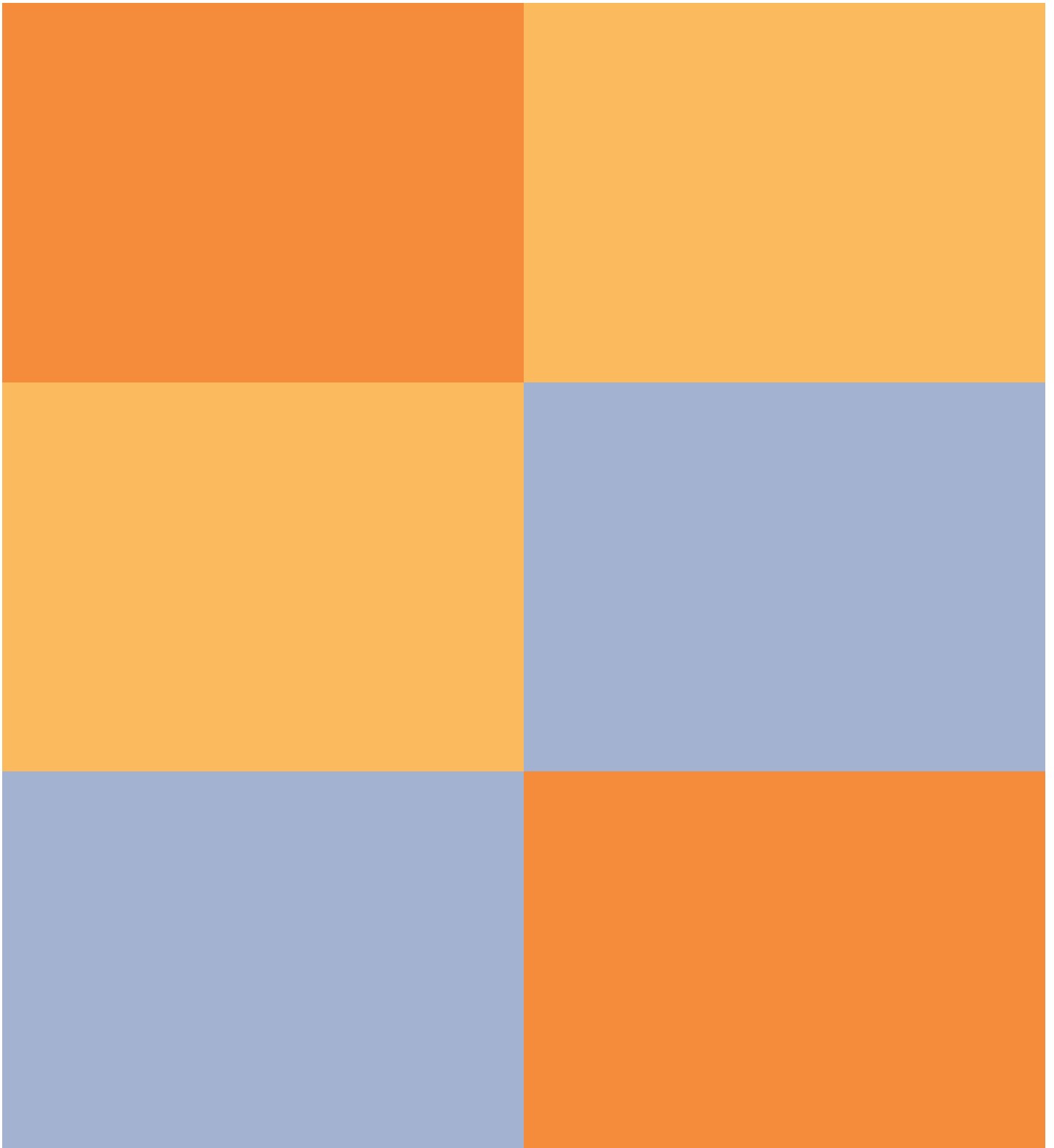


JISC

JISC Attitudinal Survey 2008

Head and Senior Learning and Librarian Staff



Contents

Key findings	4
Background to survey	8
Structure and future direction.....	11
Service structure	11
Future direction	12
Key challenges	13
Diversification	16
Content and licensing issues	21
Collaborative working	22
Managing and sharing electronic resources.....	25
Support and advice for searching for content.....	29
Measuring the impact of electronic resources	30
JISC consultation exercises	31
Digitisation issues	34
Strategy	34
Prioritising digitisation.....	36
JISC Collections.....	38
Overall satisfaction	38
Future priorities	40
Model licences.....	42
Communication issues.....	45
Subject awareness	47
Awareness of JISC activity.....	50
Libraries of the Future Campaign.....	54
Social networking	58
Marketing innovations	61
Awareness of initiatives.....	62
Cloud computing	64
Specialist Colleges.....	67
Appendix	69

Key findings

Structure and future direction

- Head and senior librarian and learning staff report that almost a half of institutions in HE and a third in FE have integrated or shared library/LRC services such as with IT or information services. The majority do not see any changes to the current situation/arrangement over the next 12 months. Overall, around a fifth of institutions are likely to change. Change is fairly evenly spread between both sectors, mostly moving in the direction of integration.
- e-Resources/electronic content was cited most frequently as a key challenge facing libraries and LRCs with issues including management, sharing, provision, access to and financial constraints. Other challenges included wider funding and financial issues (particularly within HE), and keeping up-to-date with new technologies and incorporating them into library/LRC services. Pressure on space was also mentioned commonly by HE respondents.
- Overall, respondents from 43% of UK HE and FE institutions agreed that libraries/LRCs should develop non-academic services to complement their traditional role – more so in FE than HE. However, a sizeable proportion said that it depends (particularly within HE) and that developing any such services must be in line with the overall strategy of the institution and needs of the user rather than for the sake of it, or in some cases purely for financial gain, which could be detrimental to all.
 - In FE suggestions centred on developing retail/selling activity or shop facilities, while in HE the focus was more on integrating with other student services and offering support or advice to students in areas such as careers development.
 - The main reason for opposition was that the function of the library could become diluted with such offerings distracting from the core purpose of learning. This could create issues around staff resource and training/skills to manage new services beyond the traditional offering.

Content and licensing issues

- Around half of HEIs (52%) report having collaborated with other academic institutions compared with a quarter of FE institutions. A similar trend occurs with collaboration with other parties (e.g. NHS, British Library, software supplier) with 31% of HE respondents saying they have collaborated compared with only 14% of FE respondents.
- Frequency of collaboration is also higher within HE with those who have collaborated, 64% have done so on two or more instances with other academic institutions in the last 12 months compared with 36% in FE.
- Except for digitisation, HE and FE have tended to collaborate more with other institutions than with other parties on various activities.
- HE is 12 times more likely to collaborate on digitising collections than FE
HE is 5 times more likely to jointly procure hardware or digital collections than FE
HE is 3 times more likely to collaborate in developing a shared service than FE
- The Dewey Decimal Classification is the dominant classification system; however there are significant differences between HE and FE in their use of classification systems.

- Heads and senior library / LRC staff from 77% of UK Higher and Further Education institutions indicated that material, produced by members of their institution, is systematically managed and shared electronically somewhere within their institution.
- There have been no significant changes in the types of material that are managed and shared since 2007. Encouragingly though, there were significantly fewer respondents this year who were unsure of what their institution was doing in relation to electronically shared or managed materials in both HE and FE.
- Almost 9 out of 10 heads and senior library / LRC staff from UK Higher and Further Education institutions indicate that their institution provides support and help, to both staff and students, in effectively searching the web and the institution's library or resource centre for content.
- Four out of five of heads and senior library / LRC staff in both HE and FE institutions indicated that their institution measured the impact of online content or materials on teaching, learning and research
- Heads and senior library / LRC staff surveyed from HEIs are significantly more likely to have responded to a JISC consultation on licensing or procurement of content for the academic sector compared with their counterparts in FE (64% vs 38%, respectively)..
- Responding to such a consultation exercise, institutions have generally consulted or attained data from teaching staff (80%) more than students and learners (36%). Very few don't consult with or get data from any of these stakeholders when responding.

Digitisation issues

- Heads/senior librarian and learning staff from over half of both FE and HE institutions revealed that their institution has no digitisation strategy in place. More HE institutions either have or are planning to put one in place compared with FE where almost a quarter are unsure if their institution has one already.
- Institutions with shared or integrated library/LRC services are significantly more likely to be planning a digitisation strategy than those where services operate discretely.
- HEIs are at least twice as likely as FE institutions to have a central catalogue or list of collections digitised so far. This difference is influenced by the large proportion (57%) of FE institutions who claim not to have digitised any collections to date.
- HEIs are clearly more ahead in identifying 'top priority collections' for digitisation than FE institutions, with almost two thirds either currently or intending to do so compared with less than a fifth in FE.
- Although only 16% of HEIs have a formal digitisation strategy in place, a much higher proportion (44%) is prioritising collections for future digitisation.
- A higher proportion of Scottish HE/FE institutions as a whole have or are planning to put a digitisation strategy in place, have a central list or catalogue of digitised collections, and generally feel more informed about these issues.

JISC Collections

- Satisfaction with JISC Collections across institutions as a whole remains high and largely unchanged since 2007. Satisfaction in HE has increased significantly since 2007 and is now higher than FE.
- Head and senior librarians/LRC staff from 45% of UK HE/FE institutions said they would be willing in principle to sign a letter of intent and commit in advance to deals involving consortia purchasing, while 50% were unsure and require more information

to make this decision. Respondents from HE institutions were significantly more likely than their counterparts in FE to be willing to participate in this work.

- Both HE and FE felt that the top two priorities for acquiring new content were journals and e-books. Interestingly, FE ranked multi-media collections in third position.
- Awareness of the JISC Model Licence has increased significantly within HEIs since 2007, while awareness of NESLi2 has increased significantly within both sectors.
- Satisfaction with the JISC Model Licence is significantly higher within HE than FE, with the proportion 'very' satisfied in HE increasing from 18% to 25% in 2008.
- Satisfaction with the NESLi2 Model Licence across all institutions as a whole has remained unchanged since 2007. However, it has increased by 6 percentage points in HE and fallen by the same amount in FE.

Communication issues

- Head/senior learning and librarian staff from UK institutions feel best informed about e-Learning/VLEs and subjects relating to the library and content management and storage, and least informed about network capabilities, e-Research/e-Science and Green computing/ICT.
- Generally the level of knowledge in these subjects among this audience has remained fairly similar to last year, with the following significant exceptions; increases in the proportion who feel informed about:
 - access management issues (from 62% in 2007 to 76% in 2008),
 - social software/Web 2.0 (from 37% to 57%)
 - open access (from 46% to 58%).
- And a significant decrease in proportion informed about
 - digitised data collections (from 47% to 37%)
- The highest awareness of JISC funded activity is in the areas of access management and e-Learning/VLEs. Since 2007, there have been significant increases in the proportions of institutions aware of JISC funding activity in access management, open access and social software/Web 2.0. HE is more likely to be aware of JISC funded activity than FE.
- Early evidence shows that after six months of activity, a sizeable number of institutions are aware of JISC's Libraries of the Future Campaign and feel it is helping inform them of the role of libraries and JISC's involvement. The Guardian supplement 'Libraries Unleashed' has been the most effective communications channel for raising awareness of the campaign.
- Overall around a third agreed it a good idea for academic libraries/LRCs to make use of social networking opportunities to engage students with their services (more so in FE than HE, but not significantly) but around a half were unsure (rising to almost 60% in HE).
 - The main reasons for being pro this idea in both HE and FE were that it allows libraries/LRCs to engage with students using a medium that is already widely used, up-to-date and popular among students. Importantly, social networking is something which students respond to.
 - For those against the idea the main reason was that it would be an intrusion on students' social space and therefore should be kept separate. A number in FE also responded that using such technologies may distract students' concentration and time towards socialising when they should be studying.
 - For those saying it depends, a similar mixture of reasons were given; whether students want it in the first place, whether it's perceived as invading their space (especially in HE) or attempting to be too 'trendy', whether it will

distract from their studies (especially in FE), and difficulties in monitoring or supervision.

- Overall head and senior librarian and learning staff from around a third (37%) of institutions (43% in HE and 34% in FE) were aware of recent marketing innovations that help promote library or LRC services to students, academics or other users. Examples ranged from the more innovative (e.g. podcasts, blogs, social networking, Second Life) to the more traditional (e.g. newsletters, flyers, posters, promotional days).
- There have been significant increases in awareness and knowledge about the UK Access Management Federation across both HE and FE since 2007.
- Increases in awareness of Knowledge Exchange, SCA and e-Framework have been more modest, with changes occurring more at the 'know a little' or 'just heard of' level rather than increases in deeper understanding.
- Head and senior librarian and learning staff from 38% of UK institutions have heard of Knowledge Exchange Licensing. Of those that have heard of it, the majority know almost nothing about it.
- In contrast, awareness and knowledge of NESLi2 SMP is higher, particularly within HE where 42% claim to know a fair amount or more about it. In FE, although around half have heard of NESLi2 SMP, very few claim to know much detail about it.
- The use of cloud computing is currently low across the sector; slightly higher with HE than FE. Likelihood of use is also likely to be fairly low with only around one in ten institutions 'definitely' considering it.

Background to survey

Introduction

This is the second year of the redesigned JISC Attitudinal Survey of Head and Senior Librarians Learning Resource Centre Managers conducted by the Monitoring Unit at the University of Kent on behalf of JISC. The survey replaced the previous annual Content Services survey to focus on a wider range of issues pertinent to JISC and the community beyond simply JISC content services.

This year's survey was supported by SCOUNL who included a number of questions and assisted in the promotion of the survey to encourage response.

This report covers the following five areas:

- Structure and future direction
- Content and licensing issues
- Digitisation issues
- Attitudes towards JISC Collections
- Communication Issues

The questionnaire contained a total of around 40 questions depending on answers given to previous questions. A small number were repeated from 2007 to allow comparison year on year.

The report focuses on the response from the higher and further education community, although a separate section reports on the findings of the six specialist colleges who participated.

It is important to note, that the findings of this survey reflect the views of Head and Senior Learning and Librarian staff who responded to the survey, and is therefore a reflection of their attitudes and perceptions rather than that of the whole community which JISC serves.

Throughout the report, comparisons between countries are made; however, these findings should be taken as indicative rather than necessarily representative due to small sample sizes.

Methodology

The Monitoring Unit was responsible for conducting the fieldwork. A database of survey contacts was established prior to the start of the survey, allowing invitations to participate to be sent to named individuals rather than job titles. All institutions with a primary JANET connection were surveyed. The database contained at least one key contact from all 659 FE/HE/SC organisations with a primary JANET connection.

The primary 'content survey contact' was typically the Head Librarian (HE) or Manager of the Learning Resource Centre (FE). These individuals were invited to take part in the survey and to encourage other suitable (senior) members of their staff to participate as well. As such, multiple responses were accepted from single institutions.

Letters of invitation were sent out on 27th May 2008 to survey contacts at 447 FE institutions, 170 HE institutions, and 42 Specialist Colleges, making a total of 659 invited institutions.

The JISC Regional Support Centres were informed of the survey prior to its start and asked to assist in promoting it to institutions in their area. Announcements advertising the survey were made on the Monitoring Unit web site and via SCONUL and CILIP email lists.

Regular reminder emails were sent to all those who had not responded. The survey ran for 6 weeks, before finally closing on 4th July 2008.

As with previous years, a web based survey system (SurveyConsole) was used as the primary and preferred response method. An Adobe PDF version of the questionnaire was available on the Monitoring Unit's web site for reference and as an alternative response method.

Survey response

A total of 296 head/senior learning and librarian staff responded to the survey from 284 separate UK HE and FE institutions representing an overall institutional response rate of 46%, the same as 2007.

The 296 individuals were made up of 91 from HE and 205 from FE. Of the 284 institutions, 83 were HE and 201 FE, equating to sector response rates of 49% and 45%, respectively. This shows a decrease in HE response from last year from 59% but an increase in FE from 42%. The response may have been affected by the need to push the fieldwork back by almost two weeks to avoid clashing with two other JISC surveys targeting similar audiences. Efforts were made to distinguish the survey to increase recognition that it was the annual survey but the occurrence of multiple surveys is likely to have had a negative impact on response rates.

240 respondents classified themselves as 'Head of library, Learning Resource Centre, e-Learning or similar', and 56 as 'Other senior Library or LRC staff'.

A total of 6 Specialist Colleges participated in the survey out of the 42 who were invited to take part (up from 4 in 2007). Data from this audience is reported on separately although the low response rate (14%) means caution must be taken with the findings as we cannot be confident that it is a representative reflection of attitudes across Specialist Colleges as a whole.

Data analysis and weighting

To ensure that the survey response was representative of the profile of HE/FE institutions within the UK as a whole, the response profile was checked against the known profile of HE and FE institutions with a primary JANET connection according to the following parameters; ratio of HE:FE institutions, geography and JISC Banding. Because we do not have any data

on the actual profile of head or senior learning or librarian staff within HE and FE institutions, it is not possible to compare the sample profile to that of the academic population profile. However, we do have details about the profile of HE/FE institutions with primary JANET connections. The response profile was found to closely match the overall profile of institutions in each of these three parameters. In addition, the ratio of HE:FE institutions within each country in the response closely matched the actual profile splits in each of the countries. As such, no weighting was applied to the data in this respect.

However, because multiple responses were allowed from institutions, it was necessary to weight the data so that no single institution was over-represented in the response as a result of more than one individual from that institution responding. This only occurred in a small number of cases and hence the impact of the weighting was minimal. The findings therefore reflect the numbers or proportions of institutions rather than individuals.

Full details of the response and weighting are shown in the appendix.

All base sizes are presented in the report in terms of the unweighted number of respondents (296) and institutions (284), unless otherwise stated. Throughout the report, the term 'significant' refers to differences that are statistically significant at the 95% level or greater ($p = \text{less than or equal to } 0.05$).

