



**Consortia Collaborating on a Platform for Library Usage Statistics**



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# Background

- Consortia and libraries invest heavily in licensing electronic resources for their users, and usage data is a critical piece of understanding their value.
- A 2014 ICOLC survey of 45 consortia worldwide demonstrated a need and willingness to collaborate on shared challenges with the collection, processing, and storage of usage data.

# What Makes This Work Difficult?

- Usage is most useful at the per title, per institution, per month level. This generates A LOT of detailed data quickly, especially for consortia.
- Credentials are required to obtain the data, but getting correct credentials is easier said than done.
- Information providers make mistakes.
- Usage data often needs entitlement context to be meaningful.
- The power of the data is in trends over time, and this has been complicated by changes in the COUNTER standard.

# COUNTER and Consortial Reporting

- Consortium Reports were removed in Release 5. Standard retrieval mechanisms also needed to change with the SUSHI move from XML to JSON.
- Attempts by COUNTER to create a tool for Release 5 consolidated reports have struggled.
- In 2020, COUNTER added an optional mechanism for information providers to create Consortium Reports by extending COUNTER Master Reports.

# CC-PLUS Goals

This project will result in an open source, shareable platform that will:

1. Increase libraries' and consortial analytical capacities;
2. Create staffing and cost efficiencies;
3. Empower consortia and libraries to make informed decisions about their investments.

# IMLS-funded Initiative

2017 PALCI and partners received \$50k from IMLS's National Leadership Grant for Libraries to build a prototype system for harvesting, ingesting, validating, storing, and displaying usage data.

2018-21 PALCI and consortial partners received \$247,500 to build a production-ready open source software aimed at gathering library usage statistics that would scale to support consortia.

2021: SCELC and consortial partners have submitted a proposal for a third round of IMLS funding.



**PROUD #IMLSGRANT RECIPIENT!**

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# CC-PLUS Advisory Board & Project Team

Jill Morris – PALCI, Project Director

Gretchen Gueguen – PALCI, Project Coordinator

Anne Osterman – VIVA, Project Communications Lead

Scott Ross – Application Developer

Sarah Dooley - UX Developer

Ivy Anderson & Nga Ong – California Digital Library

Lorraine Estelle - COUNTER

Pam Jones – ConnectNY

Tejs Grevstad – ConsortiaManager

Thomas Porquet & Thomas Jouneau – Couperin (France)

Jason Friedman – CRKN (Canada)

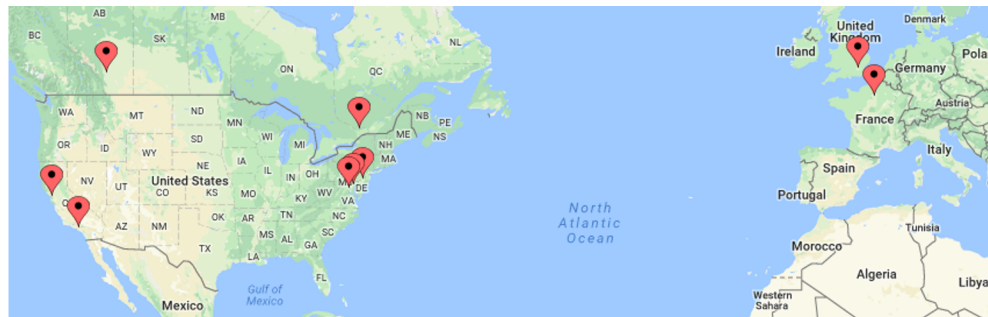
John Stephens – GALILEO

Jo Lambert – Jisc (UK)

Joanna Voss – OhioLINK

Chuck Thomas, Randy Lowe, & Erica Owusu – USMAI

Jason Price – SCEL



# Product Management Team

- Gretchen Gueguen – PALCI, Project Coordinator; Co-chair
- Scott Ross – Application Developer
- Nga Ong – CDL
- Sarah Probst – ConnectNY; Co-chair
- Thomas Porquet – Couperin
- Émilie Lavallée-Funston – CRKN
- Ken Henslee – GALILEO
- Paul Meehan – Jisc
- Joanna Voss – OhioLINK
- Jason Price – SCEL
- Erica Owusu – USMAI
- Bobby Reeves – VIVA



