interview library staff as they will need to use any new system. We also need to understand the way the process works at the moment and areas where there might be problems.

[DELIVER project presentation]

### **Information Services staff**

#### *Reading lists*

1. Can you briefly describe your involvement in the reading list process at the present time?
2. Are you successful in obtaining reading lists from departments, for all courses?
  - ◆ Approximately what percentage of courses do not supply reading lists?
  - ◆ Do you have problems getting reading lists consistently from certain departments?
  - ◆ How do you try and tackle these problems?
  - ◆ What do you do if an updated reading list is not sent for a particular course?
3. What formats are reading lists supplied in?
  - ◆ Do you need to receive the full reading list, or would you be happier just to receive the items that need ordering / just the items that are your responsibility? (or full list with order items highlighted?)
4. After a list has been supplied, what happens next in the process?
5. What happens to items that are on reading lists?
  - ◆ Do they automatically go into the course collection?
  - ◆ How many copies are put into the course collection?
  - ◆ Does it depend if an item is a core reading or supplementary?
  - ◆ How are these handled separately?
6. Would you ever recommend items are added to the off-print collection if they are a core reading? Or would this decision be made by someone else? If so, who? Academic? Taught Course Support?
7. Are you aware that departments are satisfied / dissatisfied with the current method of collecting reading list information?
8. How might this be improved in your opinion?
9. Do you think academics would be prepared to edit their reading lists themselves?
10. Do you think the library should be responsible for editing reading lists?



*[demo of reading list system]*

11. What is your reaction to this type of system?
12. Do you think academics would be prepared to edit their reading lists themselves?
13. Do you think the library should be responsible for editing reading lists?
14. In your opinion, what features would such a system need in order to be successful?
15. Would you be happy to receive an e-mail alert once an academic has compiled an online reading list?
16. How complex would e-mail alerting be? Who would they need to go to?
17. Would you be happy with academics supplying details as to student numbers / copies required / desired material format or would you prefer this info to come from elsewhere?
18. Would you be happy to create the online reading lists if the academic sends you a paper list?
19. How should academics that do not use the online system be supported? Should Unicorn lists be stopped or should both be maintained for a short time?

*II WebCT and electronic course packs*

1. What is your understanding of the virtual learning environment WebCT?
2. Are you aware of the number of WebCT courses in your department?
3. Are you aware of the number of electronic course packs in your department?
4. Has a department member ever mentioned their WebCT course to you? In what context?
5. Do you think you could play a role in promoting electronic library resources in WebCT?
  - ◆ How might this be done?
6. Do you think library resources are an important component of WebCT courses?

*III Electronic Course Packs / Course Packs / Off prints*

Brief explanation of what they are, how they work and the relationship between the three services...

1. Have you had any involvement with the processing of off-prints?
  - ◆ If so what is your attitudes towards this type of initiative?
  - ◆ What sort of problems do off-prints present?
2. Have you had any involvement with paper course packs?
  - ◆ If so what is your attitudes towards this type of initiative?
  - ◆ What sort of problems do paper course packs presents?
3. Have you had any involvement in the production of electronic course packs?
  - ◆ If so what is your attitudes towards this type of initiative?



- ◆ What sort of problems do e-course packs present?
  - ◆ Could a coordinated service for e-course packs, off-prints and paper course packs work in your opinion?
4. Is there anything else you would like to add?

### ***Taught Course Support staff***

#### *Reading lists*

1. Can you briefly describe your involvement in the reading list process at the present time?
2. Are you successful in obtaining reading lists from departments, for all courses?
  - ◆ Approximately what percentage of courses do not supply reading lists?
  - ◆ Do you have problems getting reading lists consistently from certain departments?
  - ◆ How do you try and tackle these problems?
3. What formats are reading lists supplied in?
  - ◆ Do you need to receive the full reading list, or would you be happier just to receive the items that need ordering / just the items that are your responsibility? (or full list with order items highlighted?)
4. Can you describe how reading list information is added to the library catalogue?
5. What happens to items that are on reading lists?
  - ◆ Do they automatically go into the course collection?
  - ◆ How many copies are put into the course collection?
  - ◆ Does it depend if an item is a core reading or supplementary?
  - ◆ How are these handled separately?
6. Would you ever recommend items are added to the off-print collection if they are a core reading? Or would this decision be made by someone else? If so, who? Academic? Liaison librarian?
7. What happens if an item on a reading list is not on the library catalogue?
  - ◆ If a book needed to be purchased how does this process work?
  - ◆ How many copies of a book would be ordered?
8. What do you do if an updated reading list is not sent for a particular course?
  - ◆ Can you estimate how much library staff time is taken up processing reading lists?

