

Report on the NSDL Pathways' Evaluators Meeting

3-4 August 2006, Boulder, CO

Prepared by Sarah Giersch, 24 August 2006

Executive Summary

This report of the NSDL Pathways Evaluators meeting contains key points from presentations and discussions, recommendations from the report out to Pathways PIs, and next steps.

The motivation for a meeting specifically for NSDL Pathways Projects evaluators grew from a need expressed by the evaluators to know more about one another's work and to learn about the Omniture web metrics tool and how best to take advantage of it for their sites. The meeting leveraged ongoing joint activities of the Education Impact and Evaluation Standing Committee (EIESC), of which several pathways' evaluators are members, and NSDL Core Integration (CI) to learn about evaluation activities across NSDL.

The evaluators met separately on August 3; discussion and presentations covered the following topics: issues around implementing and reporting data collected with Omniture; common research questions and data collection methods around which pathways evaluators could collaborate; strategies to report the results of the evaluators meeting to the EIESC and NSDL community and to carry forward the ideas generated in the meeting. On August 4, the evaluators joined the Pathways PI's to report and discuss recommendations (summarized below) formulated at the meeting.

Summary of Recommendations & Questions

Recommendations from the Pathways' Evaluators

- 1) Agree on common categories for reporting Omniture results
 - a) Report NSDL usage at the programmatic level
 - b) Develop a checklist to ensure Omniture is correctly implemented
- 2) Align privacy policies with regard to implementing Omniture (and other server log tools) to meet local institutional IRB requirements
- 3) Find common tools to effectively capture data about user satisfaction
 - a) Explore proof of concept plan for developing a common user satisfaction survey based on ARL pilot study
 - b) Explore user panels as a method for gathering data from a large set of DL users
- 4) Present results at the NSDL Annual Meeting; Proposed Sessions
 - a) Overview of Omniture by Mick and Bob
 - b) Report out on Survey of Evaluation efforts by CI / EIESC and results of this meeting
 - c) EIESC meeting: Follow-up on previous sessions and develop action plan
- 5) Initiate a secure listserv for Pathways evaluators to share evaluations questions and results

Further questions from Pathways' PI's

- 6) How does Omniture arrive at the results it generates via the Site Catalyst interface?
- 7) Is there a way to use Omniture to collect metrics around features or services of sites?
- 8) As part of Recommendation 3.b. (develop a user panel), survey PIs to learn about the "classes" of users that projects would like to know about.

The small size of the Pathways evaluators group made it relatively easy to convene a meeting quickly; however, it also means that there are fewer people to share the work of implementing these recommendations. Due to the possibly extensive and collaborative work required for some of the recommendations, a reasonable initial action item is to develop a project plan. By listing the activities and properly scoping (and budgeting) them, we can identify where pathways evaluators (and PIs) can combine efforts to benefit all of the Pathways projects. The action items listed below are mapped directly to the recommendations; the numbers in front of items correspond to recommendations. The person associated with the activity is the lead, though it is anticipated that a detailed project plan will indicate opportunities for everyone to participate.

Action Items from the Pathways' Evaluators Recommendations

Short term (Aug 7 - Sept 8)

- 5) Set up a listserv for Pathways evaluators: Josh Morrill - DONE
- 4) Report meeting results to EIESC leadership: Flora McMartin - DONE
- Write report of Pathways evaluators meeting: Sarah Giersch - DONE
- Distribute meeting report to NSDL CI, Pathways PI's, EIESC: - DONE
- Distribute presentation slides to listserv: Mick Khoo, Bob Donahue - DONE
- Distribute NSDL CI privacy policy to evaluators listserv: Mick Khoo - DONE
- Discuss common categories to collect data about using Omniture: All
- 6, 7) Begin following up on PI questions about Omniture: Mick Khoo

Near term (Sept 9 - Oct 17)

- 1b) Develop a checklist to ensure Omniture is implemented correctly: Mick Khoo, Bob Donahue
- 2) Provide advice on privacy policy alignment: Mick Khoo
- 4a, b, c) Coordinate sessions for the NSDL Annual Meeting: Mick Khoo, Bob Donahue (Omniture session); Flora McMartin, Laura Bartolo, Anne Diekema, Mick Khoo (EIESC/CI survey and evaluators meeting report session)
- 3b, 8) Develop a project plan, timeline and budget to explore convening user panels for evaluation: Josh Morrill
- 3a) Develop a project plan, timeline and budget to develop a user satisfaction survey based on ARL survey: Sarah Giersch

Annual Meeting

- Send updates for reporting out to Mick Khoo and Sarah Giersch by Oct 1
- Find a time for Pathways evaluators to meet and update one another on project work, to-do progress and plans going forward

The pathways' evaluators would like to thank their Pathways PIs and NSDL Core Integration, especially Donna Cummings and Eileen McIlvain for organizational help, for hosting this meeting and for providing some travel support.