Structure and future direction

In summary:

- Head and senior librarian and learning staff report that almost a half of institutions in HE and a third in FE have integrated or shared library/LRC services such as with IT or information services. The majority do not see any changes to the current situation/arrangement over the next 12 months. Overall, around a fifth of institutions are likely to change. Change is fairly evenly spread between both sectors, mostly moving in the direction of integration.
- e-Resources/electronic content was cited most frequently as a key challenge facing libraries and LRCs with issues including management, sharing, provision, access to and financial constraints. Others challenges included wider funding and financial issues (particularly within HE), and keeping up-to-date with new technologies and incorporating them into library/LRC services. Pressure on space was also mentioned commonly by HE respondents.
- Overall, respondents from 43% of UK HE and FE institutions agreed that libraries/LRCs should develop non-academic services to complement their traditional role – more so in FE than HE. However, a sizeable proportion said that it depends (particularly within HE) and that developing any such services must be in line with the overall strategy of the institution and needs of the user rather than for the sake of it, or in some cases purely for financial gain, which could be detrimental to all.
 - In FE suggestions centred on developing retail/selling activity or shop facilities, while in HE the focus was more on integrating with other student services and offering support or advice to students in areas such as careers development.
 - The main reason for opposition was that the function of the library could become diluted with such offerings distracting from the core purpose of learning. This could create issues around staff resource and training/skills to manage new services beyond the traditional offering.

Service structure

Head and senior librarian and learning staff from 57% of UK HE/FE institutions state that library/LRC services function as a discrete service within the institution, compared with 37% of institutions where library/LRC services are part of an integrated or shared service such as with IT or information services. Only 5% of institutions overall have some form of other arrangement e.g. entirely outsourced services.

Statistically significant differences do occur between HE and FE. HEIs are significantly more likely to have integrated or shared library/LRC services than FE institutions (46% vs 34%, respectively), and in contrast three-fifths of FE institutions have discrete services compared with around a half of HEIs.

Table 1: Which of the following best describes how library/LRC services are currently set up within your institution/organisation?

Arrangement	All HE/FE	HE	FE
Functions as a discrete service	57%	49%	61%
Part of integrated/shared service (e.g. with IT services or information services)	37%	46%	34%
Other	5%	5%	6%

Base: All HE/FE (296 respondents, 284 institutions)

Although based on small sample sizes, the proportion of HE/FE institutions with integrated or shared library/LRC services is higher in Scotland (47%), Wales (54%) and Northern Ireland (50%) than in England (35%). This difference is largely accounted for by FE in England where around two-thirds of institutions have discrete services, while in HE the proportions are broadly similar.

The figures in Table 1 closely match those given by heads, directors and managers of IT/Network services in the JISC Network Infrastructure Survey in January 2008, where 32% stated their IT services were integrated or shared with other services such as library or information services. 65% stated they operated discretely.

Future direction

Heads and senior librarian and learning staff from the majority of institutions do not see any changes to the current situation/arrangement over the next 12 months. Overall, around a fifth of UK HE and FE libraries/LRCs are likely to change fundamentally in how they are structured with other internal services over the next 12 months. Change is fairly evenly spread between both sectors, mostly moving in the direction of integration.

For those currently operating with discrete library/LRC services the main area of change will be towards more integrated services, and those currently with integrated or shared services becoming either more integrated or devolved.

Table 2: Do you see this situation/arrangement changing in the next 12 months?

Direction	Discrete service	Integrated/ shared service	All HE/FE institutions
No change	73%	83%	76%
Yes, integration	18%	7%	13%
Yes more devolved	-	4%	1%
Yes, other	5%	1%	4%
It depends	3%	4%	4%
Don't know	1%	1%	1%

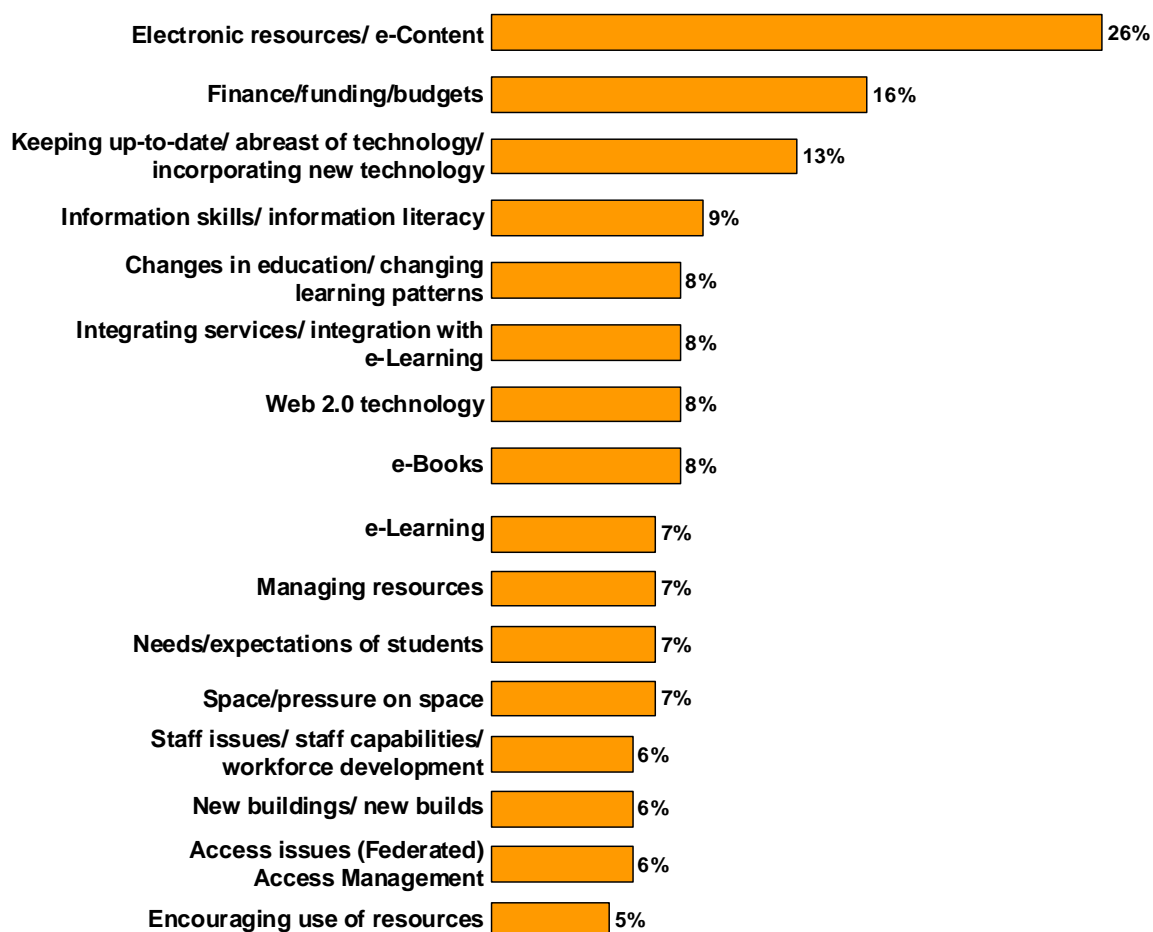
Base: All HE/FE (296 respondents, 284 institutions).

In contrast, fewer heads, directors and managers of IT/network services from institutions where IT services currently operate discretely, feel that their IT services structure will change (14% compared with 27% of librarians and LRC managers). The likelihood for change is very similar within institutions across England, Wales and Scotland (with around 23% of institutions likely to change).

Key challenges

Respondents were asked what they thought will be the two most significant challenges for academic libraries or learning resource centres over the next few years. Answers were given in open text rather than respondents being provided with a list of potential challenges. A range of challenges were given and the following chart shows those cited by 5% or more respondents from across HE and FE as a whole.

Q *What do you think will be the two most significant challenges for academic libraries/LRCs over the next few years?*



Base: all HE/FE (296 respondents, 284 institutions)

Table 3 shows the top mentions given by HE and FE respondents separately. For both sectors the top three most commonly cited challenges are the same. Other differences occur further down the rankings with financial challenges, pressure on space and open access noted by a significantly higher proportion of HE respondents, while in FE there were significantly more mentions of e-Books and new builds being challenges. These are discussed in more detail below.

Table 3: What do you think will be the two most significant challenges for academic libraries/learning resource centres over the next few years? Top mentions

HE		FE	
Rank	Challenge	Rank	Challenge
1	Electronic resources / E-content (27%)	1	Electronic resources / E-content (25%)
2	Finance/funding/budgets (26%)	2	Finance/funding/budgets (12%)
3=	Keeping up-to-date/ abreast of technology/ incorporating new technologies (17%)	3	Keeping up-to-date/ abreast of technology/ incorporating new technologies (11%)
3=	Space/ pressure on space (17%)	4=	Information skills/ literacy (10%)
5	Managing resources (10%)	4=	e-Books (10%)
6	Staff issues/ staff capabilities/ workforce development (9%)	6	Changes in education/ changing learner patterns (9%)
7=	Information skills/ literacy (8%)	7=	Integrating services/ integration with e-Learning (8%)
7=	Web 2.0 technologies (8%)	7=	e-Learning (8%)
9=	Changes in education/ changing learner patterns (7%)	7=	New buildings/ new builds (8%)
9=	Integrating services/ integration with e-Learning (7%)	10=	Web 2.0 technologies (7%)
11	Open access (6%)	10=	Needs/ expectations of students (7%)

Base: All HE (91 respondents, 83 institutions), all FE (205 respondents, 201 institutions)

The whole issue of e-Resources/electronic content was cited most frequently as a key challenge facing libraries and LRCs with issues including management, sharing, provision, access to and financial constraints. In both sectors, the perceived shift away from print materials and subsequent dependence on electronic resources raised a whole host of challenges including how to manage the sheer volume of materials available, how users will access them and how libraries and LRCs can provide or promote such resources to users. Associated with this, ‘e-Books’ and ‘managing resources generally’ also appeared in the top 10. Significantly more FE respondents specifically mentioned e-Books than HE however (10% vs 1%, respectively)

“The relentless move to e-resources and making them easily accessible to users.”

HE respondent

“Responding to the explosion of electronic information.”

HE respondent

“Promotion of good quality e-resources versus poor quality internet content.”

FE respondent

Funding and financial issues such as cost of electronic materials, subscriptions and changes or restrictions to budgets, featured strongly particularly within HE where significantly more mentioned this than in FE (26% vs 12%, respectively).

“Balancing limited budgets against growing demands for a huge variety of content.”

HE respondent

“Budget constraints related to rising cost of resources.”

FE respondent

“Getting the price of online resources to be affordable to match the actual demand for use - they are over priced for FE.”

FE respondent

“Expectation of providing wider range of services with constrained budgets.”

HE respondent

“Meeting increasing & diversifying user expectations in a context of financial constraint.”

HE respondent

The ability for librarian and LRC staff to keep up-to-date with new technology and incorporating them into library/LRC services was also mentioned frequently and in particular the emergence of Web 2.0 software and tools.

“Embracing new technology to deliver flexible services.”

FE respondent

“Responding to technological changes e.g. Web 2.0, the systems landscape etc.”

HE respondent

Information literacy and skills were also highlighted as key challenges by both HE and FE respondents. Much of this focussed on students' reliance on search engines such as Google and the need to encourage them to use other methods - providing services that will compete with Google for the students' first choice of information source. Consequently, there was a perception among many respondents that students' research skills are declining.

“Debate whether students should be taught information literacy as a separate accredited skill or whether it would be better to teach them to research main subject-based resources.”

FE respondent

“Producing graduates who are information literate.”

HE respondent

“Information Literacy - I think that this really going to be very important. Academic staff are realising that students lack research skills although they can all use Wikipedia & Google! Trying to get this built in across college will be interesting.”

FE respondent

“Guiding students towards appropriate internet services and search engines.”

FE respondent

However, the need for skills training was not only confined to students, but also extended to staff as well:

“Managing a fast changing environment and ensuring staff have the skills to respond.”

HE respondent

Space and pressure on space was a particular issue amongst HE respondents with 17% mentioning it as a key challenge compared with only 2% of FE respondents. In contrast, 8% of FE respondents mentioned new builds or buildings as a key challenge – unmentioned by HE.

“Need to offer flexible learning spaces in a context of pressure on space and financial resources.”

HE respondent

“Providing an integrated physical environment for multi-functional learning and research needs.”

HE respondent

“New builds for many colleges - getting the design right - future proofing.”

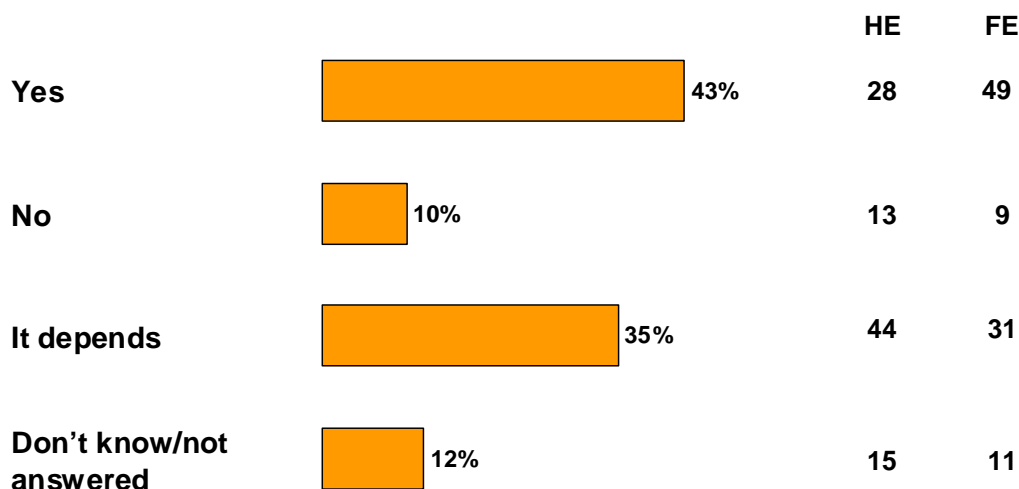
FE respondent

Although based on small sample sizes for Scotland, Wales and particularly Northern Ireland, there were indications of differences in perceived challenges facing HE/FE libraries and LRCs between countries. Challenges in the areas of electronic resources and e-Content were mentioned more by respondents within England and Scotland than counterparts in Wales or Northern Ireland. In contrast, keeping up-to-date or abreast of new technologies appeared more of a challenge for institutions within Wales and Northern Ireland (in terms of proportion of respondents from the particular country mentioning it as a challenge). However, in comparison to other countries, a sizeable proportion of respondents from Scotland mentioned Web 2.0 technology as a challenge. Sample sizes were too small to compare challenges by country within each sector.

Diversification

Overall, respondents from 43% of UK HE and FE institutions agreed that libraries/LRCs should develop non-academic services to complement their traditional role - rising significantly to 49% in FE. However, over half disagreed, were unsure or said that it depends (particularly within HE). A degree of confusion arose with this question in terms of respondents' understanding of what was meant by 'non-academic services' as no definition or examples were given. This was intentional however, to try and elicit spontaneous suggestions for non-academic services.

Q Do you think libraries/LRCs should develop non-academic services to compliment their traditional role?



Base: all HE/FE (296 respondents, 284 institutions)

Respondents from libraries/LRCs whose services are currently integrated or shared with other services within the institution are significantly more likely to agree they should develop non-academic services than those from institutions with library/LRC services that operate discretely (52% vs 36%, respectively). This difference was evident within both sectors.

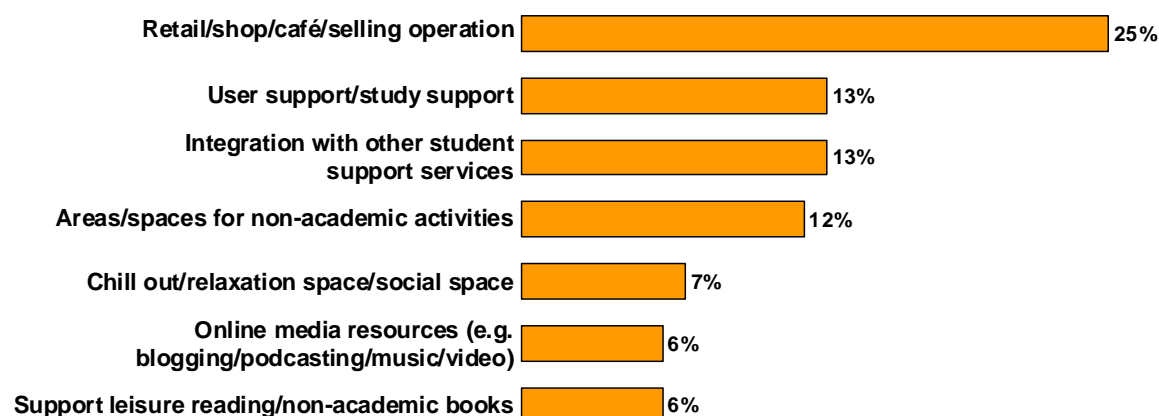
Table 4: Do you think libraries/LRCs should develop non-academic services to complement their traditional role by how the service is currently structured?*

	All HE/FE		HE		FE	
	Discrete	Shared	Discrete	Shared	Discrete	Shared
Yes	36%	52%	16%	39%	43%	59%
No	10%	10%	13%	12%	8%	10%
It depends	39%	31%	51%	38%	34%	27%
Don't know/not answered	16%	7%	20%	11%	15%	4%

Base: All HE/FE (91 HE and 205 FE respondents, 83 HE and 201 FE institutions). *See earlier section on service structure, either functions as a discrete service or part of integrated/shared service (e.g. with IT services or information services).

Respondents were asked to give examples of the types of non-academic services they think should be developed. A range of suggestions were given. The following chart shows examples cited by 5% or more HE and FE respondents combined. There were discernable differences in suggestions between HE and FE which are outlined below.

Q Please give some examples of the types of non-academic services that you think should be developed?



Base: all who think libraries/LRCs should develop non-academic services (127 respondents, 122 institutions)

In FE, the most common examples by far centered on retail/selling activity or shop facilities, for example stationary sales, refreshments and book shops (24%), followed by areas or spaces for non-academic activities such as socialising, relaxation, studio work or music rehearsal (19%).

“Become a ‘One Stop Shop’, offering learning support, social learning spaces, ‘chillout’ areas, book / stationery shop, etc.”

FE respondent

“Incorporation of social spaces like internet cafes and franchises in LRC space. Be aware of and receptive to any income-producing activity.”

