Getting to grips with the figures: the Data Manager post at the University of Portsmouth

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Even before the current and growing pressures on university finance, as coordinator of electronic resources at the University of Portsmouth library I had been uneasy for some time about the limited extent to which we were studying usage data in order to inform our spending decisions. An increasing amount of data was becoming available and organisation and comparability were improving, due in large part to the COUNTER[1] initiative. I felt that we ought to gather data in a more systematic way and build its use into our purchasing and renewal decisions and procedures. I wondered whether there might be more cost-effective purchasing options available, for example via subject clusters, if only someone had the time to analyse the relative cost of the various options.

After a couple of years of lobbying on my part, my senior colleagues agreed to create a post specifically designed to tackle this. My case centred on the need to demonstrate value and on the dangers of making decisions without reference to an evidence base. The argument was for a post which would deal not only with data concerning use of electronic resources, but also with wider aspects of management data. The 'purpose of job' in the job description was:

> *To have responsibility for data collection, management and distribution relating to the library's activities, including assistance with user surveys*

and the management of usage data in relation to printed and electronic collections.

The detailed job description made clear that the role should cover use data for printed resources as well as electronic, plus stock-related information – acquisitions, withdrawals etc. – and user-related data such as footfall. It was also made clear that the reporting aspect of the job should include the production of regular reports of key data sets, plus customised data to meet specific needs identified by colleagues, especially senior managers and faculty librarians. Originally the post was to be combined with that of a serials assistant to make a full-time post of two equal parts. This option proved untenable, however, since none of the applicants proved able adequately to meet the specification for both halves of the job. Thus it was that we finally appointed to the half-time post of Data Management Assistant in early 2008.

Although it would be gratifying to think that our recruitment skills are good, there is always an element of fortune at play in such matters: the right candidate has to be out there and has to apply! We have been very fortunate in the appointment of the first holder of this post. Sarah Weston is a recent entrant to the profession following a career change, and as such she brings a keen interest in all aspects of higher education libraries and an eagerness to learn. She also has maturity, excellent organisational skills and, thanks to her background as a scientist, an analytical approach which has proved ideal for the post.

That is not to say that she found things easy. Although I had no doubt of the need to work towards a stronger evidence-base in our planning, I was by no means sure how successful this initiative would be. There was no precedent or blueprint to follow. What were the priorities for the role? What were the key tasks? How would the workload develop in relation to the academic year and would there be an even, regular pattern of work? Was there, in fact, enough work to sustain a half-time post?

For Sarah the post represented both a significant challenge and a rare opportunity. She was presented with the opportunity to fashion the role and set up routines and procedures to define the post for any successor. On the other hand the learning curve was incredibly steep and the scope for doubt and uncertainty considerable.

Without an established framework for Sarah to follow, my approach to her induction was largely based on introducing her to the varied sources of management data and to the people with whom she would need to work. In retrospect, I gave too little thought to how she might set about organising the data and what her priority tasks should be. My 'learning schedule' had to be torn up at the end of the first week, and we agreed that Sarah and I would work together on identifying ways to tackle the task. Instead of engaging directly with the data, we examined the nature of the task as we saw it, understanding the myriad sources of management information and devising ways in which those data could be better managed. In due course we were able to identify some objectives and key tasks and Sarah was ready to start laying the foundations for the working practices to deliver the end product.

Sarah herself takes up the account from here. My arrival at the University of Portsmouth followed a decision to alter my career pathway and pursue a postgraduate qualification in library and information studies. The newly created post with responsibility for the collection and management of data in relation to library activities sounded both interesting and challenging, offering a degree of autonomy and an opportunity to utilise a range of transferable skills whilst hopefully developing a range of new ones along the way. In the event it has drawn upon my distance learning course experiences most notably in areas of policy.

The job description highlighted an impressive, though somewhat daunting array of duties and responsibilities. However, the means by which to achieve them were less clearly defined, largely because of the newness of the post. The lack of preconceived ideas represented an opportunity to guide the direction of the role in line with the aims and objectives of the library: there were plentiful opportunities to determine needs, identify meaningful data to assist in decision-making, be involved in a wide range of projects and develop priorities for the future.