Meeting Attendees: Evaluators, Pathways Projects*

- Flora McMartin: BEN, ComPADRE, Math Gateway
 - Josh Morrill: AMSER, CSERD
 - Sarah Giersch: MatDL
 - Denise Carlson: Engineering Pathway
 - Daniel Knight: Engineering Pathway
 - Bob Donahue: Teacher's Domain
 - Shelley Pasnick: Teacher's Domain
 - Mick Khoo, NSDL CI Evaluator
- *Note: the new Pathways project did not have an evaluator selected at the time of the meeting

Summary, Recommendations & Discussion

The agenda for the evaluators meeting was divided into three parts around the topics of Omniture, project evaluation plans, and reporting on results, but there were many overlapping issues that cumulatively led to the recommendations. Rather than give a blow-by-blow recitation of a very circuitous discussion, the report is organized around the topics' anticipated outcomes, a brief summary of events, followed by a discussion of the recommendations.

Omniture

Anticipated Outcomes

- Develop a basic understanding of the Omniture web metrics package in the context of its current use by NSDL Core Integration and individual Pathways projects.
- Identify ways Omniture might be used to explore evaluation questions, data collection and reporting methods common to all of the Pathways projects.
- Identify a minimum set of web metrics common to the Pathways projects.

Summary

Mick Khoo (NSDL CI) began the meeting with an Introduction to Webmetrics presentation based on his experience implementing Omniture for NSDL Core Integration (CI). The discussion was lively as Mick touched on questions that were of interest to everyone, specifically, the type of data Omniture collects, how it collects data, how it defines data elements and what NSDL CI is collecting. Slides from all the presentations will be posted at the Core Integration Evaluation wiki, maintained by Mick Khoo (<http://eval.comm.nsd.org/>). Bob Donahue (Teachers' Domain, WGBH) then followed with a presentation on how WGBH has been using Omniture data. Bob's presentation gave concrete examples of several of the caveats Mick defined. Finally, Mick gave another presentation about how NSDL CI is using Omniture data. After a far-ranging discussion on identifying users and tracking usage, we broke for lunch at the UCAR cafeteria.

Recommendations & Discussion

- 1) Agree on common categories for reporting out Omniture results
 - a) Report NSDL usage at the programmatic level
 - b) Develop a checklist to ensure Omniture is correctly implemented

Once the evaluators understood how Omniture defines visits, hits, page views, etc., and, generally, how those metrics are calculated, it was relatively easy to agree that pathways evaluators should collect web traffic about projects at the level of a visit. We sidestepped the issue of gathering consensus to report visits on a project-by-project basis. However, we did agree that reporting usage at the NSDL-wide level was important, which would mean reporting aggregate numbers from all of the Pathways using the Omniture tool, even though many Pathways planned to continue using additional server log tools.

Arriving at one or two top-level numbers that indicate site traffic is not a simple process. One of the biggest challenges includes implementing Omniture correctly, and broadly enough, on Pathways projects sites in order to correctly reflect the traffic on the sites. This led to the recommendation to develop a checklist around Omniture implementation. We envision this list as something that will be useful to evaluators and to the technical people who will be responsible for placing the javascript on Pathways' websites.

This is somewhat of a chicken-and-egg recommendation in that while the evaluators (and PIs) may agree on common categories for reporting out Omniture results, until Omniture is correctly implemented (a la the checklist) and tested for a while, only then can we begin to report usage at the programmatic level. We can take steps towards implementing this recommendation, but it may be months before we see, and report, results.

- 2) Align privacy policies with regard to implementing Omniture (and other server log tools) to meet local institutional IRB requirements

There are two elements to this recommendation: aligning privacy policies across Pathways' project and meeting local IRB requirements for conducting evaluations. NSDL CI has already spent considerable time developing a privacy policy that is in keeping with their use of Omniture on NSDL.org. Mick offered to share the privacy policy with Pathways evaluators as boilerplate that can be modified as necessary based on individual Pathways implementation of Omniture. In the bigger scheme, it is also necessary to have closely aligned privacy policies across Pathways projects so that as the community sign on service (based on the Shibboleth technology) makes moving across NSDL and Pathways sites seamless, users can be guaranteed a standardized level of privacy.

