

ELIN@PERI Review: Summary

This report is a summary of the review of ELIN@PERI undertaken in the last quarter of 2005 and the first quarter of 2006. The review briefly describes the background to ELIN and PERI and the advent of the ELIN@PERI pilot. It presents the key findings about how the pilot has been delivered at the implementing partner sites (Makerere University, Uganda, the National University of Rwanda and the Higher Education Commission, Pakistan) plus findings about usage and feedback from users. The review shows that ELIN is serving a need and that response to the programme has been largely positive. The review also highlights that the amount of effort and support required to maximise the success of the programme was originally underestimated. A list of recommendations for the future of the project are proposed.

Project outline

The aim of the ELIN@PERI pilot project was to investigate ways of improving access to online information using technologies to provide improved searching and discovery. The ELIN software (developed in Lund, Sweden) was selected as the tool for this project. The software integrates e-resources and provides a management tool for librarians, plus, for the users, an offline search mechanism with the objective of freeing up online time for downloading content already identified offline.

Three member institutions participating in the Programme for the Enhancement of Research Information (PERI) were identified to receive the ELIN@PERI service for an initial period of six to eight months as a pilot to test the efficacy of this programme. The pilot began with initial training in January 2005, and was completed in November 2005.

Partners

INASP worked in partnership with Lund University (LUB) to develop the software, prepare the training materials, and to develop and manage the project.

The three pilot partners were Makerere University, Uganda (MAK), The National University of Rwanda (NUR), and The Higher Education Commission, Pakistan (HEC). These provided a diversity of local context, illustrating different challenges in terms of electricity and connectivity, institutional support

and local capacity, languages and both remote and local server set-up.

The review

INASP commissioned this review with the aim of exploring lessons learnt in the pilot phase and to identify recommendations for the future of the service. The research was conducted using desk research and interviews of key stakeholders.

Individuals consulted included representatives of the project at Lund University and at INASP, as well as administrators of the pilot system within the implementing institutions (MAK, NUR and HEC). Users of the system were also consulted, including a brief survey of students and one-to-one interviews with faculty staff at Makerere University.

It should be noted that reviews such as this usually identify larger numbers of challenges than successes since the role of a review is to concentrate on what can be improved rather than what is working well. It is the opinion of the reviewer that the pilot ELIN@PERI should be judged as a success, and can be used as a template on which to develop a larger programme.

Findings

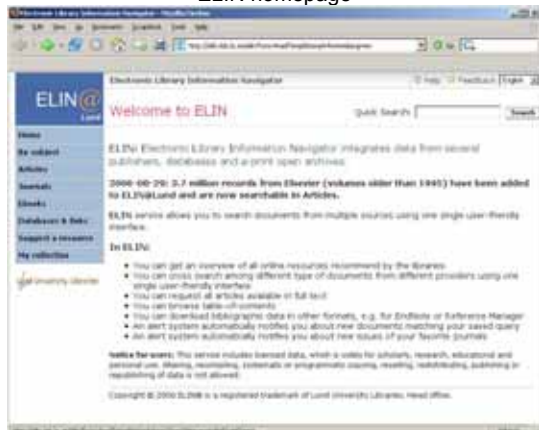
Successes

The ELIN@PERI pilot is judged to be a success by the partners involved, and users were generally complementary about the system. The technical

aspects appeared to be robust with few bugs. Technical administrators at the pilot partner sites expressed satisfaction with the running of the system – on both the local set-up basis (MAK and NUR) and on the basis of a remote set-up (HEC).

An unexpected benefit of the system was an improvement in the local document delivery services, with increased use and more streamlined and efficient service.

ELIN homepage



Users and administrators were happy with the interface of ELIN@PERI, finding it easy to use, with good navigation and presentation of features. Some refinements and improvements were recommended, but most of the feedback was highly positive.

It was felt that the technical management system and response were good, and there was a sense of confidence in future management and support - particularly since Lund is committed to the system for the long term.