The role proved daunting in the early days not only in terms of the potential scale of the post, but also of the need to assimilate quickly a vast quantity of pertinent background information pertinent to the role and to higher education libraries. It involved extensive dialogue not only with colleagues, but also with external stakeholders involved with management data. The dynamic nature of the role ensures that it continues to be challenging today – part of its attraction I guess!

Early discussions with colleagues facilitated an assessment of the perceived value of data in terms of decision-making. A need to increase awareness of data and their availability and highlight their potential value was identified. A preliminary review revealed extensive data collection activities and it was necessary to prioritise: management of electronic resource usage data in particular was seen as an integral component of the role in the early days, given the university's extensive subscriptions to electronic books, serials and databases.

In conjunction with colleagues, and in the absence of an Electronic Resource Management ERM system, significant effort has been employed in developing an internal management system to document access arrangements and effectively store data, as well as promoting the existence of the system both within the library and across faculties. This process is ongoing, in keeping with the transient nature of resource subscriptions and the need continually to update our knowledgebase. We have experienced a steep learning curve as we have grappled with the complex issues surrounding electronic resource management. The use of 'we' is deliberate as the process has involved numerous hours spent with members of the technical services team.

Within a relatively short timeframe a number of significant outcomes have been achieved:

- documented knowledge of what data are available from each publisher, database or e-journal deal and an increased awareness of our resource provision
- the creation of a regularly updated databank of electronic resource usage data with agreed content
- schedules for production of usage data for each faculty librarian on a regular basis, to assist with decision-making in collection management, in conjunction with departments
- more detailed monitoring of uptake of new resources
- a wider schedule for regular data collection and dissemination not specific to particular faculty librarians
- establishment of an authoritative knowledgebase of database subscriptions, including costs, renewal details and usage access arrangements
- raising of awareness in faculties through presentations at university and faculty library committees

- rationalisation and synchronisation of the management data required for internal reporting purposes with that gathered for the annual SCONUL return, with a view to establishing a single 'global' repository of management data with the primary aim of improving consistency of reporting. It is hoped that this in itself will lead to a more streamlined approach to internal reporting
- development of more consistent policy for the collection, recording and storage of data for management purposes
- documentation of procedure, including definitions of key criteria, to improve consistency of data collection over time series.

Work is ongoing as we seek to extend the knowledgebase of resources to include all e-journal subscriptions. We have worked hard to develop our data infrastructure and are now able to utilise our knowledgebase more effectively in terms of management decision-making. Recent projects involve participation in a working group set up to review financial processes: comparative benchmarks have been established for e-journals, both within and outside the 'big deals', and this has involved significant input of usage data to populate the benchmarking models we are piloting. This process, although in its infancy, has already provided evidence upon which cost-effective decisions have been made regarding the renewal or cancellation of specific resources in consultation with departments. We anticipate that this work will expand considerably as we delve more deeply into the analysis of our 'big deals'.

The role was never identified as being solely concerned with usage data, and it can be seen that it involves management data in a much wider sense. It has developed in breadth as well as depth, involving attendance at meetings at a relatively senior level. For this reason the post has been re-graded and re-titled, the word 'assistant' being dropped to leave the more accurate term 'Data Manager'. As for concerns about whether there was enough work to sustain a half-time post, it is now clear that there is increasing pressure on the post to meet a growing range of demands.

As the role has developed and many questions have been answered, inevitably many more have been raised. It was necessary to take a proactive approach and to consider future as well as existing needs. Awareness has been raised of the potential value of data for any new initiative or project. Data collection is not regarded as a 'bolt on' activity, but is increasingly recognised as

integral to the systems that we seek to develop. With the rapid accumulation of stored data has come the continual challenge of determining what is both useful and necessary: the task of gathering and organising the data has to be weighed against the business gain derived from them, bearing in mind their limited ability to tell us the whole story. In turn this has led to frustrations as we have sought answers to questions for which there are still no available data. Developing the role has been interesting and has provided an invaluable opportunity to work with people from a wide range of professional backgrounds. It has involved liaison, consultation and teamwork and has given us a firm base from which to reflect on and ask questions about our service provision and, we hope, assist us with future decision-making.

NOTES

1   http://www.projectcounter.org