Delivering core text material electronically:
a project management perspective

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Abstract

The subject of this article is the Core Text Project at the John Paul II Library in the National University of Ireland Maynooth. This is a project that aims to give 24/7 access to as much core text reading material as possible. The article outlines the project from conception to implementation from a project management perspective. It also looks beyond the project to its development as a mainstreamed service.

Introduction

The John Paul II Library, National University of Ireland Maynooth serves a student population of approximately 8,400 students. As is the experience of most higher education libraries, meeting the expectations of students around the provision of essential reading material is a continuous challenge.

The Strategic Innovation Fund (SIF) was established in 2006 by the Minister for Education and Science to support innovation in higher education institutions in Ireland. As part of a total spend of £236m/€300m[1] spread over 5 years, the first call for proposals was made for a total fund of £31m/€40m. One of the four key objectives of the SIF funding is to "support innovation and quality improvement in teaching and learning".[2]

In line with its Strategic Plan[3], the Library put in a successful bid in May 2006 under this theme proposing the appointment of "a suitably qualified person, on a two-year basis" to establish an "appropriate and innovative service" that would "address and manage student expectations in this area".[4] This was also very closely aligned with the University's Teaching and Learning Strategy[5] and Strategic Plan[6].

Conception to Implementation

As part of the implementation of the Strategic Plan, the Student Reading Team was set up to progress this project. It has strong representation from Reader Services because of the department's existing responsibility to maintain the Reserve and Short Loan Collections.[7] There is representation from the Acquisitions Department because of its role in applying related collection development policies and the Systems Department because of the need for expertise in the application of technology.

Diagram 1 illustrates the project management model adopted by the team. Key features of this model are the scoping stage before any detailed planning takes place and the two stages for assessing the feasibility of the project prior to implementation.
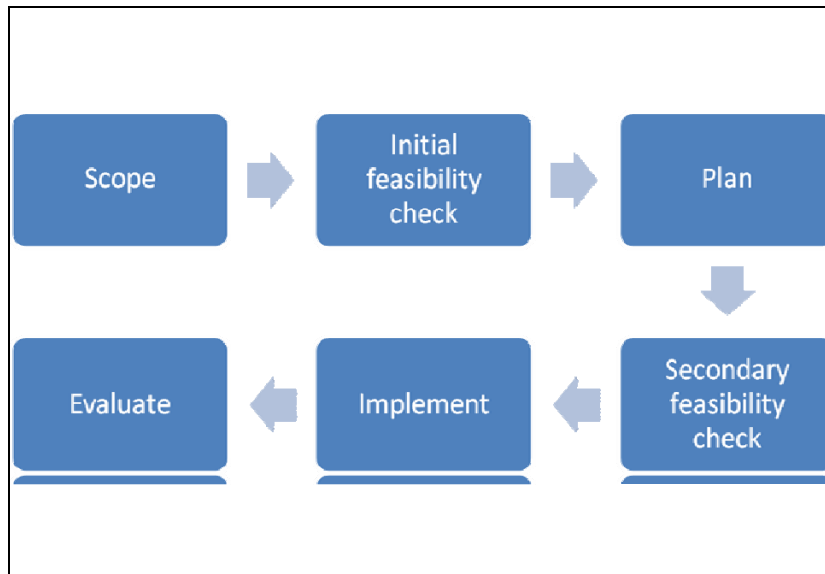
Diagram 1 – Project management model

The team began by scoping the project. This involved outlining the issues the project seeks to address, identifying the stakeholders, their needs and expectations, defining the aim, objectives and expected outcomes. The result was a clear understanding of the project rationale that gave structure, direction and focus to the planning and implementation stages.

The aim is to provide 24/7 access to as much core text material as possible by December 2008. The aim and objectives were underpinned by 2 guiding principles that were to inform decisions throughout the project:

- To prioritise solutions with maximum impact
- To ensure long-term sustainability and mainstreaming

It was at this stage, that the decision was taken to focus primarily on achieving electronic access and to by-pass any formal links to reading lists. The reason for this is the difficulty, based on past experience, of acquiring reading lists in a comprehensive manner and the effect this might have on progress. It was also felt that this decision could easily be reversed at a later stage, thereby further enhancing access to core text material.

