



# Case study

## Widening use of JUSP through training

In many libraries, JUSP is primarily used by acquisitions or e-resources librarians and teams, and the collection, collation and analysis of usage data often sits within the remit of these teams. As data becomes more important in decision making there is growing pressure on e-resource librarians to provide usage statistics and an increasing need for more members of the library team to engage with, and be able to interpret, usage statistics. In some libraries there is a desire to encourage wider use of JUSP by subject and liaison librarians as a tool to support renewals processes and purchasing decisions.

In this case study we describe how the Imperial College London library carried out staff training on JUSP to encourage use and to improve the annual renewals process. It looks at how the training fits into the context of the library processes, what aspects worked well, any challenges and outcomes of the training.

### JUSP training for library staff at Imperial College London

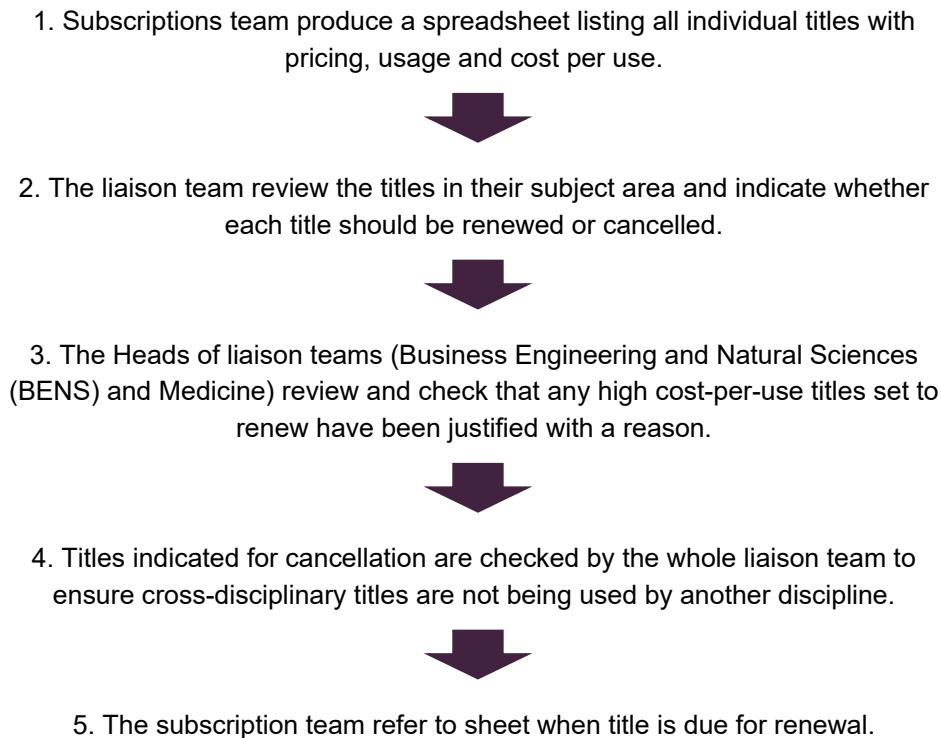
#### Renewals process

At Imperial College London, the responsibilities for journal renewals are split between the e-Access, Licencing and Subscriptions section of the Content and Discovery team (referred to as the Subscriptions team) and the liaison teams, and the process as a whole is overseen by the Collections Development Operational Group, chaired by the Head of Library Liaison (Medicine and NHS) and formed of other members from relevant library teams.

Aside from the big deals, Library Services manages a large portfolio of individual journal subscriptions and small packages that need to be renewed individually at various times throughout the year as some do not run on a calendar year subscription. In the past this meant that a large volume of emails was exchanged between the heads of the liaison teams, 15 liaison librarians and the Subscriptions team throughout the year as each title came up for renewal. This was inefficient and burdensome for all involved.

To streamline the process Library Services introduced an annual “Review and Renew” exercise (Figure 1). The Subscriptions team now produces a spreadsheet in June listing all individual titles and relevant information including pricing (last 3 years), usage (last 2 full years, and pro-rated estimate based on Jan-May data) and cost per use. The liaison teams then review all titles over a six-week period during the summer (June and July) instead of picking them up individually throughout the year. The Subscriptions team process the titles indicated for cancellation and when remaining titles are due for renewal, they refer to the spreadsheet without the need to consult the liaison librarians, unless there is an issue such as an abnormal price rise.