Regarding IRB (institutional review boards) some evaluators were submitting evaluations plans for approval by university IRB panels; others were not. Having a privacy policy in place, as just one of the many pieces of documentation needed for IRB approval, will help Pathways evaluators prepare their cases for IRB. The NSDL CI privacy policy is still in the process of being finalized; this recommendation serves to raise its profile in order for the necessary conversations to occur to conclude the policy development process. Immediate action on this recommendation will be taken by projects that are in the process of seeking IRB approval. In the near to long-term, Mick may work individually with Pathways evaluators and PIs as privacy policy questions arise, and the issue of aligning privacy policies will be re-visited early in 2007.

Evaluation Plans

Anticipated Outcomes

- Share Pathways' evaluation work to date including plans, methodologies and tools.
- Identify common research questions and methods in order to leverage evaluators' instruments and expertise

Summary

After lunch the discussion turned to projects' evaluation plans, of which Omniture is just one tool for data collection. In preparation for the meeting, attendees were asked to submit the high-level questions that are part of their evaluation plans, the tool(s) they plan to use to collect data for those questions, and whether they thought the questions were formative, summative or both. The chart below shows the distribution of effort across areas of evaluation based on a count of the tools being used for data collection. After this discussion, we had a chance to play in the Omniture "sandbox" before re-convening to identify recommendations and action items from the day and to discuss how to report out this meeting to Pathways PIs, the EIESC, and the NSDL Community and how the evaluators could continue to work with one another going forward. By the time we re-convened for drinks, the rain had blown over, so we took a nice stroll up Boulder Creek path for bevies at the Corner Bar, followed by a scrumptious supper at the Dushanbe Tea House.

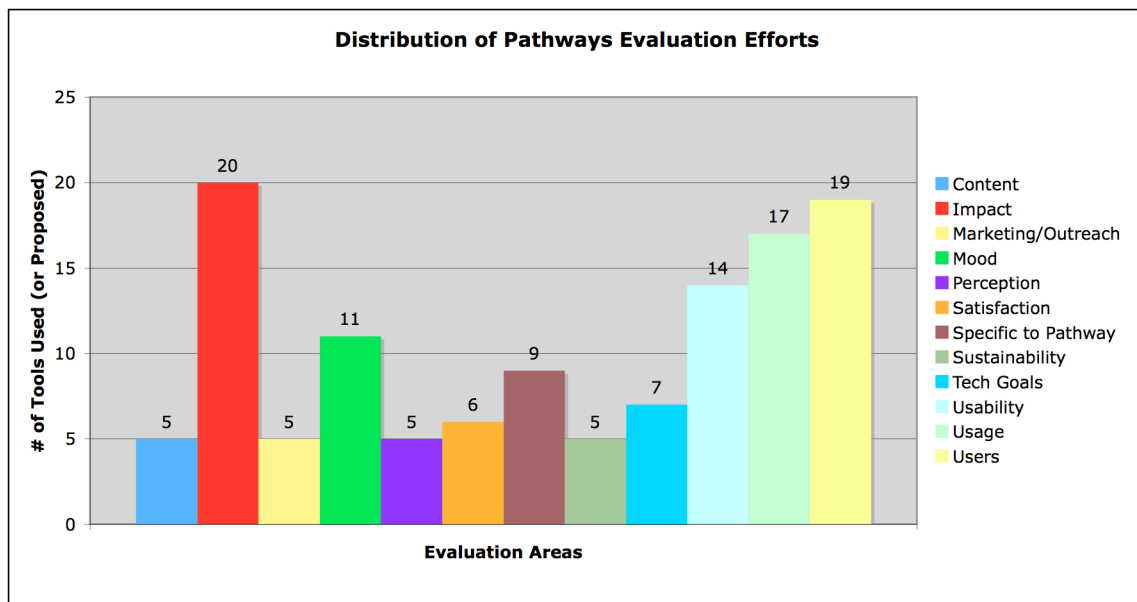


Figure 1

Recommendations & Discussion

- 3) Find common tools to effectively capture data about user satisfaction
 - a) Explore a proof of concept plan for developing a common user satisfaction survey based on ARL pilot study
 - b) Explore user panels as a method for gathering data from a large set of DL users

As Figure 1 indicates, the evaluation areas where Pathways are allocating most of their effort are:

- Impact - Education Impact of the Site, Service, Tool, Content - 20 tools;
- Users - Identifying Audience Segments, Audience Needs - 19 tools;
- Usage - Tracking Usage of the Site, Service, Tool, Content 17 tools; and,
- Usability - Interface Design, Site Functionality, Accessibility - 14 tools.