FE respondent

“We have an integrated ‘learning cafe’ with wireless access and a welcoming ‘academic’ feel, but it also functions on a commercial footing. I think libraries should consider providing any service which helps staff or students. If it runs at a profit, even better.”

FE respondent

“More space and resources for ‘social learning’ - food & drink, social areas, game stations, Skype.”

FE respondent.

In contrast, the focus in HE related more to offering support or advice to students in areas such as studying and careers development (7 mentions) and integrating with other student support services (4 mentions). It should be noted that these figures are based on only 26 respondents from 24 HEIs.

“Closer integration with other cognate student services - careers, student services, IT to provide seamless service delivery, preferably from the one building.”

HE respondent

Similar examples for support and integration with other services were also given by around one in ten FE respondents.

“We currently offer a range of other services - counselling services, careers advice, information centre, more IT services, etc.”

FE respondent

Other examples given by a handful of respondents included broadening the offering of libraries to more leisure orientated material (such as film, fiction etc), DVD lending, allowing the public to use facilities and reading/book clubs.

Respondents from only 1 in 10 HE/FE institutions (13% in HE, 9% in FE) disagreed that libraries/LRCs should develop non-academic services to complement their traditional roles. The main criticism was that the function of the library could become diluted. There were fears that such offerings could be a distraction from learning - the core purpose of libraries and LRCs. There would also be implications on available staff resource and potential demand for more training or skills to manage new services beyond the traditional offering.

“Our core function should be to provide academic support and we should fight to maintain that function.”

HE respondent

“The focus is on the learner and the learners' experience we don't want to dilute that ethos.”

FE respondent

“There are already more requirements for services to support academic activities than can be met by resources, and diversions in other areas, even if fully funded, will divert attention from the core mission.”

HE respondent

A third of respondents (44% in HE, 31% in FE) said 'it depends' in response to the original question. As mentioned earlier, there was a degree of misunderstanding with the question leading to 37 out of the 98 respondents saying it depends how you define 'non-academic services'. It was clear that developing any such services must be in line with the overall strategy of the institution and needs of the user. If widening these services was done for the sake of it, or in some cases purely for financial gain, then this could be to the detriment of both the library itself and the end user.

“Libraries certainly need to develop their services to remain relevant in a rapidly changing information market, but any service development must be appropriate and aligned to broader strategic aims of the institution.”

HE respondent

“It depends on what is considered a non-academic service. If it still complements the organisation's aims then they should look to develop them. If it is just developing non-academic services for the sake of it, to

get more people into the library then you run the risk of losing focus and sight of what a library's role should be."

FE respondent

"It depends on whether decisions to do this are financial (i.e. to save money) or whether they genuinely complement the role of the LRC and support."

FE respondent

"If you mean developing social learning spaces and accompanying services, then the answer is yes, but I would say that everything is driven by academic demands."

HE respondent

"There is scope to provide students with access to a wider range of services within libraries but they might not all be provided by the same organisational unit: study skills support; IT support; career and personal counselling etc."

HE respondent

Content and licensing issues

Content and licensing is covered in this chapter under five areas

- Collaborative working
- Managing and sharing electronic resources
- Support and advice for searching for content
- Measuring the impact of electronic resources
- JISC consultation exercises

The questions relating to the management and sharing of electronic resources were repeated from 2007 to identify year-on-year change.

In summary:

- Around half of HEIs (52%) report having collaborated with other academic institutions compared with a quarter of FE institutions. A similar trend occurs with collaboration with other parties (e.g. NHS, British Library, software supplier) with 31% of HE respondents saying they have collaborated compared with only 14% of FE respondents.
- Frequency of collaboration is also higher within HE with those who have collaborated, 64% have done so on two or more instances with other academic institutions in the last 12 months compared with 36% in FE.
- Except for digitisation, HE and FE have tended to collaborate more with other institutions than with other parties on various activities.
- HE is 12 times more likely to collaborate on digitising collections than FE
HE is 5 times more likely to jointly procure hardware or digital collections than FE
HE is 3 times more likely to collaborate in developing a shared service than FE
- The Dewey Decimal Classification is the dominant classification system; however there are significant differences between HE and FE in their use of classification systems.
- Heads and senior library / LRC staff from 77% of UK Higher and Further Education institutions indicated that material, produced by members of their institution, is systematically managed and shared electronically somewhere within their institution.
- There have been no significant changes in the types of material that are managed and shared since 2007. Encouragingly though, there were significantly fewer respondents this year who were unsure of what their institution was doing in relation to electronically shared or managed materials in both HE and FE.
- Almost 9 out of 10 heads and senior library / LRC staff from UK Higher and Further Education institutions indicate that their institution provides support and help, to both staff and students, in effectively searching the web and the institution's library or resource centre for content.
- Four out of five of heads and senior library / LRC staff in both HE and FE institutions indicated that their institution measured the impact of online content or materials on teaching, learning and research
- Heads and senior library / LRC staff surveyed from HEIs are significantly more likely to have responded to a JISC consultation on licensing or procurement of content for the academic sector compared with their counterparts in FE (64% vs 38%, respectively)..
- Responding to such a consultation exercise, institutions have generally consulted or attained data from teaching staff (80%) more than students and learners (36%). Very few don't consult with or get data from any of these stakeholders when responding.

Collaborative working

Respondents were asked to indicate how they had worked collaboratively with other institutions and organisations during the last 12 months. Head and senior librarian and learning staff from around a half of HEIs (52%) reported having collaborated in at least one of these areas with other academic institutions compared with a quarter of FE institutions. A similar trend occurs with collaboration with other parties (e.g. NHS, British Library, software supplier) with respondents from 31% HEIs saying they have collaborated compared with only 14% in FE.

The frequency of collaboration is also higher within HE. Of those who have collaborated, 64% have done so on two or more instances with other academic institutions in the last 12 months in HE compared with 36% in FE. 30% of HEIs have done so on 3 or more occasions compared with 16% of FE institutions. In both sectors therefore, the majority who have collaborated have done so once in the last 12 months.

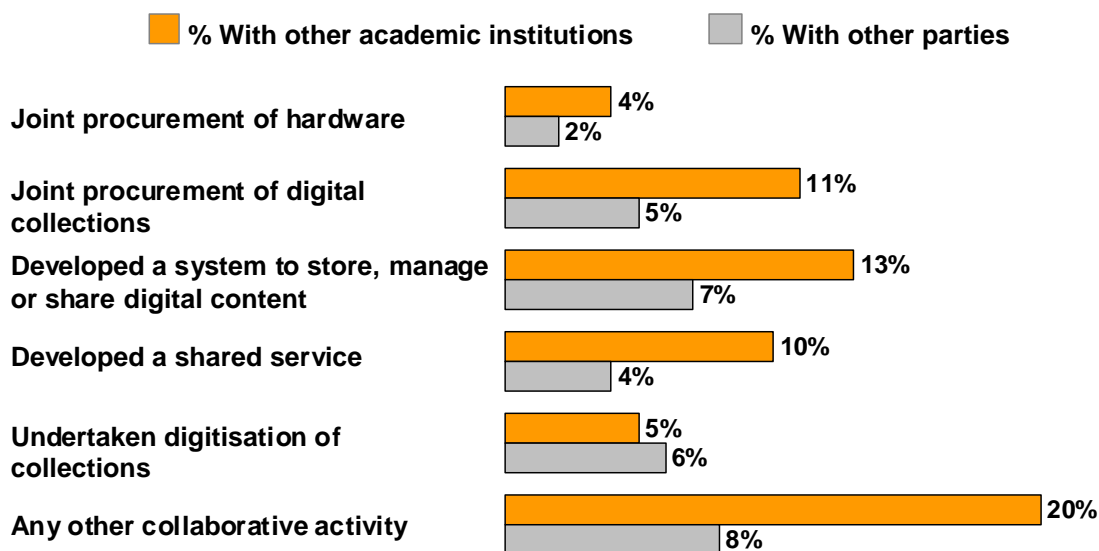
Table 5: Frequency of collaborating in last 12 months

	All HE/FE	HE	FE
With other academic institutions			
Two activities	27%	34%	20%
Three or more activities	22%	30%	16%
With other parties/suppliers			
Two activities	39%	31%	46%
Three or more activities	9%	19%	-

Base: All HE/FE who have collaborated with other academic institutions in last 12 months (HE: 46 respondents, 44 institutions, FE: 52 respondents, 50 institutions) or other parties (HE: 46 respondents, 44 institutions, FE: 52 respondents, 50 institutions)

Overall, respondents from UK HE and FE institutions indicated that, with the exception of digitisation of collections, they have been at least twice as likely to collaborate in each of these activities with other academic institutions as with other suppliers or external organisations.

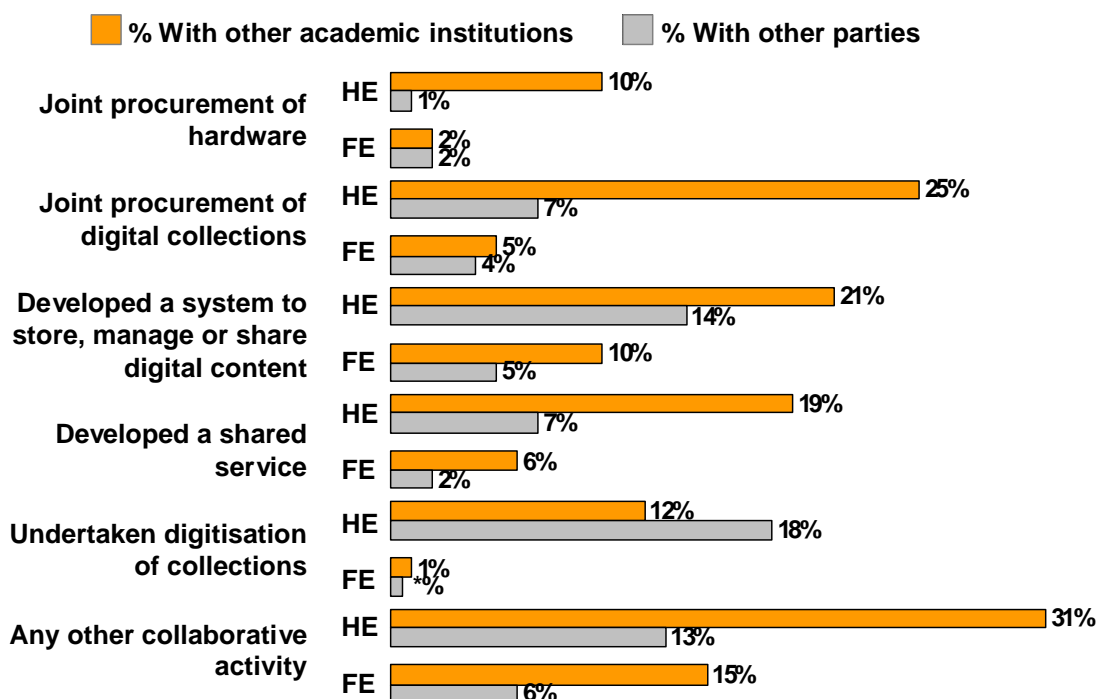
Q In the last 12 months, have you worked collaboratively on any of the following activities with either (a) other academic institutions or (b) any other parties (e.g. NHS, British Library, software supplier)?



Base: all HE/FE (296 respondents, 284 institutions)

However, when looking at the sectors separately, HE is significantly more likely to have collaborated with other institutions than with other parties, whereas FE would seem more reluctant in general about collaborating with other academic institutions or other organisations.

Q In the last 12 months, have you worked collaboratively on any of the following activities with either (a) other academic institutions or (b) any other parties (e.g. NHS, British Library, software supplier)?



Base: all HE (91 respondents, 83 institutions)

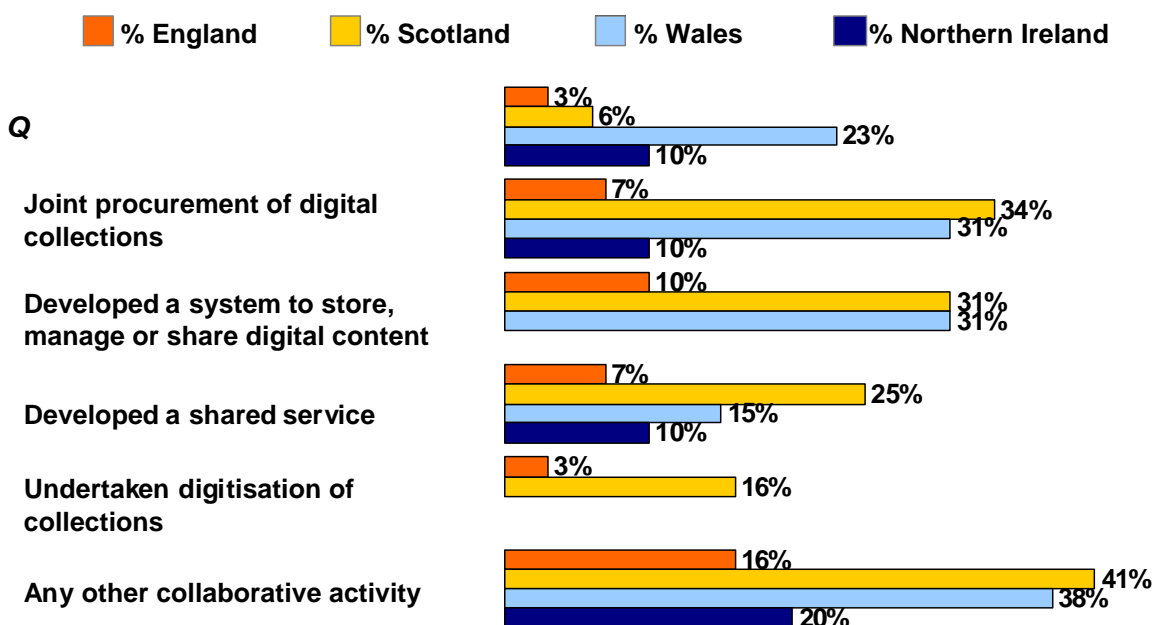
Base: all FE (205 respondents, 201 institutions)

There are particular and significant characteristics to the collaboration with other academic institutions between the HE and FE sectors, notably:

- HE is 12 times more likely to collaborate on digitising collections than FE
- HE is 5 times more likely to jointly procure hardware or digital collections than FE
- HE is 3 times more likely to collaborate in developing a shared service than FE

Looking at the differences between UK regions England would appear not to take a lead in collaboration with either other academic institutions or with other parties. For Scotland and Wales, although they generally collaborate more, their preference is still for collaboration with other academic institutions.

Q *In the last 12 months, have you worked collaboratively on any of the following activities with other academic institutions? HE and FE combined*



Base: all England (243 respondents, 234 institutions)

Base: all Wales (13 respondents, 13 institutions)

Base: all Scotland (33 respondents, 32 institutions)

Base: all N.Ireland (7 respondents, 5 institutions)

Many institutions use networks and consortia already established to procure hardware and content. Respondents also indicated they used these groups for other aspects of collaboration, information and developmental activities. Listed below are a range of other collaborative activities and links that institutions mentioned:

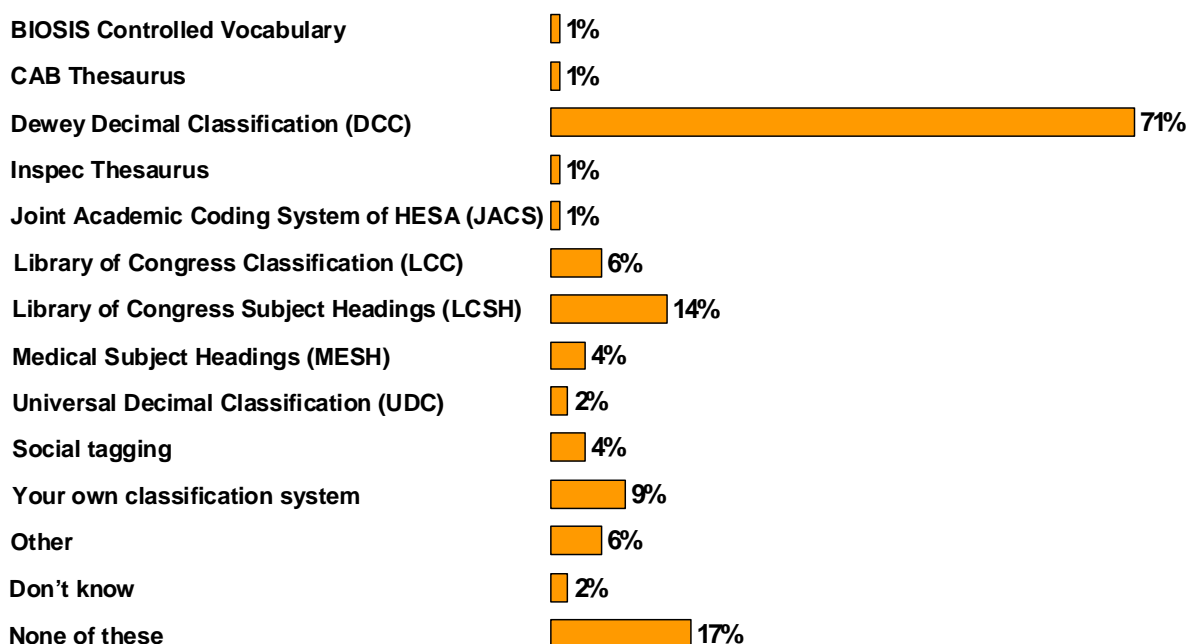
- Benchmarking (94 Group - libraries)
- Collaborative print storage, locally in Scotland via SCURL (CASS) and within the UK, via UKRR project
- CPD, Inductions, sharing good practice
- Designing new LRC - visits to other colleges to find examples of best practice
- FLARE consortium with BL and academic institutions to coordinate development of collections and services. With Society of Legal Scholars to develop law library standards. With charity, British and Irish Legal Information Institute to make primary legal materials available free on Internet for citizens

- Inter-lending schemes with FE & public libraries
- NHS Education for Scotland Cross-sectoral Project looking at use of health Information Plus database
- SuperBook Project, led by the UCL School of Library, Archive and Information Studies, with the aim of investigating users' attitudes to and use of electronic books
- SCONUL Access;;WAM25 - HEFCE funded feasibility study involving 6 libraries in the M25 consortium to investigate providing walk-in access to e-resources for visitors
- Scottish Library Innovation Funded project - SLiCpod (mobile learning) dissemination to other organisations and colleges
- SCURL consortial purchasing initiatives for books and serials.
- Shared LMS with local public libraries
- UKRR, LOCKSS, CASS (Collaborative Academic Store for Scotland)
- Virtual Academic Library project

Managing and sharing electronic resources

Of the twelve classification systems shown to respondents, the Dewey Decimal Classification is the dominant classification system employed by libraries and resources centres of HE and FE institutions to support access to electronic resources.