## Figure 1: Review and renew process at Imperial College London



*Figure 1: Review and renew process at Imperial College London*

## Need for JUSP training

The annual review approach has greatly reduced the volume of emails. Within the spreadsheet there is a column for comments where the liaison librarians can ask the Subscriptions team questions, and it was noted that nearly all comments during the 2017/18 cycle were related to queries around usage statistics. This meant there were still a lot of questions going back and forth, but they were added to a spreadsheet rather than sent by email. The Collections Development Operational Group wanted to encourage the liaison teams to take more ownership and responsibility for their portfolio by empowering them to investigate usage statistics independently. Offering training on JUSP was a way to give them the tools they needed.

Library Services had previously run training on JUSP in 2013 when two members of the Subscriptions team cascaded what they had learnt from attending an open JUSP workshop. While some liaison librarians did start using JUSP following the training, many still did not feel confident with the usage data and continued to refer to the Subscriptions team rather than investigate directly themselves.

There have been significant developments in JUSP since 2013, such as the addition of book reports, database reports and data visualisations, and so it was decided that Imperial would run another training session in 2018 to bring everyone up to date with changes and raise awareness of the service generally. This coincided with a JUSP team requirement for a London venue to run a training workshop. As part of a mutually beneficial agreement Imperial hosted the workshop and the JUSP team ran bespoke sessions specifically for Imperial College London Library staff.

## Planning and delivering the training

Working closely with the Head of Library Liaison, Business Engineering and Natural Sciences (BENS) and one of the e-Access, Licencing and Subscriptions Coordinators, the JUSP team planned and ran the training in summer 2018.

As part of the planning and organisation process, the library team set clear objectives and expectations. The Heads of Library Liaison wanted the liaison librarians to be able to use JR1 reports for their annual review of subscriptions and learn about the use of COUNTER book reports. June was the ideal time to run the training as it was just before the annual review and renew process started. The training was primarily aimed at liaison librarians and they were strongly advised to attend because that year they would be expected to check JUSP usage before contacting the Subscriptions team with queries. The training was also offered to the members of the Subscriptions team as a skills refresher and to staff interested from the wider library team.

To allow for maximum attendance the two and half hour session was run twice; in the morning and afternoon. Around 25 staff attended, coming with a range of previous experience with JUSP.

It was important to ensure the presentations and exercises were relevant to the audience, and so pulling together a clear brief before the training was essential. The training consisted of presentations, discussion and hands-on activities to practice using JUSP. The presentations started with a quick overview to provide some context. This included both Imperial specific information such as the purpose of the training, data coverage for Imperial, and key internal contacts (see figure 2), but also general information about COUNTER, what JUSP is and how and why JUSP is used by libraries in

general. The training then focused on using JUSP in workflows applicable to the liaison librarians. The journals were covered first and then books and databases were introduced separately to break down the training. Each section involved a live demonstration using Imperial data followed by an exercise (see figure 3) and discussion to embed learning. The benefit of using Imperial's real data is that it made the training more relevant and less abstract.



The slide features the Jisc logo in the top left and the title 'JUSP at Imperial College London' in the top right. The main content includes a list of bullet points: 'One of the first libraries to join in 2010', 'Some data back to Jan 2009, but not all...' (with sub-bullets for 'new publishers join' and 'subscriptions change'), and 'Data available for:'. Below this is a table with three columns: 'Journal providers', 'Book providers', and 'Database providers', each with a small icon below it. At the bottom, it lists the 'Imperial contact' as 'jusp@imperial.ac.uk'. A footer contains '©2018 JUSP - Imperial College London'.

Figure 2: Presentation slide

## Introduction to JUSP

Imperial College London – June 2018

### Journals

#### Reviewing journal subscriptions

The Journal Report 1 (JR1) is the main usage report used in analysing the usage of journals. It shows the number of successful full text requests for each title in each month for a publisher.

- Run the JR1s for Annual Reviews covering the period January to December 2017.
  - How many titles are included in this report?

- What was the most used title?

- Click on the title to view usage of this title over several of years.
  - In what calendar year was usage highest?

The JR1 shows all usage of all titles on a platform regardless of whether you have a subscription and so includes usage of backfiles/archives and gold open access articles. The JR1a is a subset of the JR1 showing only usage from the archive. The JR1 GOA is a subset of the JR1 showing only usage from gold open access articles. Often when evaluating a subscription and looking at cost-per-download you are only interested in the usage you are paying for.

- Run 'JR1s report excluding backfile usage and GOA' for 2017 and Annual Reviews. Sort the "Direct JR1s minus JR1a and GOA" column highest to lowest.

