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OBSERVATIONS FROM PILOTING A GLOBAL OA EBOOK USAGE DATA TRUST: LESSONS LEARNED AND WHAT'S NEXT

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[Aim for 1200 words]

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Hi, I’m Rebecca Welzenbach, Research Impact and Information Science Librarian at the University of Michigan Library in Ann Arbor, Michigan. I bring to this project experience of working directly with a medium sized academic publisher--the University of michigan press--for many years wrestling with the problems of OA book metadata that my colleagues have just described. And, more recently, I’ve been working directly with researchers, faculty, authors, etc.--all of whom are trying to understand and communicate effectively about the impact of their work.

The part of the project I’d like to focus on today, in terms of lessons learned, challenges that remain, and future possibilities, is the experience of engaging with a usage metrics dashboard as a user -- a publisher, or potentially an author. How do we make sense of it? How do we interpret its secrets for others? What problems did we imagine this would solve for us when it was a fuzzy dream, and what new twists and turns can we now see up ahead on the road?

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As this project came into being, participants had, I think, a pretty clear sense of the problems we were facing, and how we hoped the project would help.

- Publishers knew that they had usage data that was fragmented -- difficult to gather, and manage. We wanted that to be…..better. Somehow….standardized, aggregated, combined. In...some….way.
- We knew that in its current form, this data was difficult to make sense of. Even those most familiar with, for example, monthly usage reports from the service like JSTOR, still found ourselves a bit at loose ends when it came to actually making meaning out of that. What should we take away from these numbers? How should they inform decisions? What do they mean? And beyond that -- what the heck should we be telling authors? Funders? WHo has the time? We wanted the information to be visible, accessible (to the right people--another think we learned; we vary in terms of which information we want to make public, to who, and when). When people have questions about

usage, and about impact, we wanted a place to send them. Ideally, an informed, self-service place where they could get all the answers they needed (with appropriate context and caveats of course!) without taking up lots of extra time from our limited, overstretched staff.

- And, finally: we know that there's just a torrent of information, and we can't predict exactly what questions we'll want to answer. Ideally, this tool would be dynamic, interactive, infinitely customizable or, failing that, infinitely customized to meet the needs of specific stakeholders. Surely, surely, a basic canned report couldn't be enough.

Lessons learned? Well, in implementing the pilot dashboard and going through a process of testing and responding to it, the Press has certainly learned that putting something concrete on paper, or on screen, as it were, *always* entails trade offs. There are things that just don't work, or just don't work the way we imagined, that become immediately evident when there's something to look at.

Rather than creating an ideal, we've done something better--the pilot dashboard project has built something *real,* and in so doing, has helped to reveal what choices are built into the technology, which remain in the hands of the users, and which have yet to be developed.

Let’s take a look. (Kevin, advance the slide please)

Just one screen shot is an example of just one tiny part of the dashboard under development for the University of Michigan Press. Here, you can see that, while we have indeed brought usage data form a number of different platforms into one place where they can be viewed alongside one another, they actually can’t defensibly be combined into a single visualization of “total usage” or “total downloads,” because of differences like JSTOR’s counting of chapter downloads as opposed to Google Books’ of whole books. This trade off in convenience/simplicity is actually a win for transparency -- the user can immediately see where the data is coming from and how it differs across platforms. Lesson learned -- livable trade offs built into the tool.

Details like labels and explanatory text also reveal the challenges in ever making a tool like this truly “Self-service” for a non-expert user. As we explored the dashboard, we found that we wanted to display more information about things like “cross ref events” -- could we link to text explaining what this is, how it’s counted, because a user landing on this dashboard may not understand. etc.? Well, yes. And documentation is doubtless a good thing. But will this wandering user actually want to read that much background and, even if they do, will it help? Striking a balance between the appropriate amount of documentation and guidance has been challenging.

While the U-M press is committed to making this information publicly accessible (that's a choice each press has to make for itself!), there is also some reckoning to be had with whether training/support from a human expert within the organization is really more reasonable way to imagine users such as authors, funders, or institutional bodies engaging with this tool. And that's fine, but it entails coming to terms with the fact that folks within the press need to be prepared to provide this support, and also to own this. We don't want to look like we're being exclusive or secretive or keeping access to information behind a gatekeeper. But also, we're not really being transparent if we just expose stuff that no one can reasonably make sense of, or that they might risk interpreting or applying inappropriately. Lesson learned: a dashboard, no matter how thoughtful, will never fully replace human support and interaction.

And, finally -- we've dedicated a lot of time an effort, as Kevin has described, to describing users and personas. At times we have imagined differentiated, specialized dashboards for different users -- authors, publishers, funders, etc. These discussions go back and forth and never seem to end. This summer, as we were planning, we ended up settling on the idea that, while all of these different stakeholders do exist and have different aims, the data they would be looking for wouldn't actually differ enough to merit developing multiple separate dashboards. If there was a 80-90% overlap between the information that each stakeholder would want, surely for a pilot starting with that first dashboard would be adequate. It was a thoughtful, practical, and well considered decision. And then -- at least, it felt to me--in the first demo of the dashboards, when the time came for questions: almost immediately: what about the idea of *different* dashboards for different audiences? Who is this really for? Lesson learned: some questions will never go away--or maybe they will, when we're all a bit more used to this space, and have a shared sense of norms -- what's typical, appropriate, and sufficient. Right now, it still really feels like, even when we're looking at something quite useful, we're still not really sure. Is this what we wanted? What's missing? Are these even the right questions? This will take time, it will take getting acclimated to this space, and it will take practice with using, understanding, communicating, and applying this data.

What I'm looking forward to? Actually getting to see some of the human side of this work happen. The project thus far has been all about gathering data and getting it *into* a dashboard. Seeing and interacting with the dashboards is still incredibly new--pilot partners have just been getting to do this within the last month. So we really haven't yet quite gotten to the "now what" part of the equation -- how will this answer our questions, how will it change our work, how will our values inform what we choose to do with this information? That's all yet to come, and that's what I'm most looking forward to.