One interpretation is that several motivating factors have forced Impact to the top of the list, including NSF's solicitation requirements to demonstrate broader impacts, the No Child Left Behind Act, which emphasizes summative, experimentally based demonstrations of impact on a programmatic scale, and the emphasis within NSDL, particularly through the Education Impact and Evaluation Standing Committee, to identify the impact digital libraries have on education, broadly, student learning (the holy grail) and most recently, changes in teacher pedagogical behavior with regard to online STEM resources. A quick review of the EIESC website indicates that it is not for lack of trying that a unified approach to identifying impact has not been created. In fact, the various workshop and pilot projects highlight that impact and the next two items, identifying users and tracking usage, are also chicken-and-egg issues. NSDL-funded projects have been particularly challenged to identify users because education digital library users are online and tend to remain anonymous due to digital libraries' privacy policies and minimal registration requirements, hence the need for Omniture. But I digress.

The Pathways evaluators have made contact with users in various ways, most often around activities associated with usability, which is fourth on the scale of allocated effort. Everyone agreed that identifying users is the most difficult portion of these evaluation activities, and we agreed that previous methods were not adequate. Josh Morrill gave a summary of evolving industry trends in surveying users:

Many commercial research entities (i.e., Gallop, Zogby, Gartner) have started to find that general data collection via surveys, either by phone or email, are becoming increasingly unreliable due to factors such as

- Increased use of cell phones as a primary contact
- User fatigue due to the ubiquity of email surveys, and
- Increases in users' expected compensation for surveys.

Additionally, this data has systematic gaps, particularly among younger demographics. Therefore, in lieu of dramatically increasing randomized sample size, many companies are starting to use controlled panels of survey respondents to solicit more representative results. These panels are carefully constructed to reflect demographics of interest in order to achieve representative findings, and they are compensated for their continuing participation. It may be time for NSDL to consider constructing a large panel that could be used for Pathways projects and other NSDL assessments.

In light of Josh's observations, our experiences with recruiting users for evaluations, and the ongoing need to conduct evaluations, we recommended exploring how to convene a panel of users who would be representative of NSDL projects' users groups and who could be called upon to participate in evaluations. Think of it as a large, on-call focus group. Of all of the recommendations, this is certainly the most experimental and will require a great deal of coordination and some support. Expect a project plan around this, which includes a feasibility study.

In the course of discussing usability and identifying users, Sarah Giersch (MatDL) showed the group the DigiQUAL survey (www.digiqua.org) developed by the Association of Research Libraries as part of an NSDL-funded project in 2002-2004. After explaining the survey development process, pilot testing challenges and lessons learned (documented in papers from JCDL 2005 and JCDL 2006), the group agreed that the survey tool coincided with Pathways' plans to gather data from users about their satisfaction and functionality regarding Pathways' sites. The group liked the

idea of building on the ARL survey and refining it for their needs rather than starting from scratch. This recommendation will also require a project plan and some support, but the evaluators were committed to coming up with a good tool.

These recommendations are somewhat of a circuitous route towards impact, but should benefit all the Pathways and get us a few steps closer.

Reporting Out to the EIESC and NSDL Community

Anticipated Outcomes

- Formulate goals and recommendations for reporting the results of this meeting (potentially at the NSDL Annual Meeting, at an NSDL-wide evaluators' meeting, in a *D-Lib* article).

Summary

As we discussed how to report out results to the NSDL Community, the NSDL Annual Meeting seemed like a natural place to begin. Several evaluation sessions were submitted in response to the NSDL Annual Meeting Planning Committee's call for proposals by Mick, Bob, Flora and Sarah. The evaluators decided that if these sessions were accepted by the Planning Committee we would coordinate on the content to ensure that the topics from the Pathways evaluators meeting were fully reported. The remaining item, then, was to plan the following day's report to the Pathways PIs, provided by Flora McMartin. The agenda reflects the changed order of presentations, and Flora's slides are included here (<http://eval.comm.nsd.org/>).