All partners expressed a recognition of the importance for facilitation during the pilot and for the future, and felt that this was a strength of the programme. The division of responsibilities between INASP, Lund and the partner institutes was felt to have been clearly delineated, and contributed to the successful implementation.

The system administrators found the training to be useful, both in the delivery and the curriculum. This success is reflected in the fact that the administrators of the local systems appeared confident to deliver the system locally.

Challenges

The content available on ELIN@PERI did not include all the PERI resources, or all resources available at the partner institutions. This caused frustration in the users and was seen to be a large challenge to encouraging use of the system.

ELIN@PERI was designed to work through a queuing system whereby users select content which is then downloaded at a later time to maximise bandwidth. Although this design was specifically chosen to improve use of the available bandwidth, it caused frustrations in many users who wanted information immediately and found it unreasonable to be required to return at a later time to collect the material found during the initial search session.

The search facility on the system was felt to need some development: specifically to make it more prominent on the website, and to be supported by more training materials.

The system can be locally edited, but this has not yet been implemented. However the partner institutions all felt a need to locally adapt/design/edit the interface to make it more user-friendly and integrated within their own environments.

The project management was informal, reliant on good communication and collaboration by the partners. At times this led to under-resourcing and poor communication and information provision. In particular some of the institutional partners wanted more clarity about whom to contact regarding specific issues. There were also, at times, insufficient human resources devoted to this project by both LUB and INASP.

There was a need for much more sensitising and training of staff and students about the benefits of ELIN. The training strategy developed by MAK is impressive, and includes an online tutorial tool and an impressive schedule of trainings and awareness-raising events. Other partners could learn from it, but training elsewhere was frequently a challenge due to the different capacity levels of trainees (and trainers) in-country.

The three sites presented a range of technical, administrative and promotional capacity, which caused some frustration for the lead partners and led to increased workload in some cases (for example where there was a need to adapt training for different circumstances). There was also a need for more technical training than was provided.

Some concern was expressed over the materials provided for this project (training, promotional and background materials). In particular the documentation provided for *Core Requirements* and *Technical Specifications* needed some work to make them more useful. In addition, more support for promotion was requested - not only through provision of templates and other materials, but also through support for strategy and development of promotional activities.

The future: issues to consider

When considering the consolidation and/or expansion of the ELIN@PERI service, the main issues to consider include developing strategies for selecting partners, managing expansion, resourcing expansion and funding expansion.

There is increasing interest in ELIN from a variety of institutions around the world, and the lead partners in ELIN@PERI (LUB and INASP) need to decide whether they are able and willing to expand, or wish to consolidate the existing project. A plan needs to be developed to support any decision on future strategy.

An opportunity exists to decentralise some of the services to local hubs, and this should be taken into consideration along with the issues of geographical and language focus and the criteria for inclusion. It is likely that other institutions participating in PERI and suffering with low bandwidth will be interested to participate, but the criteria for participation needs to be carefully thought out as there are direct implications for resources required (depending on local conditions as well as the number of new organisations joining).

There is a need (as evidenced from the pilot project) to adapt according to local conditions, and these are likely to change over time as partnering institutions develop (or lose) skills and capacities. This has implications for the planning, delivery and support required from LUB and INASP - and other potential future partners.

There are options for the management of an expanded (or consolidated) service, where the time, money and resources required by the lead partners is determined by the role they decide to adopt. These range from full involvement and committed resources to minimal commitment and low resource requirement. This has direct impact on the staff, skills and funding required by both Lund and INASP (and other lead organisations that may be identified), and must be carefully considered before a strategic plan is decided upon.

To support any future decision regarding expansion or consolidation, a clear exit strategy needs to be in place for the pilot partners, and any future partners that are included within the project.

Recommendations

1. Continue the service

It is recommended that the ELIN@PERI project is continued; with consolidation at the three pilot sites as the priority in the next six months, and the extension of the service to other PERI members in the subsequent period.