Planning

In February 2007, the Library received confirmation that funding had been granted for £44,000/€56,000 with the understanding that the Library would commit the same amount. With this in place and the project scoped and assessed, the Library's Management Team gave the go-ahead to bring the project to the next stage.

Having explored all the options, the team recommended the appointment of a Project Manager for one year at Assistant Librarian grade as the most effective use of the funding. The post was advertised in April 2007. The successful applicant had the right combination of both library and computing experience.

The Project Manager started in August 2007 by preparing a detailed project plan and presented it to the Management Team for review. The Management Team agreed the plan and the project moved to the next stage – implementation.

Implementation

The first task was to raise awareness of the project. In addition to emailing academic staff directly, this was done through the Library's newsletter, the website and the Library's space on Moodle, the University's virtual learning environment (VLE).

The next few months were spent researching and putting procedures in place. At this point, it was decided to run a pilot in parallel with other solutions. The Sociology Department was chosen because of the number of students served by the department and its proactive relationship with the Library.

Each procedure is documented in detail. This is vital for training existing and new staff, for keeping track of progress and for future evaluation. Diagram 2 gives an indication of the resulting workflow.
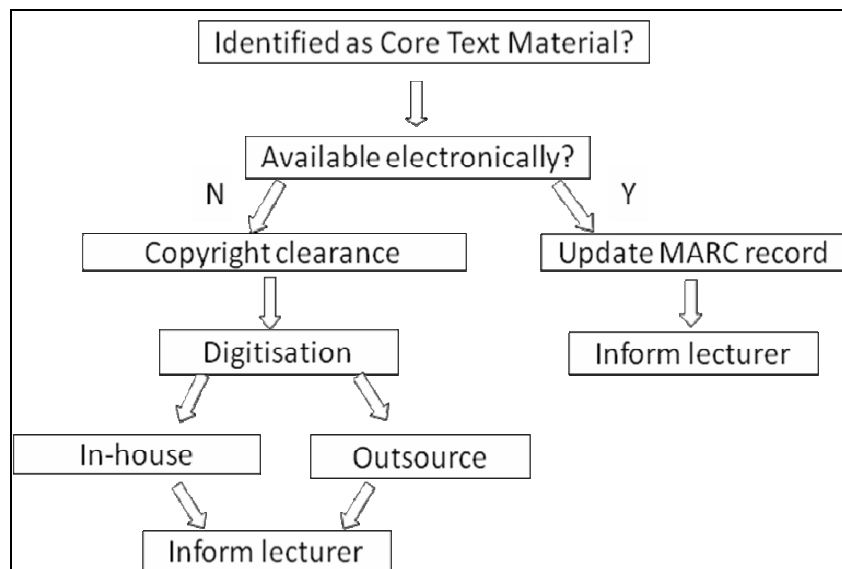

Diagram 2 – Workflow

1) Identifying core text material
During the scope of the project, core text material was defined as material that students are required or expected to read. This definition excludes other additional recommended reading. Core text material is identified from 4 sources:
- all new material added to the Reserve and Short Loan Collections
- a list of material identified as core text compiled by the Sociology Department[8]
- new book orders submitted by academic staff identified as core text via a tick box added to the order form
- the existing Reserve Collection

2) Sourcing material electronically
Once material is identified as core text, the next step is to source the material in electronic format. The following resources are searched:
- the Library's subscribed databases of full-text electronic resources

- the University's institutional repository
- databases of electronic material that are freely available
- database catalogues[8]

If the print version is already held by the Library, a persistent link is added to the 856 field (electronic location and access) in the catalogue record. Otherwise, a catalogue record is imported or created.

3) Copyright clearance

If material is not readily available in electronic format, copyright clearance to digitise is sought via the Digital Extension to the Irish Copyright Licensing Agency's Higher Education Licence[9] or directly from publishers. Due to the current limitations of the digital licence, copyright clearance is more often sought directly from the publishers.

Typically, this involves a copyright fee based on the number of students that need access to the material, the number of pages involved and the length of time for which the material is required. In situations where copyright clearance is denied, most copyright holders are willing to allow between 10% and 20% of the material to be digitised.