#### *[demo of reading list system]*

9. What is your reaction to this type of system?
10. Do you think academics would be prepared to edit their reading lists themselves?
11. Do you think the library should be responsible for editing reading lists?
12. In your opinion, what features would such a system need in order to be successful?
13. Would you be happy to receive an e-mail alert once an academic has compiled an online reading list?



14. How complex would e-mail alerting be? Who would they need to go to?
15. Would you be happy with academics supplying details as to student numbers / copies required / desired material format or would you prefer this info to come from elsewhere?
16. Would you be happy to create the online reading lists if the academic sends you a paper list?
17. How should academics that do not use the online system be supported? Should Unicorn lists be stopped or should both be maintained for a short time?

*II Electronic Course Packs / Course Packs / Off-prints*

Brief explanation of what they are, how they work and the relationship between the three services...

1. Have you had any involvement with the processing of off-prints?
  - ◆ If so what is your attitudes towards this type of initiative?
  - ◆ What sort of problems do off-prints present?
2. Have you had any involvement with paper course packs?
  - ◆ If so what is your attitudes towards this type of initiative?
  - ◆ What sort of problems do paper course packs presents?
3. Have you had any involvement in the production of electronic course packs?
  - ◆ If so what is your attitudes towards this type of initiative?
  - ◆ What sort of problems do e-course packs present?
  - ◆ Could a coordinated service for e-course packs, off-prints and paper course packs work in your opinion?
4. Is there anything else you would like to add?

## Appendix B – Script used for academic interviews at LSE

We are interviewing academic staff that have a WebCT course about issues concerning integration between WebCT and the Electronic Library.

We are also interviewing course designers who not only may offer an insight into technical/developmental issues, but also offer a specific perspective from a group that "straddle the fence" between students and their teachers. Questions where course designers might be able to offer a particular insight are marked with an asterisk\*

The interviews are partly to evaluate CLT work, and look at ways we can improve the support we give staff. However they are also part of a research project called DELIVER that has recently been funded by JISC at LSE. The project hopes to develop tools that will make it easier to integrate the EL and VLE. These interviews form part of the needs analysis undertaken at the outset of the project, so your opinions are important. We also have small grants available later in the project for academics who would like to try out some of these tools that will be developed in their actual course.

### *1 The Virtual Learning Environment – your WebCT course*

1. What motivated you to set up a WebCT course for students?
2. Which features in particular encouraged you to using the online environment?
  - ◆ Content delivery, e.g. lecture notes, course documents?
  - ◆ Communication tools?
  - ◆ Online assessment?
  - ◆ Online readings?
  - ◆ Other features?
3. How important to you is the online reading element in your WebCT course?
  - ◆ Why did you want to include online readings in your course?
  - ◆ Do you think they have been successful?
4. How easy did the process of requesting online readings seem to you?
5. Were there any problems you were aware of with preparing the online readings?
  - ◆ Copyright
  - ◆ Technical?
  - ◆ Limitations of type / length of extract
  - ◆ Other?
6. Did you include links to electronic journals in your WebCT course?
  - ◆ How were the links to journal articles created?
  - ◆ Did you know all the journals were available in electronic format?
  - ◆ Did you experience any problems with links to e-journals?
7. Did you use the electronic course pack template in your course?
  - ◆ Were the icons useful to distinguish between resources available on and off campus?
  - ◆ Did you experience any problems with accessing readings from off campus?
  - ◆ Did students bring any problems concerning the electronic course pack to your attention?



- ◆ What were these problems / where did you refer them?
- 8. Where do you expect your students to access this material (on campus / halls / at home / laptop / plane over Hawaii) etc. etc.
- 9. Access to the electronic course pack items was entirely through WebCT, do you think it would be useful to be able to access these readings elsewhere? For example, the library catalogue, or a part of the library website?
- 10. Would you like a defined 'library' section in WebCT?
  - ◆ What should it include? (just a link to library pages / catalogue? customised lists? your readings? subject lists?)