Recommendations & Discussion

- 4) Present results at the NSDL Annual Meeting; Proposed Sessions
 - a) Overview of Omniture by Mick and Bob
 - b) Report out on Survey of Evaluation efforts by CI / EIESC and results of this meeting
 - c) EIESC meeting: Follow-up on previous sessions and develop action plan
- 5) Initiate a secure listserv for Pathways evaluators to share evaluations questions and results

As noted in the introduction, the Pathways evaluators meeting complements ongoing work by the EIESC and the NSDL CI, whose specific joint activity for 2005-06 has been to survey all NSDL projects on their evaluation activities and to provide a place and format where projects can share not just results, but tools and methodologies, too. The Pathways evaluators did not want to supplant the EIESC structure, mission or ongoing activities, but they also realized that the groups might have overlapping agendas. The evaluators committed to reporting out the results of this meeting at the NSDL Annual Meeting and via the EIESC listserv. Flora McMartin, EIESC Co-Chair and Pathways evaluator (BEN, ComPADRE, Math Gateway) will take the lead on keeping both groups informed.

Although the Pathways evaluators considered using the EIESC listserv to discuss the activities proposed here (the better to keep the NSDL community informed), we decided that a dedicated, private listserv would be a better tool so that we would feel

secure in sending around sample data and tools. Josh Morrill (AMSER, CSERD) has offered to host this listserv.

One item not reflected in the recommendations, but which received some discussion, was Mick's request for the evaluators to share the results of their evaluation activities in a coherent, circulate-able format. He has made a similar request of all NSDL projects, and the EIESC / CI survey is an attempt to gather those reports. The group noted that it would be easier to provide those reports if Mick had a specific template. We stopped before digressing too far on the pro's and con's of template development and thinking of the elements to report. However, Mick's request should not be overlooked and will be included in the final list of action items. *Don't wait to write up the results of project evaluations until they are journal-worthy; send Mick a 2-4 page overview when there is something to report.*

Report to the Pathways PI's

Anticipated Outcomes

- Report to the Pathways PIs a summary of this meeting, noting possible synergies, recommendations and questions to consider regarding Omniture and other evaluation activities.

Summary

Mick, Bob and Flora did an excellent job of reporting on Omniture basics, how it is used and the recommendations from the evaluators meeting. The PI's were generally receptive to the idea of using Omniture and of the Pathways evaluators continuing to work with one another. The PIs emphasized that the EIESC and NSDL Community should be apprised of ongoing Pathways evaluators' activities, and approved the plan of regular reports to the EIESC listserv and potential sessions at the NSDL Annual Meeting. Kaye Howe tasked Mick to be the point person on coordinating Pathways evaluators' activities.

Questions & Discussion

The PIs also suggested additional questions or avenues for research, which the Pathways' evaluators will follow-up accordingly. These included:

- 6) How does Omniture arrive at the results it generates via the Site Catalyst interface? This has implications if Omniture decides to change how it logs and analyzes web traffic. Also, there was a request to know what happens with Omniture data in the future. Some of this information is available in the NSDL CI privacy policy. However, further efforts will be made to answer these questions and make the results more widely available.
- 7) Is there a way to use Omniture to collect metrics around technical features or services of sites?
- 8) As part of Recommendation 3.b. (develop a user panel), survey PIs to learn about the "classes" of users that projects would like to know about.

The meeting concluded with thanks to the CI for supporting the organization and some travel costs of the Pathways evaluators and for hosting the meeting at the UCAR offices. Everyone enjoyed a post-meeting lunch at The Kitchen.

Next Steps for the Pathways' Evaluators

The small size of the Pathways evaluators group made it relatively easy to convene a meeting quickly; however, it also means that there are fewer people to share the work of implementing these recommendations. How some of the activities below will be accomplished is uncertain; collaboration can sometimes be an un-funded initiative. Due to the possibly extensive and collaborative work required for some of the recommendations, a reasonable initial action item is to develop a project plan. By listing the activities and properly scoping (and budgeting) them, we can identify where pathways evaluators (and PIs) can combine efforts to benefit all of the Pathways projects. The action items listed below are mapped directly to the recommendations; the numbers in front of items correspond to recommendations. The person associated with the activity is the lead, though it is anticipated that a detailed project plan will indicate opportunities for everyone to participate.