4) Digitising the material

The next step in the process is digitising the material. Material less than twenty pages is scanned in-house, otherwise it is outsourced. In both incidences, the material is scanned at a resolution of 300 dots per inch. The text is converted to searchable text using optical character recognition (OCR) and the file is saved in portable document format (PDF).

When the material has been scanned, a template is inserted at the start of the PDF file giving bibliographic details, module and lecturer details and any appropriate credit lines or copyright notices that need to be included. For example, "Reproduced with permission of…" or "The download of this file is intended for the user's own and personal and non-commercial use…".

Using LEFT, free software to facilitate data transfer, the file is sent to the lecturer for uploading to the module space on Moodle. Access to the material is only available to the students registered for the relevant module. This fulfils the terms under which permission is granted to digitise the material.

Evaluation

There are now over 200 core text items available electronically. Of these, 32% are books, 35% are chapters and 33% are journal articles.

Costs for the project consist of three main factors: the subscription fee, the copyright and digitisation fees and staff resources. Some examples:
- Subscription fee – the average cost of a book sourced through NetLibrary is £78/€100
- Copyright clearance fee – an average is the £130/€165 charged for a chapter of 22 pages for 191 students. The cheapest to date has been £55/€70 for a book of 422 pages for 30 students. The most expensive has been £2,040/€2,590 for a book of 399 pages for 95 students. Needless to say, this book did not get past this stage!
- Digitisation fee – the in-house costs are the staff time involved. Outsourced digitisation is charged at 9p/12c per page per bound item and 6p/8c per page per unbound item. This includes the unbinding and rebinding.

Diagram 3 illustrates the comparative costs based on a chapter that was digitised in-house (£180/€230), a book that had its digitisation process outsourced (£102/€130) and a book that was available electronically (£78/€100).
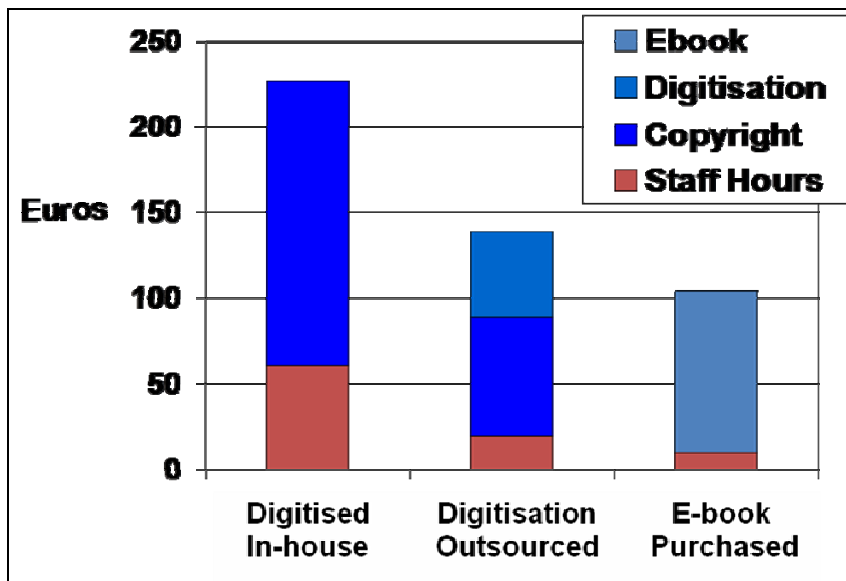
Diagram 3 – Comparative costs

Overall, feedback has been very positive. The usage reports available from Netlibrary are indicating a high level of usage. Academic staff is reporting that material on Moodle is being used at all times of the day, night, and week.

> "Easy and open access to essential readings
> will greatly improve lecturers' ability to design innovative courses
> and will provide students with a greater range of readings
> and of ways to get access to them."
> (Prof. Sean Ó Riain, Department of Sociology)

Students are using the Library's facility to download this material to their MP3 players. Having the material accessible electronically is offering greater flexibility for users with disabilities.

> "It ties in well with the culture and expectations
> of our talented and tech savvy I-Pod generation students."
> (Mr Tom Mulvey, Department of Business and Law)

Library staff is also pleased with the development opportunities this project has provided. In addition, the Library's profile has been enhanced, particularly amongst academic staff.