Screenshot showing content included in an ELIN implementation

Provider	Articles searchable in E2E	Journal names searchable in E2E
MEDLINE	Yes	Yes
PubMed Central	No	Yes
ISI	Yes	Yes
ISI	Yes	Yes
ISI	Yes	Yes
ISI	Yes	Yes
ISI	Yes	Yes
ISI	Yes	Yes

2. Consolidate the ELIN@PERI service

It is recommended that the ELIN@PERI project is consolidated before expanding further. There is still a need for improvements and localising of the website interfaces, better search facilities and more content. There is also a need for a more systematic partnership arrangement whereby implementing partners and lead partners are all clear about an agreed level of coordination and communication.

3. Develop a strategy

It is recommended that LUB and INASP agree a joint strategy and plan for the continuation of the ELIN@PERI service. This agreement should cover the roles and responsibilities of each partner, the level of staffing and resources according to agreed activities, agreement on a system of rates and payments and a clear annual implementation plan covering consolidation and expansion.

4. Proceed with expansion

It is recommended that the ELIN@PERI service is expanded to more PERI members, and that this expansion should be strategised by the lead partners – integrating expansion with the overall expansion of ELIN in terms of languages and regions covered. The expansion of the service should be based on a mid- to long-term year strategy.

5. Explore the feasibility of partner 'hubs' for ELIN@PERI

It is recommended that partners explore the development of ELIN@PERI from the existing base of pilot partners before expanding to new partners. The development of an East African hub at Makerere should be investigated, with a feasibility study undertaken within the next six months. The development of ELIN@PERI in Pakistan should be reviewed in mid 2006 in order to learn more about the development of the service in the context of a network of universities.

6. Improve project management and resources

It is recommended that the project management and processes of ELIN@PERI be strengthened; particularly focusing on appropriate levels of staffing and time for support tasks such as technical management (LUB), facilitation (INASP) and communication by all parties.

7. *Develop and improve strategies and tools for promotion*

It is recommended that the ELIN@PERI service should further develop strategies and tools for promotions and user training – on both the central and local level. Promotions and user training at implementing sites is not sufficiently developed and should be supported by better materials and support for increasing usage.

8. *Improve M&E and availability of statistics*

It is recommended that monitoring and evaluation needs to be an integral part of the future ELIN@PERI project strategy, with clear roles and responsibilities agreed between all parties. It is also recommended that usage statistics should be immediately available to the partners, and that technical support should be provided to assist with local collection, interpretation and use of this data.

9. *Improve partner training*

It is recommended that the training for implementing partners should be developed further; with improved materials, improved planning by LUB trainers and increased training curricula to provide advanced skills in administrative and technical staff. It is also recommended that lead partners should oversee selection of trainees to ensure adequate levels of capacity and preparation prior to each training event.

10. *Develop more systematic new partner selection*

It is recommended that prospective future implementing partners are identified according to a clear set of criteria which is focused on practical 'capacity' considerations. The 'core requirements' document for new partners should be revised and the process made transparent within the PERI membership.

ELIN@PERI review

The review of this project was undertaken by Jackie Davies. This summary has been prepared by INASP.

For further details about the project, please visit the INASP website: www.inasp.info

About INASP

Enabling worldwide access to information and knowledge

The mission of INASP is to enable worldwide access to information and knowledge with particular emphasis on the needs of developing and transitional countries. Established in 1992, we work with partners around the world to encourage the creation and production of information, to promote sustainable and equitable access to information, to foster collaboration and networking and to strengthen local capacities to manage and use information and knowledge.

We act as an enabler, connecting worldwide information and expertise. Working through networks of partners, we aim to strengthen the ability of people in developing and transitional countries to access and contribute information, ideas and knowledge. In particular we seek to:

- improve access to scientific and scholarly information
- catalyse and support local publication and information exchange
- strengthen local capacities to manage and use information and knowledge
- foster in-country, regional and international cooperation and networking
- advise local organisations and agencies on ways to utilise information and publishing to achieve development goals.

International Network for the Availability of Scientific Publications (INASP)
58 St Aldates, Oxford OX1 1ST, United Kingdom

Tel: +44 1865 249909 Fax: +44 1865 251060

Email: inasp@inasp.info Web: <http://www.inasp.info>

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