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- Distribute presentation slides to listserv: Mick Khoo, Bob Donahue
- Distribute NSDL CI privacy policy to evaluators listserv: Mick Khoo - DONE
- Discuss common categories to collect data about using Omniture: All
- 6, 7) Begin following up on PI questions about Omniture: Mick Khoo

Near term (Sept 9 - Oct 17)

- 1b) Develop a checklist to ensure Omniture is implemented correctly: Mick Khoo, Bob Donahue
- 2) Provide advice on privacy policy alignment: Mick Khoo
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Further questions from Pathways' PI's

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- 8) As part of Recommendation 3.b. (develop a user panel), survey PIs to learn about the "classes" of users that projects would like to know about.

Appendix

Meeting Agenda

8:30-9:00	Introductions, Meeting Goals, Scope & Outcomes (Sarah Giersch)
9:00-9:20	Overview of Omniture (Mick Khoo) How the CI/Pathways are currently implementing it, potential uses, plans.
9:20-10:00	Omniture Use Cases & Reflection Use cases address: research questions supported by web metrics; where web metrics fit into a bigger project evaluation plan; what data are reported, how and to whom; how the data are used. Use Case 1 (10 min): WGBH (Bob Donahue) Use Case 2 (10 min): Core Integration (Mick Khoo) Reflection (10 min): (All) How are these use cases relevant to my project? What additional uses do I see for Omniture and web metrics in my project? What are the questions I'd like answered in the next session?
10:00-10:10	Break
10:10 – 11:10	Omniture in Depth (Mick Khoo) <ul style="list-style-type: none"> • Show and tell: collecting data, generating reports • Resources for learning how to use Omniture • Defining metrics

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	<ul style="list-style-type: none"> • Other questions from Reflection • Next steps for follow-up
11:10 – 12:00	<p>Review & Discuss: Summary of Project Information on Web Metrics (from survey of evaluation questions/tools/type of evaluation completed prior to meeting)</p> <ul style="list-style-type: none"> • What types of questions will projects answer with web metrics? • How will the data be used? Other trends? • What kinds of overlap or synergies might exist among the Pathways and the data collected?
12:00-1:00	<p>Lunch, UCAR cafeteria Networking; or, depending on the noise level, we could give brief overviews of our projects</p>
1:00-2:00	<p>Taking stock of the fruit basket</p> <ul style="list-style-type: none"> • What web metrics are we collecting individually that could be reported collectively? Would the data be reliable? What difference would it make? • What questions could we all agree to try to answer (or metrics could we agree to collect) with Omniture? When? Data-collection issues? Reporting issues? • What can't we answer with Omniture?
2:00-3:15	<p>Review & Discuss: Summary of Pathways Evaluation Activities (from survey of evaluation questions/tools/type of evaluation completed prior to meeting)</p> <ul style="list-style-type: none"> • Is anything missing from the activities summary? • How do we plan to answer non-web metric evaluation questions? • What are the common evaluation questions and tools? • How can we help one another? What is the value of collaboration or coordination of efforts? • Where are there synergies in timeline, effort, methodology and tool creation?
3:15-3:30	<p>Break</p>
3:30-4:00	<p>Brainstorm:</p> <ul style="list-style-type: none"> • How will we share what we have learned with other NSDL projects? • What more can this data be used for? NSF reporting? Research articles? Business cases? • What will the Pathways be able to say with their evaluation data at the end of funding?
4:00-4:30	<p>Identify Contents of Report to the PIs (Friday morning)</p> <ul style="list-style-type: none"> • Synergies • Recommendations • Questions
4:30-5:00	<p>Reflections</p> <ul style="list-style-type: none"> • Observations

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	<ul style="list-style-type: none"> • Outstanding questions • Listserv to carry on discussion?
6:30-7:00	Drinks on Pearl St.
7:00	Dinner as a group

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8:15-8:30	NSDL Webmetrics: An Introduction (Mick Khoo)
8:30-9:00	Highlight current use and potential of Omniture (Bob Donahue)
9:00-9:30	Report from Pathways evaluators (Flora McMartin) <ul style="list-style-type: none"> • Synergies, Recommendations, Questions Discussion Q&A <ul style="list-style-type: none"> • Questions from Pathways evaluators
9:30-10:00	Summary of NSDL Usability studies & Discussion (Mick Khoo)
10:00-10:30	Break
10:30-12:00	Wrap-up Session (Kaye Howe)