EQUINOX Project: Summary of Results

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The Author

Zoë Clarke is a Research Fellow in CERLIM, and her main research activity is in the field of library performance measurement. She was Co-ordinator of the EC funded EQUINOX project which developed performance indicators for the electronic library. Her previous work in the performance measurement field was on the EQLIPSE and CAMILE projects, researching models and tools to support decision making in libraries.

The Occasion

This is a summary of the Project now completed.

Introduction

The EQUINOX Project was a European Commission funded project which ran from November 1998 - November 2000. The Project was led by the Centre for Research in Library and Information Management (CERLIM), based at Manchester Metropolitan University, with Professor Peter Brophy as Project Manager and Zoe Clarke as Project Co-ordinator.

Project Consortium:

Manchester Metropolitan University, UK (Co-ordinator)

National Microelectronics Applications Centre Ltd, IE (partner)

Fretwell Downing Informatics Ltd, UK (partner)

Dublin City University, IE (partner)

Universitäts- und Landesbibliothek Münster, DE (partner)

Universitat Oberta de Catalunya, ES (partner)

Stockhom University Library, SE (partner)

Setting the Scene

The EQUINOX Project addressed the need of all libraries to develop and utilise performance measures for the new networked, electronic environment, alongside traditional measures, and to operate these within a framework of quality management. Within the Project there was a strand of work towards the development of a standard set of performance measures for the electronic library environment, building on existing agreements for traditional library services and moving towards international endorsement. The second strand of the Project was the development of an integrated quality management and performance measurement software tool for library managers.

Approach

The first task was to design a set of electronic library performance measures and to disseminate the set widely in an attempt to achieve international agreement on them. This was followed by the formal definition of user requirements for both quality management and performance measurement modules for the

software system. A major element of system design and construction by the technical partners was paralleled by data input construction by the library partners, followed by validation of the system in the partner libraries, as the European and world-wide library community is brought into the validation process.

In the final stage the Project brought in a large number of libraries, which were offered the EQUINOX product for trialing in return for systematic reporting back to the Consortium. The Consortium used the feedback to complete the final functional specification and the exploitation plan showing how the EQUINOX product could be developed as a fully market-ready product.

Results and Achievements

The EQUINOX system consists of :

- Standard hybrid library performance indicators
- Standard hybrid library quality management framework
- Structured library management decision support system
- Standard open XML DTD interface to other library systems.

The EQUINOX system is PC-based software, available in stand-alone and networked client server versions, to provide an unique integrated structured approach to management decision support in hybrid library environments and enables librarians:

- to specify their own structure of aims, objectives and performance indicators within a quality management framework
- to import datasets from other automated systems, as well as inputting data manually
- to calculate indicators over time and display them graphically
- to set maximum and minimum values for each indicator and set appropriate alerts
- to manage their management data over time.

The system:

- Provides good integration with existing library systems
- Is easy to install and use - needs little technical experience
- Runs on standard Windows 95/98/NT/2K platforms, with no additional software/hardware requirements for most libraries.

The EQUINOX Software System is designed to help libraries to manage performance measurement and quality management procedures. The system allows the library to set up a quality framework for their own library, detailing mission statements, aims and objectives. This framework can then be linked to performance indicators, drawn from international standards or created in-house by the library. Raw data and measurements about the actual performance and operations within the library can be input and the EQUINOX system will calculate from this data how the library is performing in relation to its performance indicators and stated aims and objectives.

Electronic Performance Indicators

Following the evaluation of the indicators by the Project partners and peer review through dissemination activities the following finalised set was developed:

1. Percentage of the population reached by electronic library services
2. Number of sessions on each electronic library service per member of the target population
3. Number of remote sessions on electronic library services per member of the population to be served
4. Number of documents and entries (records) viewed per session for each electronic library service
5. Cost per session for each electronic library service
6. Cost per document or entry (record) viewed for each electronic library service

7. Percentage of information requests submitted electronically

8. Library computer workstation use rate

9. Number of library computer workstation hours available per member of the population to be served

10. Rejected sessions as a percentage of total attempted sessions

11. Percentage of total acquisitions expenditure spent on acquisition of electronic library services

12. Number of attendances at formal electronic library service training lessons per member of the population to be served

13. Library staff developing, managing and providing ELS and user training as a percentage of total library staff

14. User satisfaction with electronic library services

Conclusions and Future Plans

The potential market for the EQUINOX system comprises all libraries of all types world-wide - potentially many hundreds of thousands. However, only those libraries with IT systems in place are likely to be interested in adding an equally sophisticated management tool of this type. It is likely that the market will be expanded through the adoption of ICT-based systems by existing libraries, with concomitant management needs, rather than by expansion of the numbers of libraries. It is possible that libraries might prefer to purchase an EQUINOX-type system as an add-on to their main library management system.

A strategy for EQUINOX could therefore be to embrace a joint venture or other commercial arrangement with one or more library systems suppliers: however, this is not the consortium's preferred approach, since it could well tie the product in to a single vendor, losing a key advantage of its design (the ability to pull data from heterogeneous sources). Based on an analysis of possible exploitation strategies, it is concluded that the best option would be to set-up a joint venture company with an SME that has complementary products and/or services in the libraries market. At present no firm

commercialisation decision has been reached, any developments will be posted on the Project website [http://equinox.dcu.ie/].

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