Q *Do you use any of the following classification schemes or technologies to support access to your library's/LRC's electronic resources?*

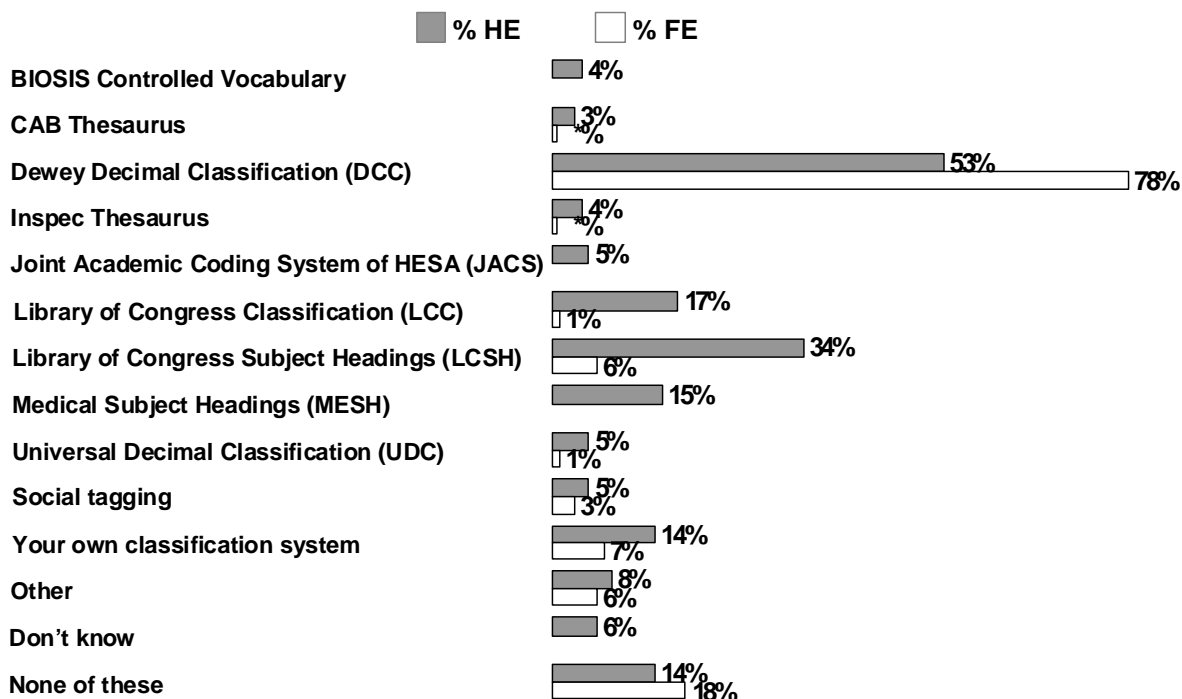


Base: all HE/FE (296 respondents, 284 institutions)

There are significant differences between HE and FE in their use of classification systems. The HE community employ a wider variety of classification and notably systems that support particular subjects and resources for example Library of Congress Subject Headings and Medical Subject Headings, whereas the FE community use not only a smaller range of classification but their use is eclipsed by the Dewey Decimal Classification. For example,

45% of HEIs use 2 to 4 different schemes or technologies to classify compared with 17% of FE institutions.

Q Do you use any of the following classification schemes or technologies to support access to your library's / LRC's electronic resources?



Base: all HE (91 respondents, 83 institutions)

Base: all FE (205 respondents, 201 institutions)

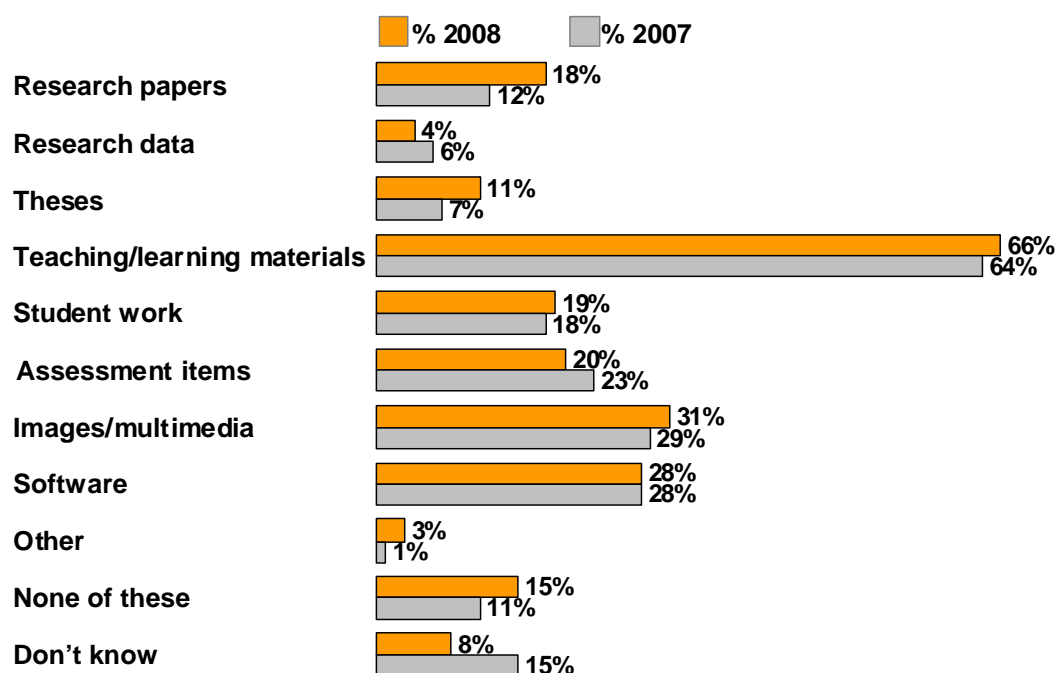
Managing and sharing of electronic resources within institutions continues to be an important issue and to build on the survey of last year respondents were again asked whether any [of the following] types of material, produced by members of their institution, are systematically managed and shared electronically somewhere in their institution.

Heads and senior library / LRC staff from 77% of UK Higher and Further Education institutions indicated that material, produced by members of their institution, is systematically managed and shared electronically somewhere within their institution. Staff from 8% of institutions were unsure that materials were shared or managed in this way and 15% felt that no materials were shared or managed in this way.

There are no statistically significant differences between the responses in 2008 compared with those in 2007 with one (encouraging) exception, that there are significantly fewer respondents this year (reduction of almost a half) that were unsure of what their institution was doing in relation to electronically shared or managed materials (2008 – 8% compared with 2007 – 15%). This decrease is evident in both HE and FE (HE has fallen from 13% to 5% and FE from 16% to 9%).

Teaching and learning materials continue to be by far the most electronically shared or managed materials within HE and FE institutions.

Q Are any of the following types of material - produced by members of your institution - systematically managed and shared electronically somewhere within your institution/organisation?



Base: all HE/FE (2008: 296 respondents, 284 institutions. 2007: 342 respondents, 292 institutions)

In 2008, there was no difference between HE and FE in the proportions that claim to manage and share materials electronically (77% in both), but the types of materials shared or managed differs markedly; HE institutions are significantly more likely to manage and share research papers and theses while FE institutions are significantly more likely to manage and share teaching and learning materials, software, assessment items and student work.

There were no statistically significant differences within sector between 2007 and 2008.

Table 6: Are any of the following types of material - produced by members of your institution – systematically managed and shared electronically somewhere within your institution/organisation?

	HE		FE	
	2007	2008	2007	2008
Research papers	37%	48%	3%	5%
Research data	14%	6%	4%	2%
Theses	19%	30%	2%	3%
Teaching/learning materials	50%	52%	69%	72%
Student work	13%	11%	20%	22%
Assessment items	12%	11%	27%	24%
Images/multimedia	26%	29%	30%	32%
Software	23%	15%	30%	33%
Other	2%	2%	1%	3%
None of these	16%	18%	10%	14%
Don't know	13%	5%	16%	9%

Base: All HE/FE (2008: 296 respondents, 284 institutions, 2007: 342 respondents, 292 institutions).

In both years, respondents were further asked for details on how and / or where these materials are managed and shared.

The following table shows the reported changes in the most commonly mentioned methods used to electronically share and manage materials produced by members of their institutions between 2007 and 2008 but also reveals some of the subtle changes, in the respondents' views, of the names of the services and methods employed (Intranet is also referred to as college intranet and may also be synonymous with central college network, additionally Moodle, Blackboard and WebCT as VLEs are often mentioned by name rather than within the category of VLE).

Table 7: Please provide some basic details on where and/or how they are managed and shared?

	2008	2007
Teaching / learning materials	<ul style="list-style-type: none"> • VLE (138) • Intranet (17) • Moodle (16) • Network / Network drives (13) • Repository (unspecified) (8) • WebCT (6) • IT/computing services/ ICT/ Central IT services (3) • Library Management System (3) 	<ul style="list-style-type: none"> • VLE (135) • Intranet (16) • Shared drives (12) • (FE) College intranet (9) • Moodle (9) • L & T department / unit (7) • Network / Network drives (6) • Repository (unspecified) (6) • Blackboard (6)
Images / multi-media	<ul style="list-style-type: none"> • VLE (41) • Network / network drives (10) • Repository (unspecified) (13) • Intranet (8) • Image archive (6) • IT/computing services/ ICT/ Central IT services (3) • SharePoint (3) 	<ul style="list-style-type: none"> • VLE (33) • Intranet (6) • Shared drives (6) • Network/ network drives (6)
Software	<ul style="list-style-type: none"> • IT/computing services/ ICT/ Central IT services (15) • Network / Network drives (23) • VLE (15) • Intranet (6) 	<ul style="list-style-type: none"> • IT/computing services/ ICT/ Central IT services (19) • Network / Network drives (16) • VLE (10) • (FE) College network / Central college network (6)
Assessment items	<ul style="list-style-type: none"> • VLE (34) • Intranet (7) • Moodle (2) 	<ul style="list-style-type: none"> • VLE (38)
Student work	<ul style="list-style-type: none"> • VLE (32) • Intranet (5) • Network / Network drives (4) • Repository (unspecified) (2) 	<ul style="list-style-type: none"> • VLE (30)
Research papers	<ul style="list-style-type: none"> • Repository (unspecified) (34) • Digital Repository (3) • Intranet (3) 	<ul style="list-style-type: none"> • Institutional repository run by library/ library repository (10) • Repository (unspecified) (5)
Theses	<ul style="list-style-type: none"> • Repository (unspecified) (21) • Library (4) 	<ul style="list-style-type: none"> • Library (5) • Institutional repository run by library/ library repository (4) • Repository (unspecified) (3)
Research data	<ul style="list-style-type: none"> • VLE (3) • Intranet (3) • Repository (unspecified) (2) 	<ul style="list-style-type: none"> • VLE (2) • Repository (unspecified) (2) • Intranet (2) • Library (2) • Website/web pages (unspecified) (2)

Support and advice for searching for content

Almost 9 out of 10 heads and senior library / LRC staff from UK Higher and Further Education institutions indicate that their institution provides, to both staff and students, support and help in effectively searching the web and the institution's library or resource centre for content. None claim to offer support and advice purely to staff rather than students, although around one in ten do offer it just to students and not staff.

Differences exist between the sectors on the support given in effectively using the web. Here HE institutions are significantly more likely to offer support to both staff and students than FE.

Table 8: Does the library/LRC service within your institution/organisation offer any support or advice to staff or students on how to most effectively search the web or the library's/LRC's systems for content?

	All HE/FE	HE	FE
Web			
Yes, for both staff and students	86%	93%	82%
Yes, but only for staff	-	-	-
Yes, but just for students	10%	5%	12%
No	4%	2%	4%
Don't know	1%	-	1%
Library's/LRC's systems			
Yes, for both staff and students	89%	89%	90%
Yes, but only for staff	1%	2%	-
Yes, but just for students	9%	8%	9%
No	1%	-	1%
Don't know	-	-	-

Base: All HE/FE (HE: 296 respondents, 284 institutions)

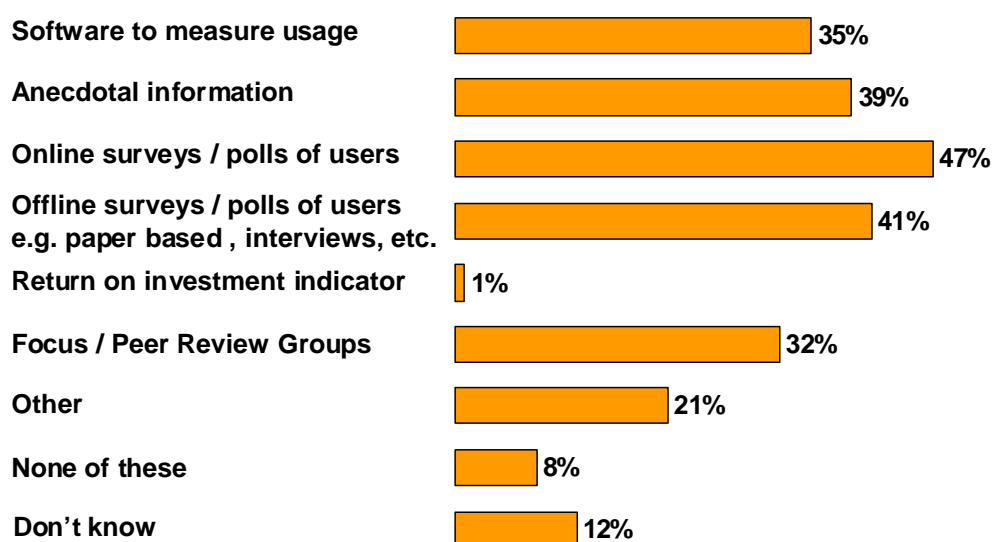
Respondents reported a range of techniques employed to provide advice and support to staff and students in making effective use of the web and also the institution's library / LRC systems. These ranged from structured input to induction programmes and weekly sessions to on demand support, in groups, face to face, over the telephone or through staff available within the library or LRC. Support ranged from virtual online materials to hardcopy printed guides and handouts. The topics covered include i-Skills, Information Fluency, Information Literacy as well specific support in accessing particular resources.

Measuring the impact of electronic resources

Four out of five of heads and senior library / LRC staff from UK Higher and Further Education institutions indicated that their institution measured the impact of online content or materials on teaching, learning and research with online surveys / polls of users being the most popular.

In the 'other' category, respondents mentioned Athens statistics, statistics provided by suppliers and usage statistics.

Q *Does your institution/organisation use or do any of the following to measure the impact(s) online content or materials are having on teaching, learning or research activities within your institution/organisation?*



Base: all HE/FE (296 respondents, 284 institutions)

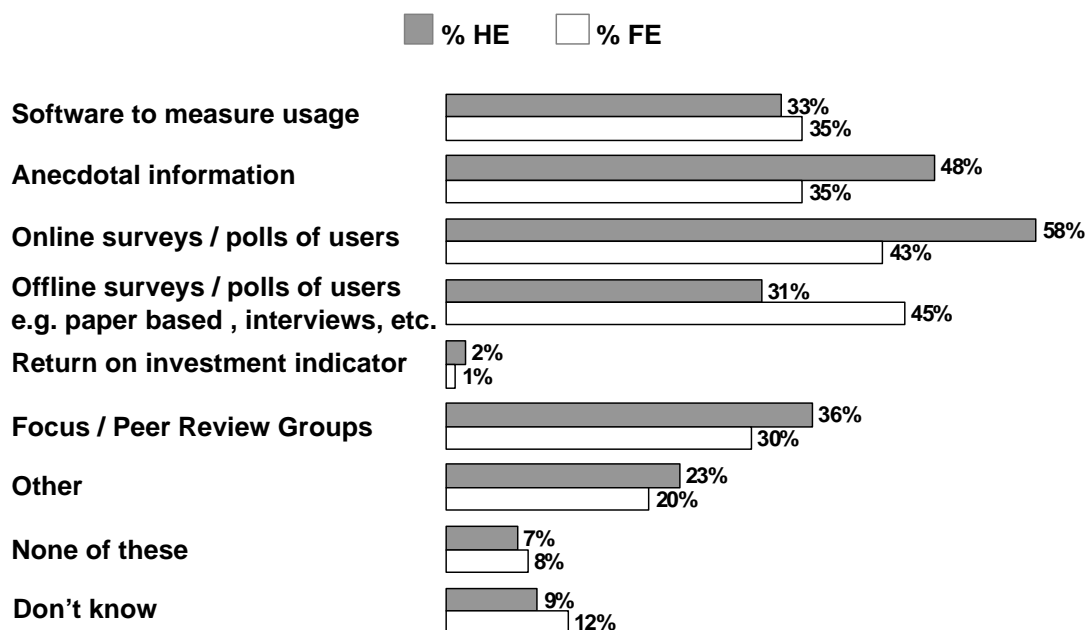
Although not part of this survey, it is interesting to speculate why institutions generally do not measure 'return on investment' of online content or materials in relation to teaching, learning or research:

- Are the metrics difficult to define?
- Are the results inappropriate, unreliable or meaningless?
- Are online content and materials not considered as investments?

Looking at the sectors separately there are significant differences in the popularity of particular survey instruments, namely,

- HE favourability for anecdotal Information and online surveys / polls of users
- FE favourability for offline surveys / polls of users e.g. paper-based, interviews etc.

Q Does your institution/organisation use or do any of the following to measure the impact(s) online content or materials are having on teaching, learning or research activities within your institution/organisation?