# What Can CC-PLUS Do?

- Harvest COUNTER R5 reports automatically, usually on a monthly basis, via the SUSHI protocol.
- Store this complex data in a database, organized by information provider and institution.
- Create customized report outputs, including combining metrics from different report formats.
- Allow for multiple levels of user access and collaborative management.

# Pilot Phases

- The first pilot took place in May to October 2020. Including both North American and European consortia, it tested the system's basic operations, identified issues and documentation needs, and sought feedback on the most common reporting needs.
- The second pilot started in January 2021 and is ongoing. It is focused on operating with the system at scale and documenting standard practices, including beginning to create structures for consistent feedback to information providers.

# Viewing the Software

To see a demo of the software, please view the recording of the November 20, 2020 presentation:  
<https://www.cc-plus.org/presentations/>

# Planning for the Third Grant

- The overarching goals of the third phase of this project, should it be funded, are to reduce barriers to adoption of the software and build a community to sustain the program into the future.
- There are two major areas of work: technology and community.
- The project will be seeking three new volunteer roles: Product Owner, Technical Lead, and Community Organizer.

# Success: A Functional Product

- CC-PLUS has built a software package that fulfilled the goals of the project.
- The extended grant funding, which enabled dedicated staffing for this work, was essential to this success.
- Partnerships among consortia and with external organizations have also been critical to the success of CC-PLUS.




# Challenge 1: We Are Similar But Not the Same


- Alignment to the ICOLC mission going forward will be critical, but this is easier said than done because consortia have a wide variety of needs and approaches.



Is there an API?



Can it handle  
non-COUNTER  
data?



Can you host the  
service?

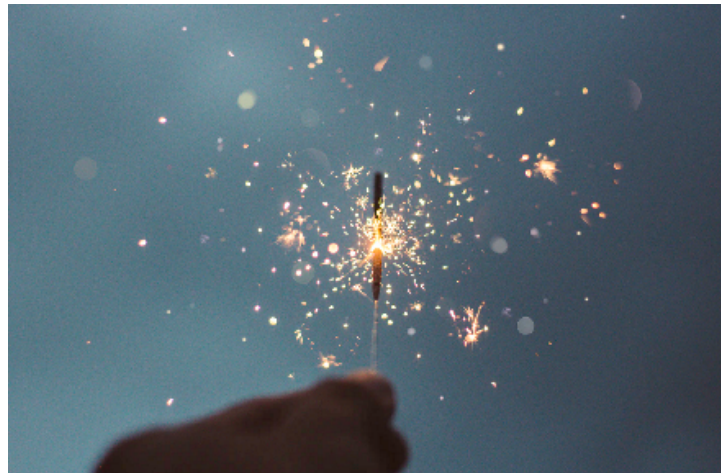
# Challenge 2: Sustainable Governance

- Although external partners have been critical to the project's success, it has been difficult to find the right relationship fit going forward.
- Could there a partnership to sustain interest in this project as well as others, such as a Library Data Alliance?
- The LYRASILS It Takes a Village project will be helpful in building sustainable governance.



# A Magic Wand: Automatic Software Updates

- The need for this product will continue for years to come, but it will need to keep pace with changing technologies and the evolving COUNTER standard.
- Removing the pressure of active code development would be transformative, but since it is also impossible, the community needs to prepare for investment.
- When the project moves past grant funding will be an especially critical point for the community to step up and keep the software usable.





# The Future of CC-PLUS Depends On -

- A strong community, both within libraries and with relevant external partners.
- Sustained investment in maintaining the code and keeping it relevant.
- Workable funding models to extend the service to those that cannot enable it in-house.