Before the project concludes, the following areas need to be investigated:
- A more reliable procedure for uploading files to Moodle
- A link from the catalogue to Moodle
- Collection maintenance procedures
- Better usage statistics
- Feedback from users
- More sources for e-books
- A final report with recommendations for the future of the service

Future of the service

Some of the issues the final report is likely to highlight include:

- Integration with other library functions – being more proactive about ordering electronic versions of books forces the Library to examine its existing collection development policies and procedures. It needs to consider whether the priority is to purchase electronic rather than print. As part of the project, individual catalogue records are imported or created for electronic books. This is currently at variance with material purchased as a package via a database provider
- Staff resources – already staff have been restructured to provide additional resources to the project. This may need to be sustained in order to maintain and develop the service
- File formats – alternative formats may need to be considered as PDF is not the most suitable format for anyone wishing to convert files to make them more accessible for their particular needs or to download files to mobile phones and i-Pods
- Storage – while there is currently adequate storage space on Moodle, if the amount of material provided via Moodle grows considerably, extra storage space will need to be investigated
- Raised user expectations – this project seeks to address user expectations in the provision and access to core text materials. The current set of user expectations are likely to shift and will need to be addressed. Web 2.0 technology could play a vital role in enhancing and adding value to the service
- Usage patterns of e-books - the outcome of the JISC national e-book observatory project[10], which aims to understand how e-books are being used, and other research in this area, are likely to influence the future direction of the service. For example, some subjects, such as Law, rely very heavily on print material regardless of electronic availability
- Copyright and digitisation – the expected expansion of the Irish Copyright Licensing Agency's license for digital material will change the cost/benefit analysis ratio regarding material requiring digitisation. In addition, as more and more material becomes available electronically, there may be less need to digitise and a reliance on a service such as HERON[11] could become more attractive
- Collaboration – there is potential to explore and develop collaborative partnerships between libraries, suppliers, copyright agencies and professional bodies both in Ireland and internationally

Conclusion

From the project management perspective, the importance of the scoping stage cannot be emphasised enough. It is essential for clarity of vision, a vital ingredient in a successful outcome. As Abraham Lincoln is quoted as saying "Give me six hours to chop down a tree and I will spend the first four sharpening the axe".[12]

Answering the question – "is this project worthwhile?", the response is very definitely "yes". It is succeeding in achieving its aim and objectives and ultimately addressing the needs of the students and fulfilling expected outcomes. Furthermore, it has the potential to develop into a key and valuable service for the foreseeable future.

Acknowledgements

References and notes

1. All costs are rounded. Currency calculations are based on exchange rates on 28 April 2008
2. *Strategic Innovation Fund: Call for proposals,* Higher Education Authority, Dublin, 2006. http://www.hea.ie/index.cfm/page/sub/id/1174 - accessed 16 February 2008.
3. *The Library Strategic Plan 2006-2008*, p.9. http://library.nuim.ie/about/publications.shtml
4. Neligan, Agnes, *Outline proposal – reading strategy for students*, 16 May 2006 (internal document)
5. *NUI Maynooth Teaching & Learning Strategy*, March 2007. http://qpo.nuim.ie/teaching/index.shtml
6. *University Strategic Plan 2006-2011.* http://corporateservices.nuim.ie/
7. The Reserve Collection is essential reading that is available for loan for 3 hours in the Library. The Short Loan Collection is essential reading that is available for loan for 2 days or a week
8. A substantial number of core text books have been sourced through NetLibrary, an OCLC database. The advantages of NetLibrary are that
   - Libraries can subscribe to specific titles rather than a subject set
   - The MARC record for each subscribed title is included
   - Access if for 5 years which is perfect for core text material
   - A range of usage reports are available
   A disadvantage is NetLibrary's policy of one simultaneous user
9. Irish Copyright Licensing Agency, *Higher Education Licence: digital extension.* http://www.icla.ie/index.php?education_highereducation – accessed 24 April 2008
10. *JISC national e-books observatory project.* http://www.jiscebooksproject.org/
11. HERON is a copyright clearance and digitisation service. http://www.heron.ingenta.com/
12. Lincoln, Abraham. http://workinghumor.com/quotes/education.shtml - accessed March 2008