Base: all HE (91 respondents, 83 institutions)

Base: all FE (205 respondents, 201 institutions)

When asked if there is anything your library / LRC needs in terms of tools and standards which would help measure usage, effectiveness or impact that online resources are having on its users, around half declined to comment. However, of those that responded the top nine mentions are listed below. The most significant differences between the sectors are standardisation and consistent measurement, and more user-friendly data.

- Advice / training / education about what is available (18)
- Assistance with interpretation/analysis of data (12)
- Usage statistics/Usage data from all e-services/suppliers (10)
- Standardisation / consistent measurement (e.g. Not set by individual publishers) (10) (HE – 9, FE – 1)
- Measure of online resource usage / measure the impact of online resources (8)
- Benchmarking tool / Benchmarking with other colleges/institutions (8)
- More user friendly data (5) (HE – 5, FE – 0)
- A standard toolkit (5)
- Guidelines on what is being measured (5)

JISC consultation exercises

Heads and senior library / LRC staff from almost half of UK Higher and Further Education institutions have responded to a JISC consultation on licensing or procurement of content for the academic sector. However, the Higher Education sector is significantly more likely to have responded to such consultations than their FE counterparts. It is possible that the responses from the FE sector may illustrate a lack of awareness or appreciation of the relevance of such consultations.

Table 9: Have you ever responded to a JISC consultation exercise on licensing or procurement of content for the academic sector? (e.g. a consultation sent by JISC Collections?)

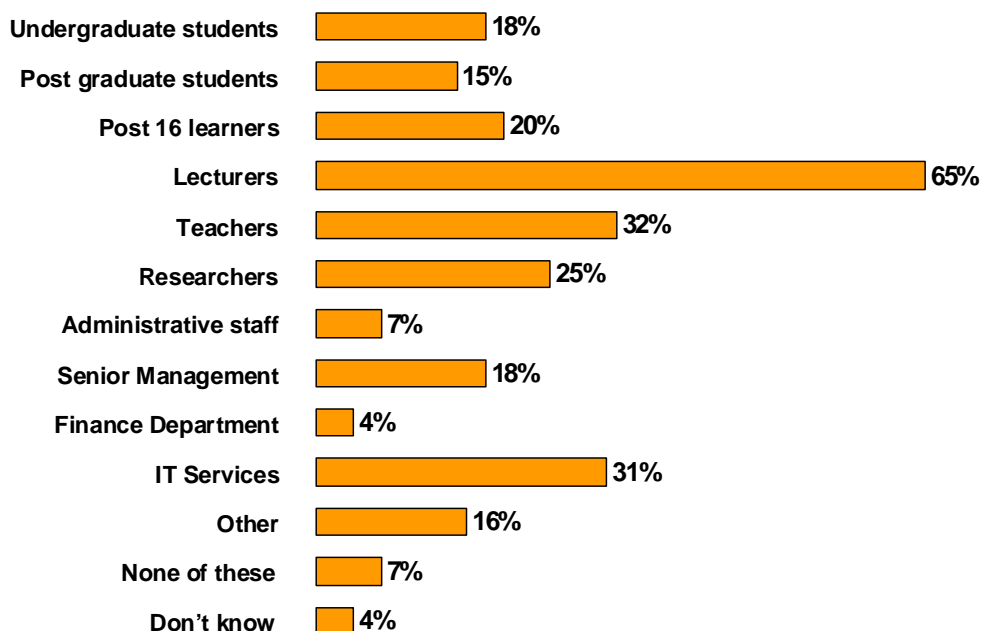
	All HE/FE	HE	FE
Yes	46%	64%	38%
No	30%	21%	33%
Don't know	24%	15%	28%

Base: All HE/FE (HE: 296 respondents, 284 institutions)

Although based on small sample sizes, there is a higher incidence of respondents from HE/FE institutions in Wales reporting they have responded to a consultation compared with the other countries (Wales 62%, England 47%, Scotland 34% and Northern Ireland 20%). None of these differences however, were statistically significant.

The heads and senior library / LRC staff from UK Higher and Further Education institutions that have responded to a consultation exercise from JISC on licensing or procurement of content generally consulted or attained data from institution staff more than students (80% have consulted teaching staff, 51% other staff and only 36% students or learners). Very few don't consult with or get data from any of these stakeholders when responding.

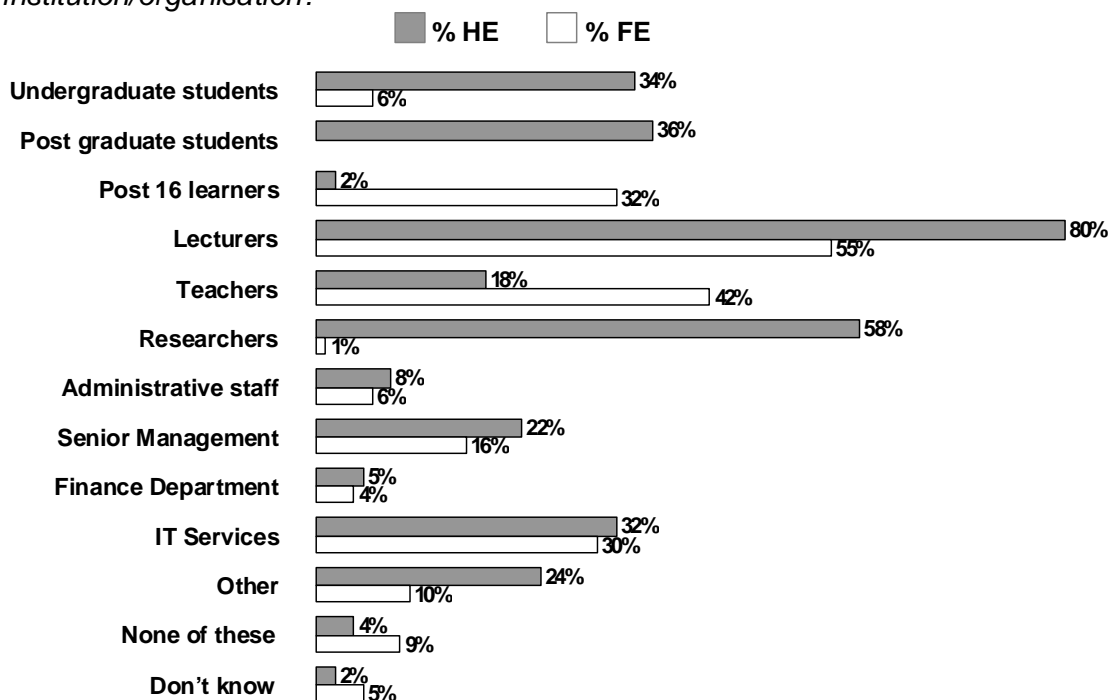
Q When forming your response to a JISC consultation, do you generally consult with or use data from any of the following potential users of the content within your institution/organisation?



Base: all HE/FE answering 'YES' to "have you responded to a JISC consultation?" (134 respondents, 130 institutions)

When looking at the HE and FE sectors separately there are significant differences in the responses, however on closer inspection these differences are probably more related to the terminology and vocabulary used by the sectors for their academic staff and of their students and learners. Almost a quarter of respondents from HE consulted other stakeholders than those referenced in the questionnaire.

Q When forming your response to a JISC consultation, do you generally consult with or use data from any of the following potential users of the content within your institution/organisation?



Base: all HE answering 'YES' to "have you responded to a JISC consultation?" (57 respondents, 53 institutions)
 Base: all FE answering 'YES' to "have you responded to a JISC consultation?" (77 respondents, 77 institutions)

In HE, 84% have consulted teaching staff, 69% other staff and 39% students or learners compared with 78%, 39% and 34%, respectively in FE. The following table shows the methods used for collecting information to inform a JISC consultation exercise on licensing and procurement of content for the academic sector:

Table 10: Methods used to gather information by institutions for JISC Consultation exercise on content licensing and procurement

	All HE/FE	HE	FE
Anecdotal discussions	61%	69%	55%
Analysis of usage statistics	54%	66%	45%
Online surveys / polls of users	25%	29%	23%
Offline surveys / polls of users	21%	21%	21%
Peer review groups	14%	12%	15%
Other	12%	10%	14%
None of these	7%	7%	8%
Don't know	3%	4%	2%

Base: All HE/FE responding to whether they used the listed methods to gather information from institution stakeholders when responding to a JISC consultation exercise on licensing or procuring content for the academic sector (HE: 53 respondents, 50 institutions, FE: 66 respondents, 66 institutions)

The only statistically significant difference between the sectors is in the area of analysis of usage statistics to provide data for JISC content consultations. What is interesting is that, although the HE sector clearly uses analysis of usage statistics for this purpose, the sector appears less enthusiastic with using usage statistics for measuring the impact of online content or materials on teaching learning and research activities (see earlier chart).

Digitisation issues

During the past 12 months JISC has encouraged through conferences, collaboration and circulars a greater awareness within institutions of the role of digitisation, and additionally the role that institutions can play in establishing the priorities for future digitisation and enriching such digital resources beyond their analogue counterparts.

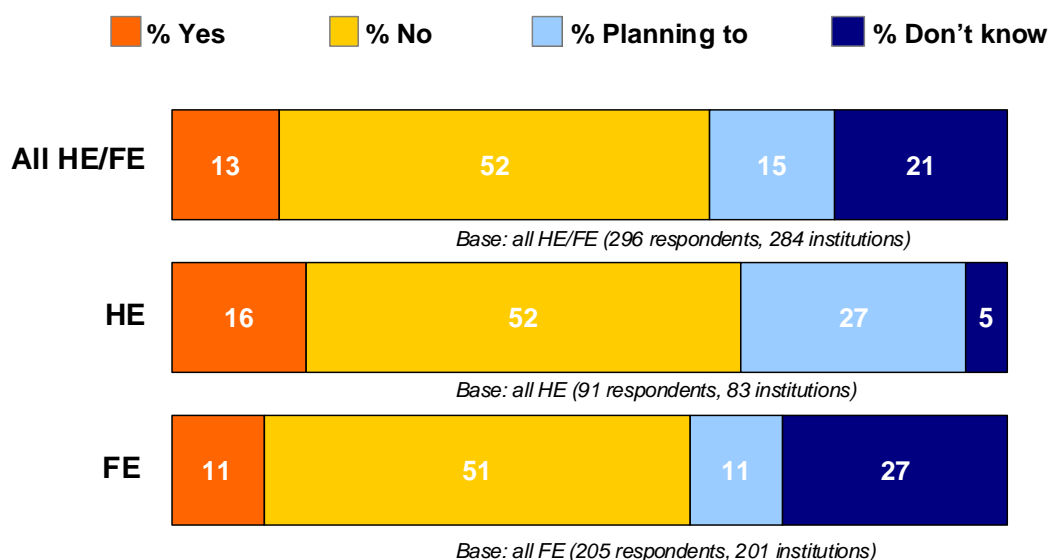
In summary:

- Heads/senior librarian and learning staff from over half of both FE and HE institutions revealed that their institution has no digitisation strategy in place. More HE institutions either have or are planning to put one in place compared with FE where almost a quarter are unsure if their institution has one already.
- Institutions with shared or integrated library/LRC services are significantly more likely to be planning a digitisation strategy than those where services operate discretely.
- HEIs are at least twice as likely as FE institutions to have a central catalogue or list of collections digitised so far. This difference is influenced by the large proportion (57%) of FE institutions who claim not to have digitised any collections to date.
- HEIs are clearly more ahead in identifying 'top priority collections' for digitisation than FE institutions, with almost two thirds either currently or intending to do so compared with less than a fifth in FE.
- Although only 16% of HEIs have a formal digitisation strategy in place, a much higher proportion (44%) is prioritising collections for future digitisation.
- A higher proportion of Scottish HE/FE institutions as a whole have or are planning to put a digitisation strategy in place, have a central list or catalogue of digitised collections, and generally feel more informed about these issues.

Strategy

Heads/senior librarian and learning staff from over half of UK FE and HE institutions revealed that their institution has no digitisation strategy in place. Respondents from a significantly higher proportion of HE than FE institutions are planning to put a digitisation strategy in place (27% vs 11%, respectively). Around a quarter of respondents from FE were not aware of a digitisation strategy at their institution.

Q Does your institution / organisation have a digitisation strategy in place?

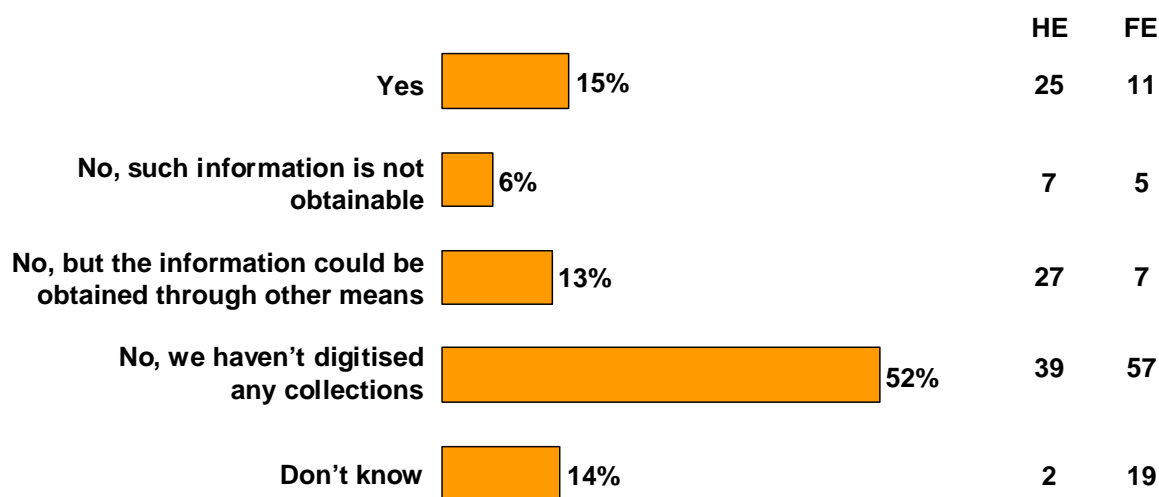


Respondents from institutions where library/LRC services are shared or integrated with other services such as IT, are significantly more likely to be planning a digitisation strategy than those from institutions where services operate discretely (23% vs 10%, respectively).

Interestingly, respondents from a significantly higher proportion of Scottish HE/FE institutions as a whole stated they have a digitisation strategy in place or are planning to do so than their counterparts in England (25% vs 11% said yes, and 31% vs 13% are planning to, respectively).

Higher Education institutions are at least twice as likely as FE institutions to have a central catalogue or list of collections digitised so far (25% vs 11%, respectively). This difference is influenced by the large proportion (57%) of FE institutions who claim not to have digitised any collections to date. Respondents from a further 27% of HEIs said despite not having such a catalogue, they would be able to obtain such information through other means.

Q *Does your institution / organisation have a central catalogue / list of the collections it has digitised so far?*



Base: all HE/FE (296 respondents, 284 institutions)

Although the survey did not seek to enquire about how long such cataloguing had been done, it may be that such processes and systems have been used for longer within HE and are therefore more embedded and mature.

The differences observed in FE may be due to a number of reasons, for example:

- It does not consider itself as having a role in digitisation
- It does not have the physical resources, finance or technology to digitise
- It does not consider its analogue resources as suitable for digitisation
- It relies on content provided by others
- It expects others to digitise content
- It is unable to utilise or recognise the benefit of digitised resources
- There is no perceived demand for such resources.

Again, Scotland appeared to be ahead of England in this area, with significantly more HE/FE institutions as a whole having a central list or catalogue of collections digitised to date (31%

vs 14%). No respondents from Wales or Northern Ireland reported that their institution has one either.

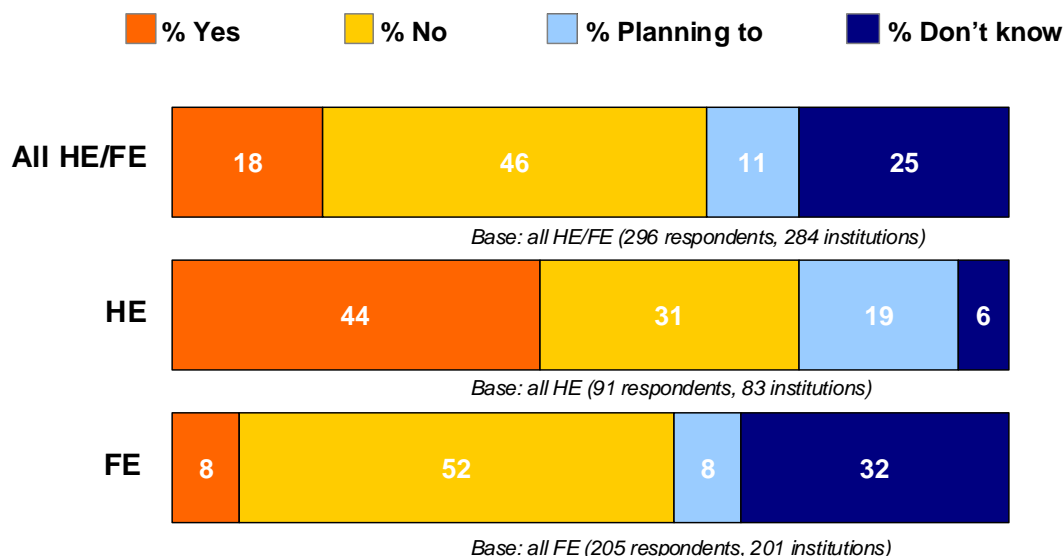
The apparently higher digitisation activity in Scottish HE/FE institutions appears to correlate neatly with the high proportion of head and senior librarian and learning staff feeling informed about the subjects of electronic data storage/digital repositories and digitised data collections (see Communications chapter).

Prioritising digitisation

Around a fifth of UK HE/FE institutions have identified ‘top priority collections’ they would like to digitise in the future, rising significantly to 44% of HEIs (compared with only 8% of FE institutions). A further 19% of HEIs are planning to identify such collections. Drawing these together (those active and those who intend to) almost two thirds of HE institutions will be engaging in the identification of ‘top priority collections’.