### *II The Electronic Library – their knowledge and use of it*

[demo the Library website and the Electronic Library resources available]

1. How familiar are you with electronic library resources available from the library website?
  - ◆ Do you use the library website?
  - ◆ Do you use the library catalogue?
  - ◆ Do you use the Gateway to the Electronic Library (called EASI last year)?
  - ◆ Do you use the Electronic Journals page?
  - ◆ Have you done any online tutorials available on the library website? Which ones?
  - ◆ Have you used anything else in the Electronic Library? Prompt with IBSS / SOSIG etc?
2. If you wanted to use a journal, how would you find out if it existed in electronic format?
3. If you wanted to use an electronic library resource, how would you find out if it was available at LSE?
4. If we look in more detail at the Gateway to the Electronic Library
  - ◆ Have you used the [subject] resources?
  - ◆ Would these resources be useful in your WebCT course?
5. If we look at the Electronic Journals list
  - ◆ Do you use the [subject] journal list?
  - ◆ Would these resources be useful in your WebCT course?
6. Would other electronic library resource be useful if they could be added to your WebCT course? E.g. the library catalogue?

### *III Reading lists (questions only for academics)*

1. How do you currently make your reading list available to students?
  - ◆ In what format?
2. Do you provide the library with a copy of your reading list?
  - ◆ In what format?
  - ◆ Do you edit the reading list yourself or do admin staff in your department?
  - ◆ How frequently do you update the reading list?
  - ◆ How is the list organized? By week, by subject etc.?



3. Do you include all available resources in one list (ie. books, e-journals, website links) or do you maintain separate lists?
  - ◆ Why do you chose to do it this way? (ie. are there restrictions that prevent from displaying how wish, do you feel it is better to maintain separate lists etc.)
4. Do you make you reading list available in WebCT?
  - ◆ In what format?
  - ◆ Is this successful?
  - ◆ Could this be improved?
5. Demo / describe reading list system – what is your reaction to this kind of system?
  - ◆ Would you want to edit your reading list in this kind of system in place of the method you are using at the moment?
  - ◆ What resource collections should the system be able to look up? E-Coursepack materials? Lib Cat? Exam Papers? Subject resources / EL? Multimedia resources? Other (M25 resources for example)?
  - ◆ would you like to be able to annotate bib. references downloaded with comments for students?

Make clear that this is probably not (but could be!) the system that we are going to use. Probably use a custom-built system that will exactly match the requirements of LSE staff and students so let us know how you would want it work now!! Make clear that it would be resource look-up, reading list creation and sending orders to library all in one.

#### *IV Integration*

1. Who would you contact if you wanted to include additional library resources in your WebCT course?
  - ◆ CLT librarian? Liaison librarian? Don't know?
2. Are there any other comments you would like to make concerning integration of WebCT and the Electronic Library?
3. Are there any other comments you would like to raise before we finish?

## Appendix C – Script used for student interviews at LSE

The purposes of the focus groups are to:

- ◆ Collect feedback on the HY202 WebCT course
- ◆ To collect information for a project LSE is working on, called DELIVER, looking at how we might better integrate Electronic Library resources within WebCT.

The discussions will focus on the online readings in your course – including the PDF documents, the readings provided by links to electronic journals and the links to historical documents on various web sites. I also have some questions about the electronic library resources available at the LSE.

All comments are confidential and will be anonymised before they are fed back to the course lecturer, so I would like you to be as honest as possible. We are also looking for ways of improving the course for next year so your feedback is very important.

### *I Your WebCT course: HY202*

1. Is HY202 the first time you have taken a course that uses WebCT? If not, what other courses have you taken?
2. What are your general attitudes towards the HY202 WebCT course?
  - ◆ What do you like about the course?
  - ◆ Which sections were useful?
  - ◆ Why were they useful?
3. What do you dislike about the course?
  - ◆ Which sections were not useful?
  - ◆ Why were they not useful?

### *II The online readings (course pack)*

1. Do you use the online readings?
2. In a typical week, how many of the readings would you consult?
3. What do you think of the online readings?
  - ◆ Are they useful? In what way are they useful?
  - ◆ Do you visit the library more / less / about the same as for other courses?
  - ◆ Are there any problems with the online readings?
  - ◆ Is it clear which readings are available on and off campus?
  - ◆ Do you read them on-screen or print them out?
  - ◆ Do you use them on campus / from home / from halls of residence? Where do you expect to be able to access these resources from? Where do you access them from most often?
4. Have you ever had any technical problems reading the items on screen / printing out the readings?
  - ◆ Can you tell me about these problems?