Figure 3: Using JUSP practice exercise

## Feedback on training

A feedback form was distributed at the end of the sessions and the responses received were very positive and demonstrated that the training was successful in delivering timely and relevant information in an engaging format. It was felt that everyone got something from the training and that the choice of reports shown and highlighted were those most relevant to the team.

However, there were challenges with delivering a condensed training session to a group with varying levels of experience. One person observed that: "Whilst the session was very good and engaging, there was quite a lot to take in." They went on to suggest that if similar training was run again internally that it would be worth splitting it up into two sessions and delivering them over a longer time period.

The Head of Library Liaison (BENS) suggested a flipped learning approach as another alternative. The flipped learning concept is familiar to librarians involved in teaching and could work well at institutions where it was not possible to run long staff training sessions. In this model, attendees are given a specific task to do beforehand, such as watching a video or reading a document, and it is clearly stated that the training session starts from that point. This could be useful in a group with varying levels of experience as the pre-session work would get everyone to a similar starting point. Alternatively, another option could be to target sessions at specific levels of expertise. For smaller library teams one-to-one training may also be an option.

## Outcomes and benefits

Not only was the training well received from the perspective of the attendees in terms of content and delivery, it also met the wider objectives from a library management perspective in supporting changes to processes and improving staff knowledge.

In addition to attending the training, the liaison librarians were strongly encouraged to use JUSP during the review process and this meant that using JUSP became embedded in their procedures. If they have a query about the usage they are expected to check JUSP and investigate for themselves before approaching the Subscriptions team for further

advice and information. There is evidence that behaviour has changed as a result of the training, as it is clear from the comments in the 2018 review spreadsheet that liaison librarians had checked JUSP before adding their query. The Head of Library Liaison (BENS) believes that if the liaison librarians had not attended the training they would not have been able to carry out the process as well as they did.

The liaison teams now have greater knowledge and awareness, understanding how and when to use various JUSP reports, the limitations of usage statistics more broadly, and confidence in interpreting usage dips and spikes.

The liaison teams are now less reliant on the Subscriptions team and this has benefited the Subscriptions team by reducing the workload of double and triple checking usage data. The Subscriptions team still provide usage data for each resource, but if liaison librarians want to investigate further they can now do so independently without needing to send requests and queries to the Subscriptions team and wait for a response.

In an internal survey following this year's review and renew exercise, liaison librarians commented that they liked being able to view additional details such as monthly usage trends and usage from recent months since the spreadsheet was compiled. Renewal decisions are not made on cost-per-use figures alone and the liaison librarians also use knowledge of subject, courses, and special projects. However, any titles with a high cost-per-use that are set to be renewed must be justified with a reason and having more detailed and up-to-date usage data can be useful in these cases. For example, the pro-rated figure for the current year might be low but with the monthly trends they may see that there is usually a spike later in the year.

At Imperial JUSP is primarily used for renewals but other data such as access denials and turn-aways are also being used. The training also introduced JUSP to new audiences. JUSP is often viewed as a subscription tool at Imperial but the members of the Scholarly Communications Management team who attended the training discovered there was more to JUSP than subscribed journal usage and they have also started looking into how they can use the data in JUSP.

## Summary and success factors

The training at Imperial was very well received and the objectives were achieved. The liaison teams are now better engaged with their portfolio and have a better understanding of their collection. Most importantly the training enabled a successful change in process which was clearly stated at the outset. The timing was also key to the success of the training as it was offered just before the review process began so the librarians could put into practice what they had learnt soon after attending.

While the type of training needed will depend on how different institutions manage their renewals process and the level of input liaison librarians have in that process, the key success factors are generally applicable to any successful training:

- ◆ Timing of the training
- ◆ Relevance of the training to the audience
- ◆ Context specific to help encourage and embed learning
- ◆ Clear expectations for all staff involved
- ◆ Clear objectives for the training session and effective pre-course planning

## What you can do now

The templates of the slides and exercises from the training are available to the JUSP community to help plan their own training. These resources can be accessed from the Community Area within the JUSP portal alongside other guides and examples to support training. Note that sign in is required.

- ◆ Take a look at the 'Quick guide: resources to support training colleagues' for an overview of the various resources available covering COUNTER, usage statistics and JUSP
- ◆ Get ideas for planning your own training session from the example slides 'JUSP training at Imperial College London'
- ◆ Develop your own quick reference guide to hand out to your colleagues as a reminder of the key information. Example: 'Quick reference guide to JUSP for Imperial College London'
- ◆ Adapt the 'Using JUSP practice exercise template' by making use of your own institution's Release 4 usage data to create a practical exercise for Release 4 reports relevant to your audience