In FE the picture is very different with respondents from around one in six institutions indicating they have or intend to identify ‘top priority collections’ for future digitisation. This may further underline the reluctance, lack of resources (staff or financial) or lack of awareness of the FE sector to engage in digitisation or to appreciate or realise the benefits of such digitised resources.

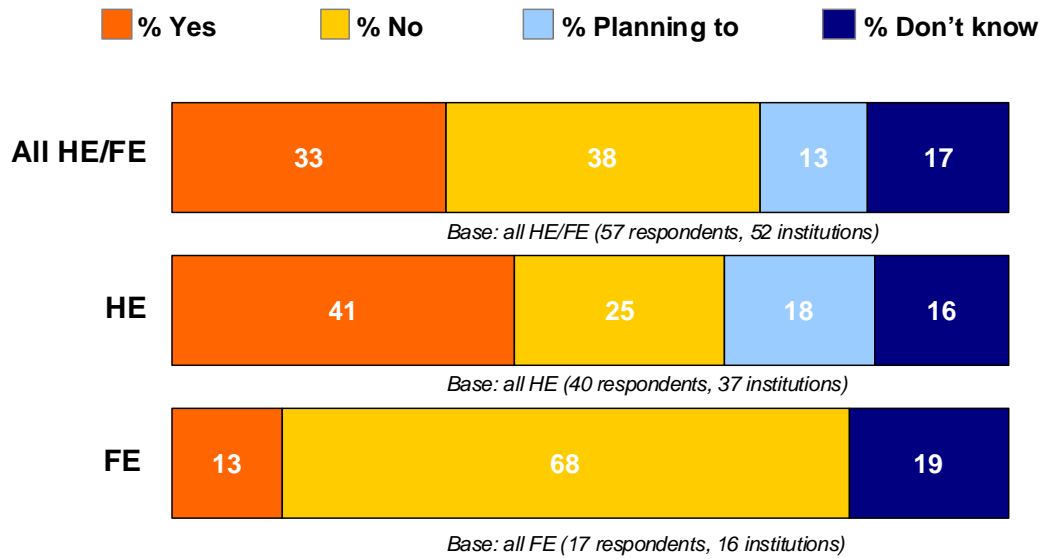
Q *Has your institution / organisation identified any “top priority collections” it would like digitise in the future?*



Looking at the data it is clear that despite only 16% of HEIs actually having a formal digitisation strategy in place, a much higher proportion (44%) are prioritising collections for future digitisation.

Respondents from institutions that have identified ‘top priority collections’ for digitisation, were asked about the consultation or feedback processes used to support the identification and prioritisation of such collections. It should be noted that this analysis was based on a relatively small number of respondents (57) and predominantly from HE institutions.

Q To your knowledge, has your institution / organisation conducted any user consultation, or received any user feedback, with regard to the collections to prioritise for future digitisation?



The results suggest that obtaining user feedback to help prioritise future digitisation is not currently conducted as a matter of course by the majority of HE or FE institutions. However, this situation may change in HE given some are planning to obtain such feedback in the future.

JISC Collections

The figures in this chapter are based on heads and senior librarian and learning staff from HE and FE institutions only. A total of five questions were asked in 2008, of which two were repeated from 2007; overall satisfaction with JISC Collections and satisfaction towards the terms and conditions of the two Model Licences (JISC Model Licence and NESLi2 Licence).

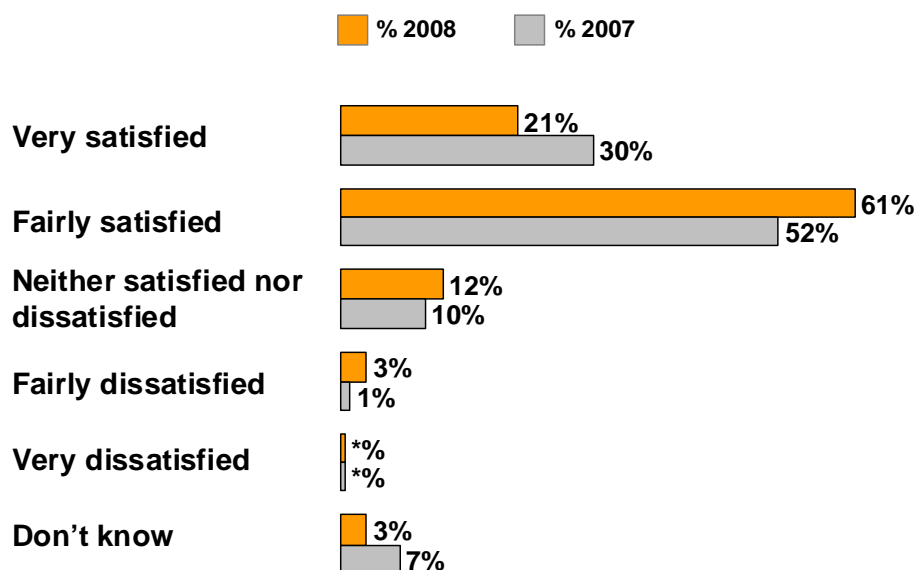
In summary:

- Satisfaction with JISC Collections across institutions as a whole remains high and largely unchanged since 2007. Satisfaction in HE has increased significantly since 2007 and is now higher than FE.
- Head and senior librarians/LRC staff from 45% of UK HE/FE institutions said they would be willing in principle to sign a letter of intent and commit in advance to deals involving consortia purchasing, while 50% were unsure and require more information to make this decision. Respondents from HE institutions were significantly more likely than their counterparts in FE to be willing to participate in this work.
- Both HE and FE felt that the top two priorities for acquiring new content were journals and e-books. Interestingly, FE ranked multi-media collections in third position.
- Awareness of the JISC Model Licence has increased significantly within HEIs since 2007, while awareness of NESLi2 has increased significantly within both sectors.
- Satisfaction with the JISC Model Licence is significantly higher within HE than FE, with the proportion 'very' satisfied in HE increasing from 18% to 25% in 2008.
- Satisfaction with the NESLi2 Model Licence across all institutions as a whole has remained unchanged since 2007. However, it has increased by 6 percentage points in HE and fallen by the same amount in FE.

Overall satisfaction

Overall satisfaction of the sector with JISC Collections remains high, particularly within HE. Head and senior librarians/LRC staff from 82% of UK HE/FE institutions are satisfied that JISC Collections is negotiating favourable agreements. The strength of satisfaction has decreased however, with fewer respondents feeling 'very' satisfied and an increase in the proportion 'fairly' satisfied. Nevertheless, the overall proportion satisfied remains largely unchanged from 2007 (83%).

Q Overall, how satisfied or dissatisfied are you that JISC Collections is negotiating favourable agreements for the types of content your institution/organisation requires?



Base: all HE/FE (2008: 296 respondents, 284 institutions. 2007: 342 respondents, 292 institutions)

In 2008, overall satisfaction was significantly higher in HE than FE (with 90% vs 79% satisfied, respectively), as was the proportion 'very' satisfied. Satisfaction within HE has increased significantly since 2007 from 78% to 90%, while it has fallen, but not significantly, in FE (84% vs 79%). The significant decrease in the proportion of HE respondents who said 'don't know' in 2008 may suggest that the nature of the agreements JISC Collections is negotiating has become clearer to the community and their benefits more obvious.

Table 11: Overall, how satisfied or dissatisfied are you that JISC Collections is negotiating favourable agreements for the types of content your institution/organisation requires?

	HE		FE	
	2007	2008	2007	2008
Very satisfied	28%	32%	31%	17%
Fairly satisfied	50%	58%	53%	62%
Neither satisfied nor dissatisfied	10%	6%	9%	14%
Fairly dissatisfied	2%	2%	1%	3%
Very dissatisfied	-	1%	1%	-
Don't know	11%	*%	5%	4%

Base: All HE/FE (2008: 296 respondents, 284 institutions, 2007: 342 respondents, 292 institutions).

In 2008 there were no significant differences in satisfaction between heads and seniors or in whether the library/LRC service operates discretely or is shared/integrated with other services. Interestingly, satisfaction within HE has increased among both head (from 85% to 91%) and senior staff (from 65% to 88%) since 2007, while in FE it has increased with seniors (from 67% to 77%) but decreased with heads (from 88% to 79%).

Since 2007 there have been some differences in satisfaction between countries although none of have been statistically significant; in England 85% were satisfied in 2007 vs 80% in

2008, in Scotland 70% vs 88%, in Wales 74% vs 100% and in Northern Ireland 89% vs 90%. However, due to small sample sizes caution must be taken with these results.

Future priorities

JISC Collections is exploring options for consortia purchasing in order to get better discounts from publishers, which would mean libraries/LRCs participating in the signing of letters of intent prior to a deal and committing to that deal. Respondents were asked whether in principle, they would be willing to participate in this work if it meant getting better prices.

Head and senior librarians/LRC staff from 45% of UK HE/FE institutions said they would be willing in principle, while 50% were unsure and needed more information in order to make this decision.

Respondents from HE institutions were significantly more likely than their counterparts in FE to be willing to participate in this work (60% vs 39% of institutions, respectively). In contrast a significantly higher proportion of respondents from FE institutions need more information before they can commit, even in principle (55% vs 37%, respectively).

Table 12: In principle, would you be willing to participate in this work if it meant getting better prices (consortia purchasing described as above)?

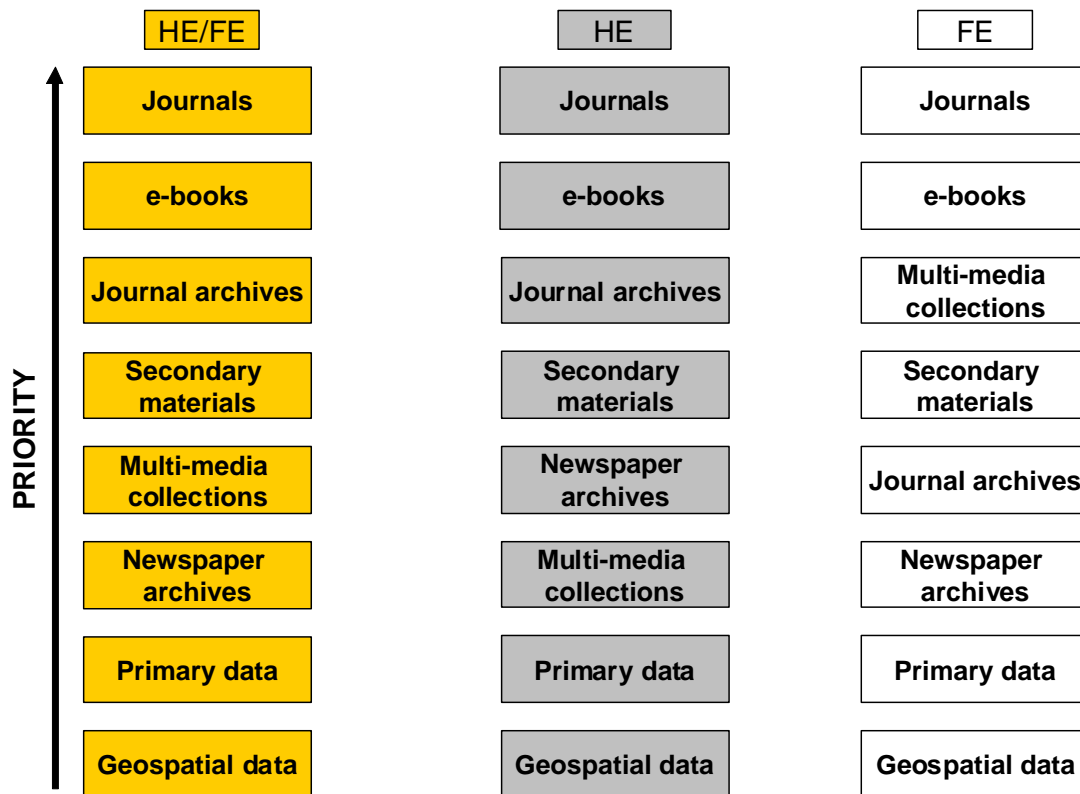
	All HE/FE	HE	FE
Yes	45%	60%	39%
No	3%	4%	3%
Not sure, need more information	50%	37%	55%
Don't know	2%	-	2%

Base: All HE/FE (296 respondents, 284 institutions)

Attitudes were fairly consistent across the various regions with those from Welsh or Scottish institutions ever so slightly agreeing more (around 50% compared with around 40% in England and Northern Ireland).

Given that JISC Collections must work with limited resources to cater for the needs of an increasingly diverse and demanding community, it is important for them to be able to prioritise the areas in which they acquire content through consultation with the sector. As such, respondents were presented with eight major areas JISC Collections is, or might be, acquiring content in, and asked to place them in order of priority, with regard to the future needs of their institution.

Order of priority, with regard to the future needs of institution/organisation



Base: all HE/FE (296 respondents, 284 institutions)

Journals followed by e-books were ranked as the highest priority and primary and geospatial data as lowest priority by both HE and FE, and across the four regions.

The priorities are ranked in a broadly similar fashion in HE as in FE, with the notable exception of FE placing multi-media collections in third position. Another key difference is that HE place much more importance on the top four areas compared with the bottom four based on the average ranking placed on each of the areas (the average ranking scores for the top four ranged from 2.1 to 3.9 compared with 5.4 to 7.0 for the bottom four. In contrast the average ranking scores for FE ranged from 2.6 to 4.2 compared with 4.3 to 7.3, respectively).

Model licences

The proportion of UK institutions whose head and senior librarian and learning staff are aware of the JISC Model Licence has remained fairly consistent since 2007. However, within HE there has been a significant increase in awareness from 87% to 98%. In contrast, awareness of the NESLi2 Licence across the sector as a whole has increased significantly from 66% to 76% with increases in both HE and FE. Despite falling by 8% since 2007, the proportion unaware of the NESLi2 Licence in FE in 2008 was almost seven times that of the level in HE.

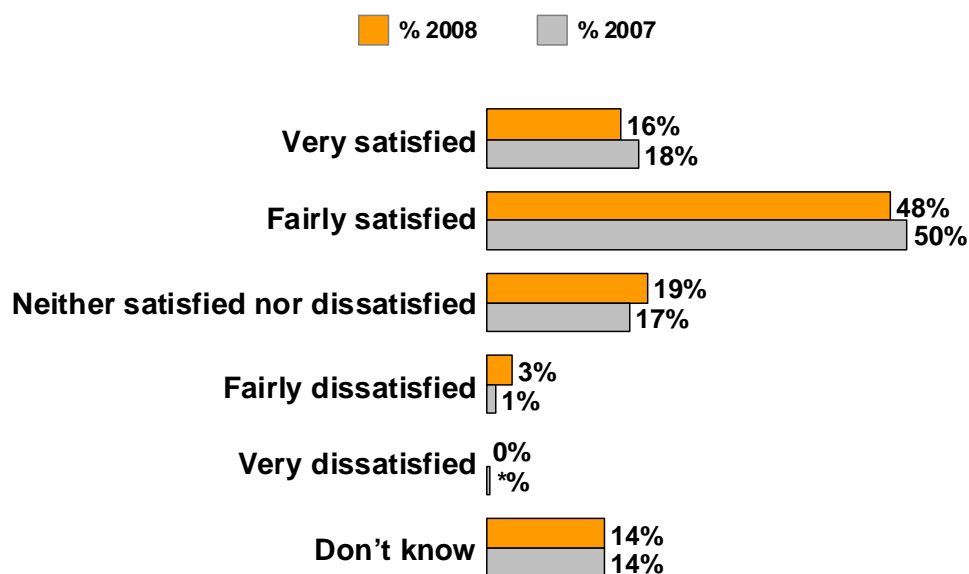
Table 13: Proportion aware of each of the Model Licences

	HE/FE		HE		FE	
	2007	2008	2007	2008	2007	2008
JISC Model Licence	87%	90%	87%	98%	87%	88%
NESLi2	66%	76%	84%	95%	59%	67%

Base: All HE/FE (2008: 296 respondents, 284 institutions, 2007: 342 respondents, 292 institutions).

Overall satisfaction towards the JISC Model Licence terms and conditions has not changed significantly among head and senior librarian and learning staff across the HE/FE sector as a whole since 2007.

Q How satisfied or dissatisfied are you with the terms and conditions of the JISC Model Licence?



Base: all HE/FE aware of JISC Model Licence (2008: 269 respondents, 257 institutions. 2007: 296 respondents, 253 institutions)

Satisfaction is significantly higher within HE than FE, with the proportion 'very' satisfied in HE increasing from 18% to 25% in 2008. In contrast satisfaction has decreased in FE from 63% to 55% (although this is not statistically significant).

Table 14: How satisfied or dissatisfied are you with the terms and conditions of the JISC Model Licence?

	HE		FE	
	2007	2008	2007	2008
Very satisfied	18%	25%	17%	12%
Fairly satisfied	63%	58%	46%	43%
Neither satisfied nor dissatisfied	11%	9%	20%	24%
Fairly dissatisfied	1%	5%	1%	2%
Very dissatisfied	-	-	1%	-
Don't know	7%	4%	16%	18%

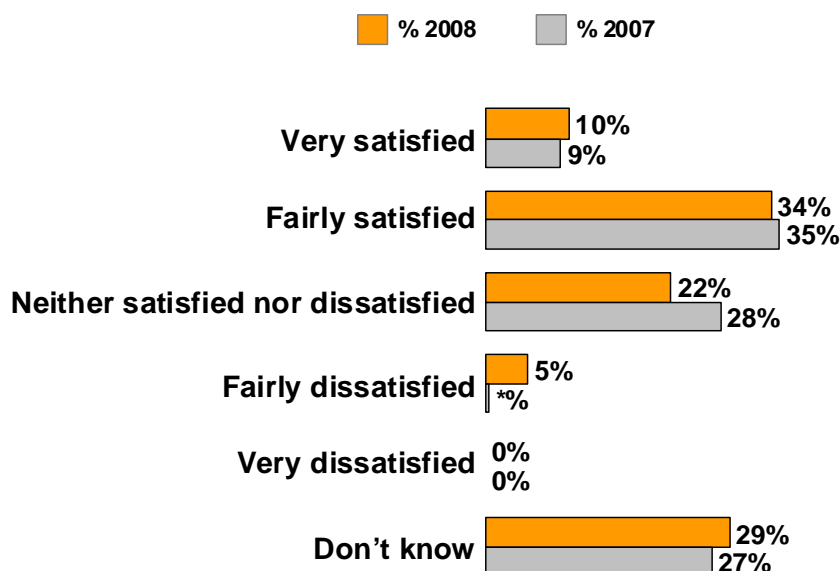
Base: All HE/FE aware of JISC Model Licence (2008: 269 respondents, 257 institutions, 2007: 296 respondents, 253 institutions).