- ◆ Have you experienced problems downloading files from off campus because of their size?
- 5. Have you any comments about the quality of the PDF documents available? You may have noticed some have been scanned in-house and resemble an off-print. Is quality an important issue for these readings?
- 6. What about the quantity of readings available in the course pack? Would you say there were too many / too few / about the right number?
- 7. Do you go to the library and consult the additional reading that is not available electronically?
- 8. Has the course pack had an impact on the way you learn?
  - ◆ Do you read more / less than for others courses?
  - ◆ Do you feel better prepared for seminars?
- 9. How does the electronic course pack compare to a paper course pack / an off-print?
  - ◆ Is it more convenient? Less convenient?

### *III The Electronic Library*

[demo the Library website and the Electronic Library resources available]

1. How familiar are you with electronic library resources available from the library website?
  - ◆ Do you use the library website?
  - ◆ Do you use the library catalogue?
  - ◆ Do you use the Gateway to the Electronic Library (called EASI last year)?
  - ◆ Do you use the Electronic Journals page?
  - ◆ Have you done any online tutorials available on the library website? Which ones?
  - ◆ Have you used anything else in the Electronic Library? Prompt with IBSS / SOSIG etc?
2. If you wanted to use a journal, how would you find out if it existed in electronic format?
3. If you wanted to use an electronic library resource, how would you find out if it was available at LSE?
4. If we look in more detail at the Gateway to the Electronic Library
  - ◆ Have you used this?
  - ◆ How have you used it?
  - ◆ Have you used the History resources?
5. If we look at the Electronic Journals list
  - ◆ Do you use this to locate journal titles?
  - ◆ How do you search it? Alphabetically? By subject?
  - ◆ Do you use the History journal list?

### *IV Integrating WebCT and the Electronic Library*

Going back to thinking about the Electronic Library...



1. Are there any other electronic library resources that you might like to be available in your WebCT course?
2. Would it be useful to have a link to the Electronic Library / to Electronic journals so you could search them directly?
3. Would it be useful to have a link to the library catalogue?
4. Where material is not available electronically would it be useful to be able to link through to the catalogue so you could check if an item is in the library / place a hold if necessary?
5. Are there any other features (library or otherwise) you would like to see in your WebCT course?
6. Is there anything else you would like to add related to this topic?

## **Appendix D – Script used for focus groups at DMU**

1. Does the Kimberlin Library have a form for reading lists.
2. Does the library have its own classification system for books that must be used / read by students. Typical terms are: Mandatory, essential, critical, important, recommended. We would strongly suggest that there are only two types. Mandatory and recommended. Mandatory a must be read by students in order to learn their module, everything else is supporting material.
3. Do new teaching staff get an introduction from the library that explains the role of reading and resources lists.
4. How do you find out about new courses which will need supporting with library resources
5. How do you deal with missing items on the catalogue
6. Does Talis include some ordering functions.
7. Do you provide an automated method of students providing feedback about the library, which is responded to by the library.
8. Are there items on the OPAC that the library does not hold or have copyright access to

These questions were used in the focus group meetings to prompt responses for the audience.

- Do you write learning resource lists now and are they paper or computer based?
- Are they easy to do?
- How do you reference electronic resources, do they have specific problems with them?
- Are there resources you want to reference but can't?
- What functions does your resources list perform?
- Are there subject / course specific issues with resources lists?
- Do you currently use a VLE?
- Are the resources lists organised differently in a VLE, Better, worse, same?
- Do you have weekly reading lists for students, why or why not, do students read them, and are they for tutorials?
- Do you use e-journals tools in the library?
- Do you use subject packs / lists that currently exist in the library?

#### Appendix E – DMU Resource List Scenario

This defines the current resource list system at DMU and was used as part of the interviews to establish perceived points of improvement.