There were no significant differences in overall satisfaction by country or job role (senior vs head) in 2008. However, satisfaction with the terms and conditions of the JISC Model Licence in 2008 did decrease with JISC Banding (78% of institutions banded A to D were satisfied compared with 71% of E to F, 63% of G to H and 51% of I to J).

In both years, around 30% of respondents were unsure about their satisfaction with the terms and conditions of the NESLI2 Model Licence (mostly within FE), possibly indicating that although head and senior librarian and learning staff within these institutions are aware of the licence, not all are aware of or involved in the actual terms and conditions especially within FE.

Overall satisfaction has remained largely unchanged since 2007 (43% vs 44% in 2008).

Q How satisfied or dissatisfied are you with the terms and conditions of the NESLI2 Licence?



Base: all HE/FE aware of NESLI2 Licence (2008: 225 respondents, 215 institutions. 2007: 239 respondents, 191 institutions)

As with the JISC Model Licence, there were significant differences in satisfaction with the NESLI2 terms and conditions between HE and FE. Satisfaction in HE has increased by 6 percentage points while in FE it has fallen by 6 points.

Table 15: How satisfied or dissatisfied are you with the terms and conditions of the NESLi2 Licence?

	HE		FE	
	2007	2008	2007	2008
Very satisfied	12%	19%	7%	4%
Fairly satisfied	56%	55%	24%	21%
Neither satisfied nor dissatisfied	19%	10%	32%	29%
Fairly dissatisfied	1%	8%	-	4%
Very dissatisfied	-	-	-	-
Don't know	11%	9%	36%	42%

Base: All HE/FE aware of NESLi2 Licence (2008: 225 respondents, 215 institutions, 2007: 339 respondents, 191 institutions).

There were no significant differences in overall satisfaction by country or job role (senior vs head) in 2008. Satisfaction with the terms and conditions of the NESLi2 Model Licence in 2008 also decreased with JISC Banding (73% of institutions banded A to D were satisfied compared with 45% of E to F, 36% of G to H and 29% of I to J). There were however, very high proportions of respondents (around a third) from institutions in Bands E to J who answered 'don't know' in terms of their satisfaction compared with only 4% of those from institutions in Bands A to D. This may suggest that within smaller institutions, fewer librarian and LRC staff are aware of or involved in the actual terms and conditions of the licence.

Respondents were asked whether JISC Collections/NESLi2 should be focusing on negotiating new agreements or on getting better deals for the current agreements.

Table 16: In your opinion, should JISC Collections/NESLi2 be focusing on negotiating new agreements or would you like them to focus on getting better deals for the current agreements?

	All HE/FE	HE	FE
Focus on negotiating <u>new</u> agreements	6%	10%	4%
A balance between the two	69%	77%	65%
Focus on getting better deals for <u>current</u> agreements	9%	9%	8%
Don't know	17%	3%	22%

Base: All HE/FE (296 respondents, 284 institutions)

The results show that heads and senior librarian/LRC staff from the majority of institutions (especially HEIs) feel there should be a balance between negotiating new agreements and getting better deals for current agreements. A significantly higher proportion of respondents from FE were unsure, possibly suggesting that greater clarity is required for this audience regarding the implications and benefits should JISC Collections pursue either course of focus.

Although response did vary by country, none of the differences were statistically significant.

Communication issues

In summary:

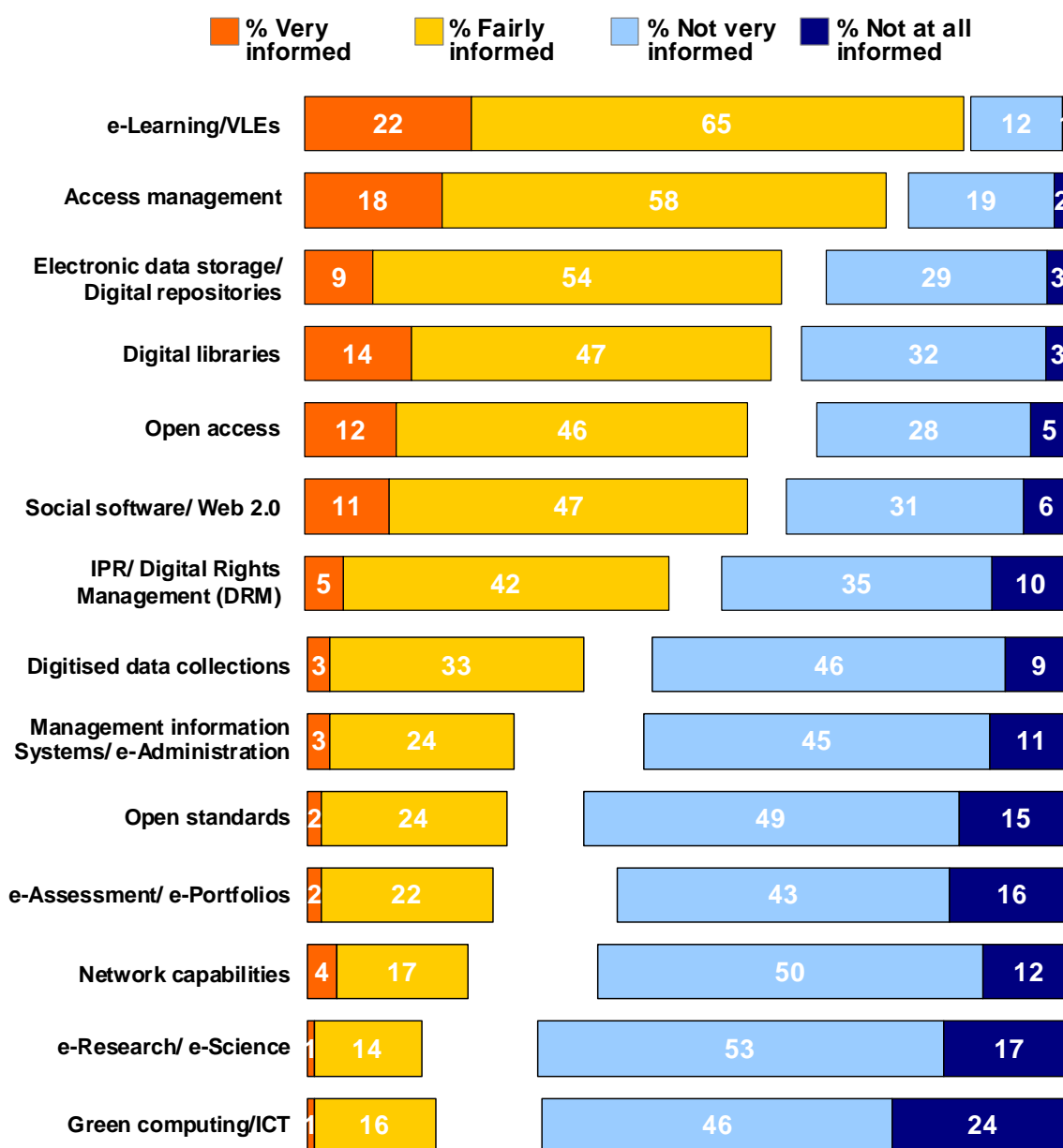
- Head/senior learning and librarian staff from UK institutions feel best informed about e-Learning/VLEs and subjects relating to the library and content management and storage, and least informed about network capabilities, e-Research/e-Science and Green computing/ICT.
- Generally the level of knowledge in these subjects among this audience has remained fairly similar to last year, with the following significant exceptions; increases in the proportion who feel informed about:
 - access management issues (from 62% in 2007 to 76% in 2008),
 - social software/Web 2.0 (from 37% to 57%)
 - open access (from 46% to 58%).
- And a significant decrease in proportion informed about
 - digitised data collections (from 47% to 37%)
- The highest awareness of JISC funded activity is in the areas of access management and e-Learning/VLEs. Since 2007, there have been significant increases in the proportions of institutions aware of JISC funding activity in access management, open access and social software/Web 2.0. HE is more likely to be aware of JISC funded activity than FE.
- Early evidence shows that after six months of activity, a sizeable number of institutions are aware of JISC's Libraries of the Future Campaign and feel it is helping inform them of the role of libraries and JISC's involvement. The Guardian supplement 'Libraries Unleashed' has been the most effective communications channel for raising awareness of the campaign.
- Overall around a third agreed it a good idea for academic libraries/LRCs to make use of social networking opportunities to engage students with their services (more so in FE than HE, but not significantly) but around a half were unsure (rising to almost 60% in HE).
 - The main reasons for being pro this idea in both HE and FE were that it allows libraries/LRCs to engage with students using a medium that is already widely used, up-to-date and popular among students. Importantly, social networking is something which students respond to.
 - For those against the idea the main reason was that it would be an intrusion on students' social space and therefore should be kept separate. A number in FE also responded that using such technologies may distract students' concentration and time towards socialising when they should be studying.
 - For those saying it depends, a similar mixture of reasons were given; whether students want it in the first place, whether it's perceived as invading their space (especially in HE) or attempting to be too 'trendy', whether it will distract from their studies (especially in FE), and difficulties in monitoring or supervision.
- Overall head and senior librarian and learning staff from around a third (37%) of institutions (43% in HE and 34% in FE) were aware of recent marketing innovations that help promote library or LRC services to students, academics or other users. Examples ranged from the more innovative (e.g. podcasts, blogs, social networking, Second Life) to the more traditional (e.g. newsletters, flyers, posters, promotional days).
- There have been significant increases in awareness and knowledge about the UK Access Management Federation across both HE and FE since 2007.

- Increases in awareness of Knowledge Exchange, SCA and e-Framework have been more modest, with changes occurring more at the 'know a little' or 'just heard of' level rather than increases in deeper understanding.
- Head and senior librarian and learning staff from 38% of UK institutions have heard of Knowledge Exchange Licensing. Of those that have heard of it, the majority know almost nothing about it.
- In contrast, awareness and knowledge of NESLi2 SMP is higher, particularly within HE where 42% claim to know a fair amount or more about it. In FE, although around half have heard of NESLi2 SMP, very few claim to know much detail about it.
- The use of cloud computing is currently low across the sector; slightly higher with HE than FE. Likelihood of use is also likely to be fairly low with only around one in ten institutions 'definitely' considering it.

Subject awareness

Respondents were asked how well informed they felt about the following subjects. The charts show in descending order, the subjects which head/senior learning and librarian staff feel most informed about. This question was asked in last year's survey although the category 'Green computing/ICT' was added in 2008. Changes in the degree to which this audience feels informed about the various subjects are highlighted below.

Q In general, how well informed, if at all, do you feel about the following subjects? 2008



Base: all HE/FE (296 respondents, 284 institutions)

As expected, head/senior learning and librarian staff from UK institutions feel best informed about e-Learning/VLEs and subjects relating to the library and content management and storage (although only around a third feel informed about digitised data collections), and least informed about network capabilities, e-Research/e-Science and Green computing/ICT.

Generally the level of knowledge in these subjects among this audience has remained fairly similar to last year, although three significant increases have occurred. Firstly, an increase in the proportion who feel informed about access management issues (from 62% in 2007 to 76% in 2008), secondly, in the area of social software/Web 2.0 (from 37% to 57%), and thirdly in the area of open access (from 46% to 58%).

The proportion feeling 'very' informed about access management has increased significantly from 9% to 18% across the HE/FE sector as a whole (within HE from 6% to 27%). The proportion feeling generally informed has also increased significantly in FE (from 58% to 75%). Other significant increases have occurred among heads of libraries and LRCs (63% to 78%) and within English institutions (from 61% to 75%). Indeed, librarian and learning staff from institutions within Wales, Scotland and Northern Ireland, all feel more informed in this area (although these increases are not statistically significant).

During the previous twelve months, there has been a great deal of activity in the area of access management, following the shift from a single proprietary service, Athens, to opening up the market to federated access management systems based on open standards which include open source solutions such as Shibboleth. Accompanying this change, have been a number of library-focussed outreach and communication activities by JISC including various workshops with SCONUL, an article in CILIP, a JISC briefing paper and a specific area on the JISC website, all of which are likely to have had an impact on increasing awareness and understanding of access management issues within the sector. Consequently, there have been increases in the proportions feeling informed about open standards (up slightly from 22% in 2007 to 26% in 2008) and open access (up from 46% to 58% over the same time period).

The level of knowledge of open access was considerably higher within HE than FE in 2007 and continues to be the case in 2008. However, FE has seen a significant rise from 37% to 48% in those feeling informed.

Knowledge of social software and Web 2.0 has increased across all sub-groups in the analysis, especially within HE (from 46% to 71%) and FE (34% to 52%).

In contrast, a significant decrease has occurred in the proportion feeling informed about digitised data collections (falling from 47% in 2007 to 37% in 2008). However, awareness in 2008 is significantly higher among respondents from HEIs compared with those from FE institutions (50% vs 31% respectively).

With the exception of three subject areas, head/senior learning and librarian staff from HE institutions are more likely to feel informed about these topics than those from FE institutions, significantly so in seven instances. The exceptions are e-Learning and VLEs (88% of FE vs 81% of HE institutions feeling 'very' or 'fairly' informed, respectively), MIS/E-Administration (28% vs 25%) and e-Assessment/e-Portfolios (27% vs 19%), although none of these three differences were statistically significant. In the case of MIS/E-Administration, the gap is closing, with 25% of respondents from HEIs now feeling informed compared with only 17% in 2007.

Table 17: Proportion ‘fairly’ or ‘very’ well informed about the following subjects

	HE	FE
<i>Base: All respondents</i>	91	205
e-Learning/Virtual Learning Environments (VLEs)	81	88
Digital libraries	82*	53
Access management	80	75
Electronic data storage/Digital repositories	79*	56
IPR/ Digital Rights Management (DRM)	56	44
Open access	81*	48
Digitised data collections	50*	31
Social software/Web 2.0	71*	52
Management information Systems/e-Administration	25	28
Network capabilities	22	20
e-Assessment/e-Portfolios	19	27
e-Research/e-Science	29*	10
Open standards	35*	22
Green computing/ICT	19	16

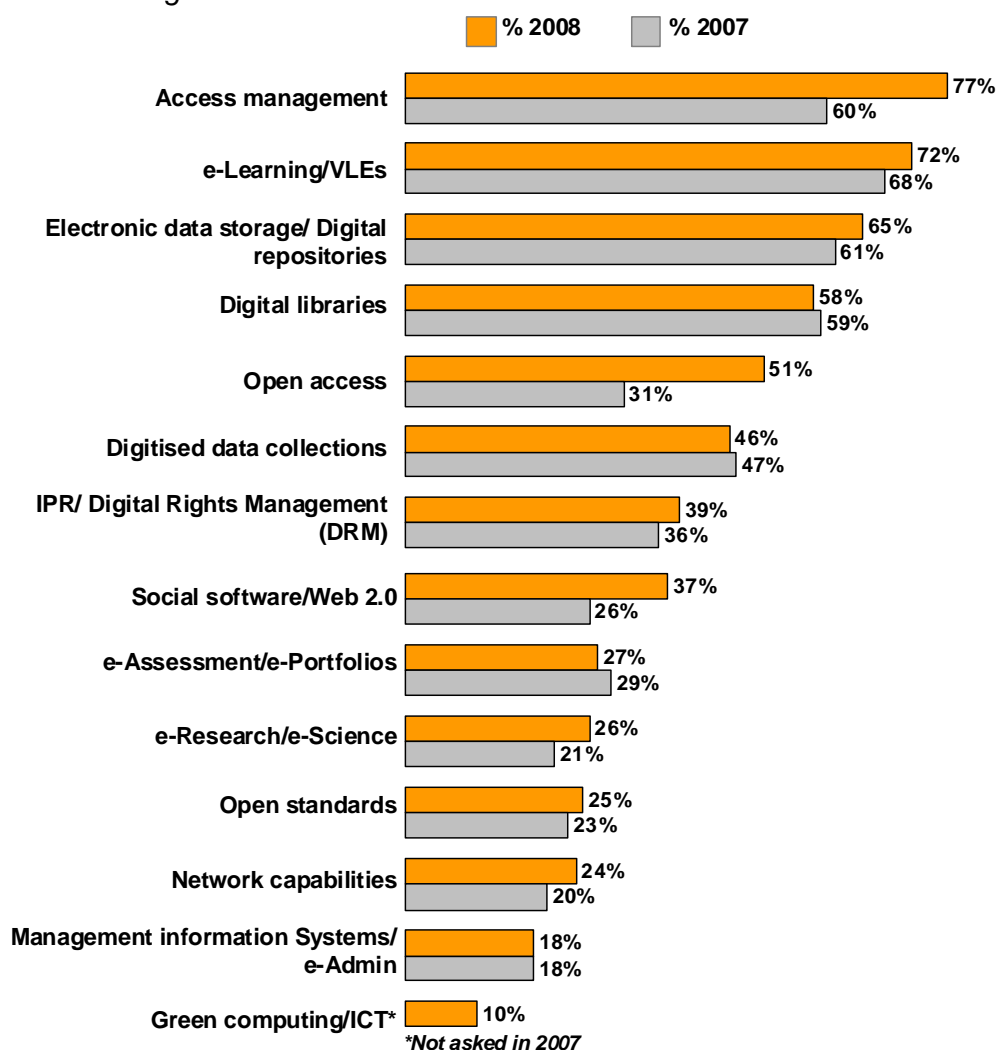
**Denotes a statistically significant difference at the 95% level.*

Head and senior librarian and learning staff from HE/FE institutions as a whole in Scotland appear to be more versed in a number of subjects compared with those in other countries. For example, electronic data storage/digital repositories and digitised data collections. This ties in with the digitisation activity discussed in the previous chapters. Higher proportions also feel informed about open access, IPR/DRM and open standards. In each of these subjects the difference between those feeling informed is significantly greater in HE/FE institutions in Scotland than England.