1. A lecturer writes a resource list using a word processor. This is either done on their own initiative, or in response to a reminder sent out by the library at the beginning of the summer vacation, or perhaps by their colleagues or school office reminding them.
2. The resources are typed in from a series of different sources and will probably include the following: the library catalogue, paper copies of journal references, cutting and pasting from online booksellers, hard copies of books, from a paper written for a journal several years ago and from a document written using an older version of the word processor and from online bibliographies. Other sources may also have been used.
3. The list may be divided into mandatory and background reading, with notes about each resource and its benefits related to the module or, it may just be a plain list.
4. The list is printed out and a copy is sent to the school office for duplication and distribution to students, another sent over to the library and a copy is sent to the university bookshop for them to order any necessary texts.
5. The staff in the library, open the post see that it is a reading list and send it on to the correct subject librarian. Reading the items listed makes this decision; there is no title, or accompanying note or indications as to which module or subject it is for.
6. The subject librarian gets the list.
7. The librarian reads the list and finds that it has information missing, this may be among the following: who wrote the list, which module it is for, how many students are on the module, when does the teaching start, will the lecturer be using one of the books as a teaching text and to confirm mandatory texts. The bookshop will need the same information as the library and may have to carry out the same process.
8. The librarian locates and contacts the lecturer that wrote the list by telephone.
9. Between them, the lecturer and librarian work together to complete any missing information. This information is recorded by the librarian on a page attached to the front of the reading list. This is the "Reading List Checklist". This checklist is only used by Business and Law Faculty and the Humanities Faculty Librarians. The other librarians do not use this form.
10. A decision is made about any resources that are on the resource list but are not held by the library and any necessary resources are ordered by completing an "Order Card" for each resource. There will be issues with budgets and costs here, but these are outside of the scope of this project. Each item needs a separate paper order card. Order cards are sent to the database group who compile and send out the orders.
11. The librarian tells the lecturer using any preferred method (by email, telephone, or internal post) what has been done by the library and any problems. This includes the number of resources, which are usually books held by the library.



12. The resources list is distributed to students at the beginning of the module. The student then use the resource list to support their learning. The resources list is often used as an index to locating the resource.

## Appendix F – LSE Resource List Scenario

This describes a potential future system, with ideas and annotations from Taught Course Support staff at LSE. It was used as part of the interviews to identify library perceptions of a new system.

### 1. Lecturer (or suitable delegate) puts resource list together online.

**How this might work:** The lecturer compiles a central list of all resources - online, book, e-coursepack, e-journal - although they could subsequently be able to rearrange this list into smaller lists by week, type, alphabetically etc. etc. for display purposes. The bibliographic information is automatically extracted from appropriate source (i.e. pulled out of the catalogue electronic library) and presented in the list (with appropriate 'access icons' ). If the item is available, it is flagged 'available', if it is not, the lecturer is prompted to order.

**Comments from staff:** The main source they would use would be the library catalogue (e.g. Z39.50 link into Unicorn), plus interfacing with any future ejournals systems that we may have. For finding information about books not on the library catalogue, we would need an interface into a database of books in print. We currently subscribe to BookFind on the web, although this does not support Z39.50 as far as I know. Alternative big databases with good coverage might be the CURL database, which does have Z access. We'd need to check the licensing agreement with BookFind - currently it probably only supports a small number of concurrent users.

### 2. List is sent to library for ordering.

**How this might work:** all the appropriate teams are sent an e-mail alerting them to the fact that a new list has been created. They can then enter the system and begin processing the orders. They mark items once they have been progressed. This will change status on lecturer's list to 'ordered' or similar.

**Comments from staff:** We wouldn't need an email - logging into the system would be part of our daily routine and we would prefer the system to alert us to items that need attention. The system should allow us a full view of all the reading lists, but also to enable us to filter views based on record status, e.g. items not yet ordered, items on order etc. For the ordering process, the system should retrieve bibliographic details either from the library catalogue or from an external database as mentioned above. For items not found in any of these sources, the minimum information would be:

- ◆ Books: ISBN / Author / Title / Publisher / Edition / Year / Source of information (i.e. where they found out about it) .
- ◆ Journal articles: Journal title / Author / Title / Volume / Part / Date.

### 3. Order Status.

**How this might work:** regular updates are sent to the lecturer and the people responsible for ordering as to the status of material via automatic (weekly?) e-mail updates.

**Comments from staff:** Should be customisable by the user, e.g. opt whether he/she wants to receive a regular email update or not.



#### 4. Order Received.

**How this might work:** when an order has been received, it is marked in the database and automatically updated on the lecturer's reading list. If it can't be ordered, or if there is a problem, this can also be marked. The lecturer receives notification as to the status of material via automatic e-mail.

**Comments from staff:** There should be a strong link to the Library catalogue (Unicorn), where the ordering information will reside. Current status of the order should be retrieved from Unicorn rather than stored separately in the RL system.