Awareness of JISC activity

Respondents were asked whether prior to this survey, they were aware of JISC funding any activity in the areas mentioned above. Head/senior learning and librarian staff from 91% of UK institutions are aware of JISC funding activity in at least one of these areas (3% perceived JISC not to be funding any, and 6% did not know). This figure is up slightly from 87% in 2007. The overall pattern of awareness largely follows that of subject knowledge, with the highest awareness of JISC funded activity occurring in the areas of access management and e-Learning/VLEs. Since 2007, there have been significant increases in the proportions of institutions aware of JISC funding activity in access management, open access and social software/Web 2.0.

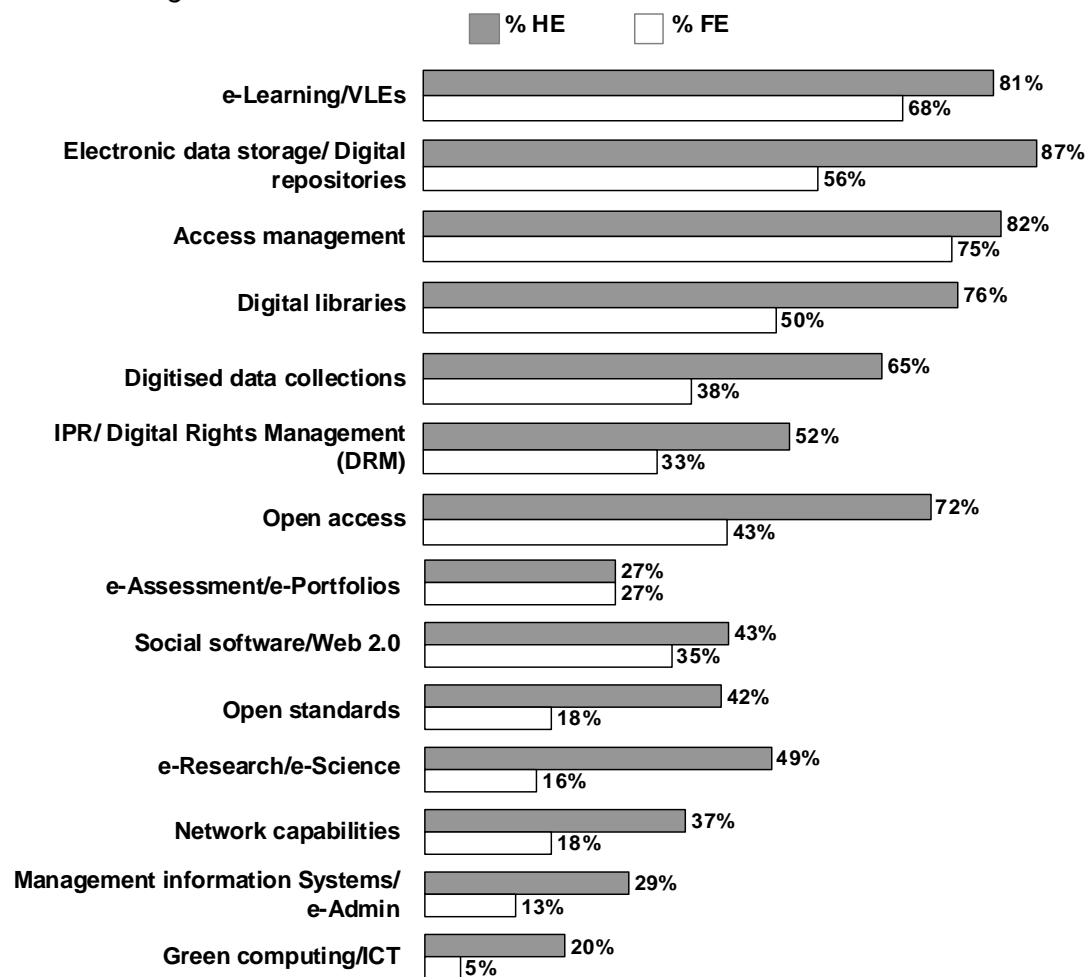
Q *Prior to this survey, were you aware that JISC is funding activity in any of the following areas?*



Base: all HE/FE (2008: 296 respondents, 284 institutions. 2007: 342 respondents, 292 institutions)

Although the proportion that are aware of any JISC funding activity is very similar between HE and FE institutions (93% and 90%, respectively), differences do occur with individual subjects. With the exception of e-Assessment/e-Portfolios, respondents from HE institutions were more likely to be aware that JISC is funding activities in each of the subject areas, significantly more so in 11 out of the 14 subjects.

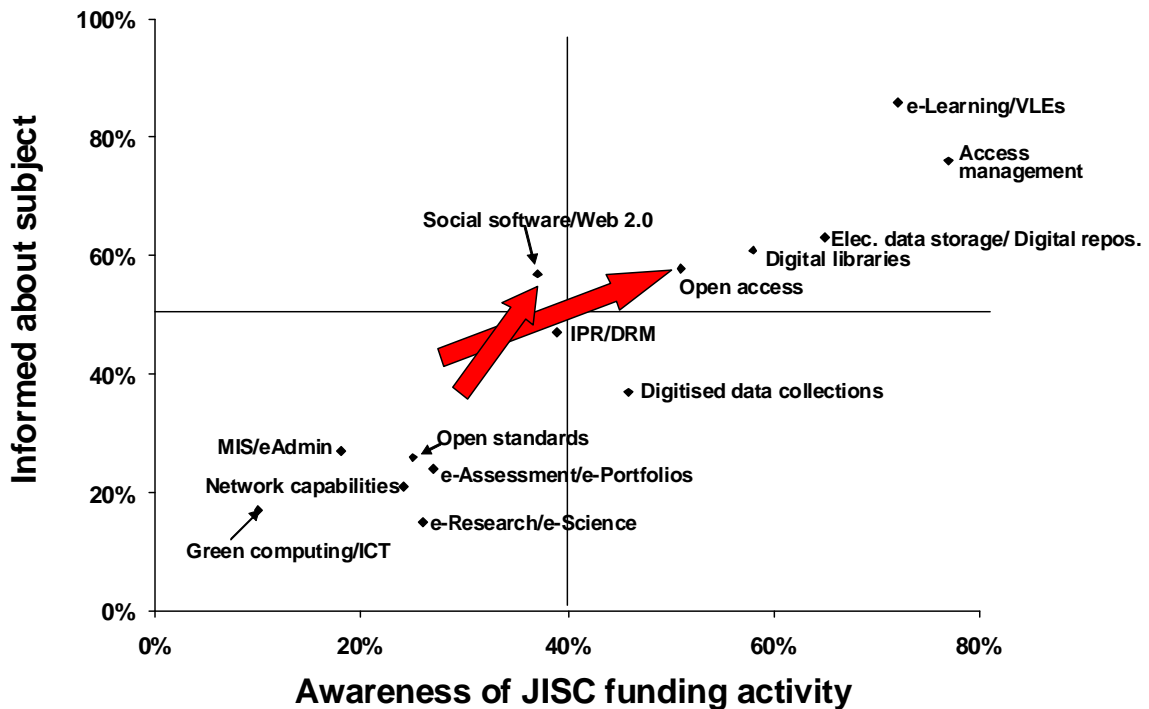
Q Prior to this survey, were you aware that JISC is funding activity in any of the following areas? 2008



Base: all HE/FE (296 respondents, 284 institutions)

The following chart plots the overall percentage who feel 'fairly' or 'very' informed about each subject against the overall proportion aware of JISC funding activity in that area for HE and FE combined.

HE and FE combined response



Base: all HE/FE (296 respondents, 284 institutions)

There is clearly a correlation between the two variables as might be expected, however, the data cannot tell us whether awareness of JISC funding activity is definitively driving the level of subject knowledge in that area or vice versa. Indeed it is likely not a direct 'cause and effect' relationship (i.e. other factors will influence each variable). However, what the chart does allow us to do is to easily identify subjects where JISC is funding significant activity but the degree to which this part of the community feels informed about that subject remains low, or their awareness of our work in that area is low. It may also help identify subjects where JISC could be concentrating efforts to help inform librarians and learning staff.

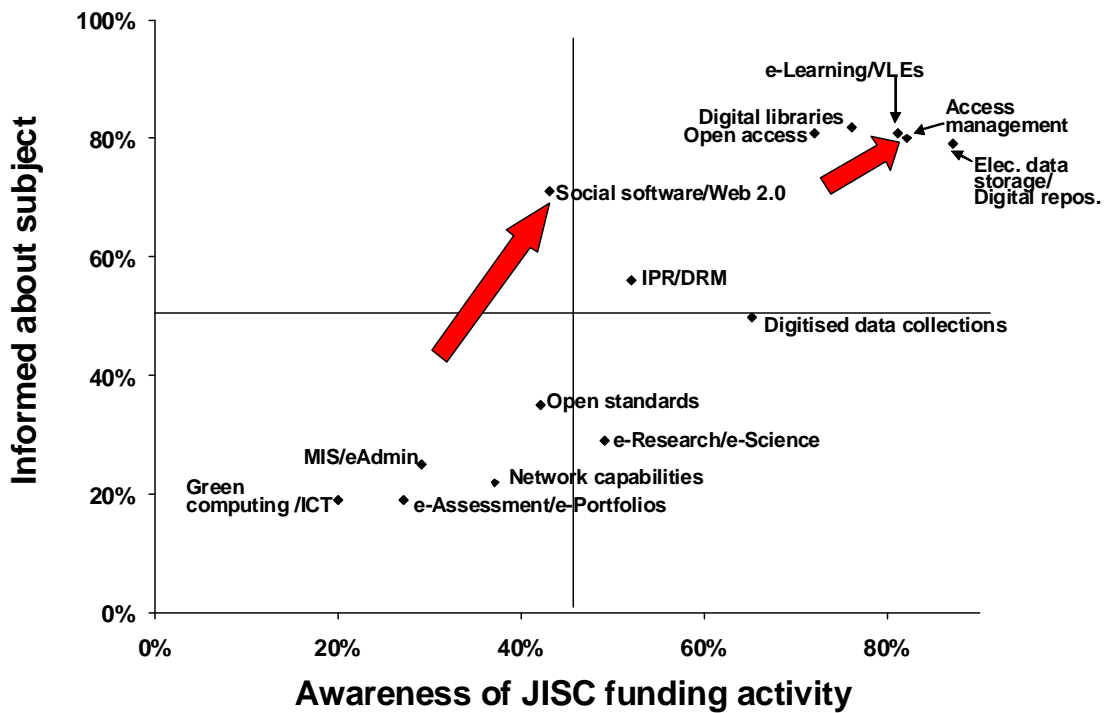
The scatter of data is very similar to 2007, with the exception of two subjects: Open Access and Social software/Web 2.0, where notable shifts have occurred as indicated by the arrows. Open Access has moved from the lower left quadrant (low awareness, less informed) to the top right quadrant (high awareness, more informed). This is encouraging given the investment JISC has made in this area, both financially and through communication activities. The second shift in Social software/Web 2.0 shows an increase in the sectors knowledge in this area but a more modest increase in awareness that JISC is funding activity in that area.

Ideally JISC would be aiming for all subject areas in which its activity is high to be in the top right quadrant or at least above the horizontal line.

As mentioned earlier, the awareness and knowledge of each subject is higher in HE than FE, and we would expect the different sectors to be more or less aware of different aspects of JISC's work. As such, the following two charts plot the same data separately for HE and FE institutions.

Awareness and level of knowledge among head/senior learning and librarian staff in HE institutions is as follows:

HE respondents only

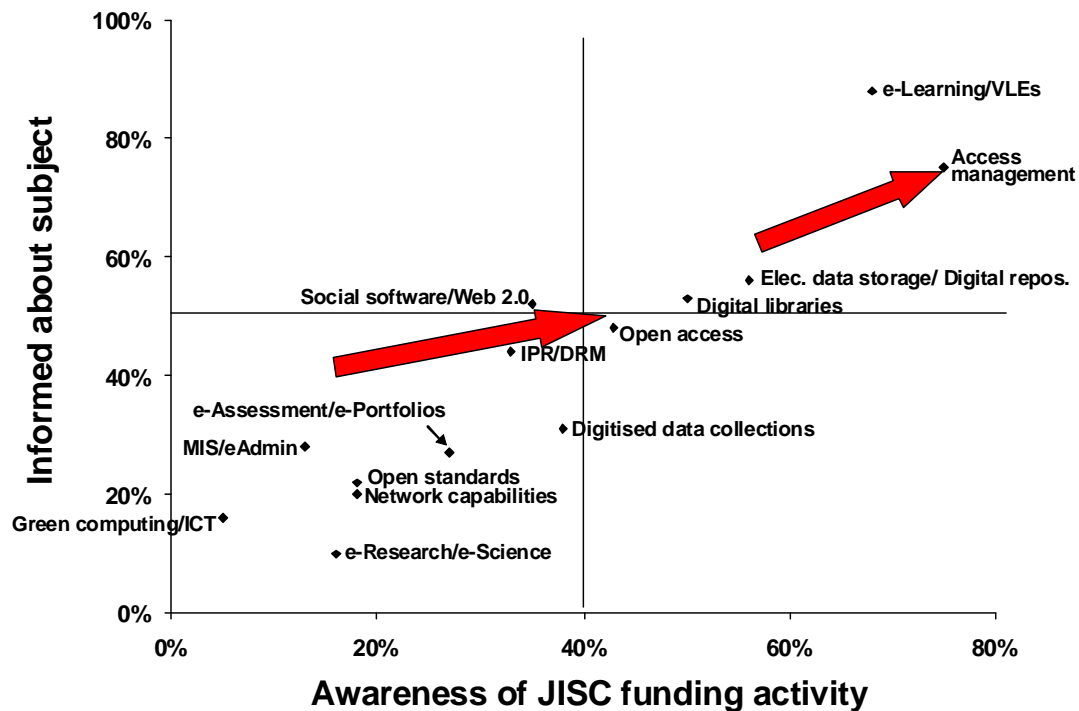


Base: all HE (91 respondents, 83 institutions)

Again, the pattern is broadly similar to 2007, with the exceptions of Social software/Web 2.0 and Access Management which have seen significant shifts in awareness and level of knowledge. Interestingly, although similar proportions of respondents from HE institutions are aware of JISC activity in IPR/DRM and e-Research/e-Science, approximately twice as many feel informed about the former than the latter.

Awareness and level of knowledge among head/senior learning and librarian staff in FE institutions is shown in the following chart. Increases in both the awareness and level of knowledge of Access Management and Open Access have increased noticeably since 2007.

FE respondents only



Base: all FE (205 respondents, 201 institutions)

In 2008, there was a higher degree of awareness of JISC funded activity in Scotland than other countries in the following areas (significantly higher compared with England): electronic data storage/digital repositories, digital libraries, open access, open standards, IPR/DPM and social software/Web 2.0.

Libraries of the Future Campaign

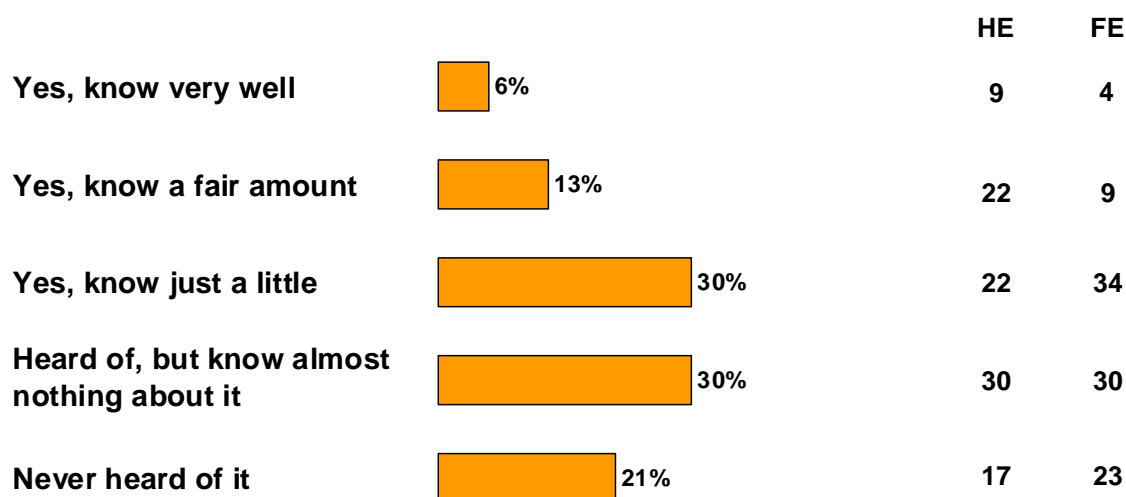
A module of questions was added to the survey to provide some early evidence for the awareness and impact JISC's Libraries of the Future Campaign is having on the sector. The campaign began in April 2008 and has so far included among other activities, a newspaper and online supplement in the Guardian, a Guardian microsite, webpages and a blog on the JISC website and various social networking activities.

Respondents were asked whether they were aware of any communication activities or initiatives carried out by JISC in the last two to three months which relate to libraries. This question was designed to elicit unprompted mention of the Libraries of the Future Campaign. Head and senior librarian and learning staff from 61% of UK institutions stated they were aware of something, significantly more so in HE than FE (77% and 55% of institutions, respectively). Overall, 17% said they weren't aware of any activities or initiatives and 21% were unsure.

A range of activities and initiatives were cited by respondents. Around a quarter (23%) of respondents mentioned Federated Access Management, and a further 8% Shibboleth or Athens. Both of these were mentioned significantly more often by FE respondents than HE respondents. Overall, 7% mentioned Libraries of the Future and a further 6% cited the Libraries Unleashed supplement in the Guardian. Therefore in total, around one in ten institutions spontaneously mentioned the campaign, fairly evenly spread between HE and FE.

When asked specifically whether they were aware of the Libraries of the Future Campaign, head and senior librarian and learning staff from 79% of UK institutions stated they had at least heard of it, although only 19% claimed to know a fair amount or more about the campaign. Respondents from around a fifth of institutions have not heard of the campaign.

Q Are you aware of JISC's Libraries of the Future Campaign?



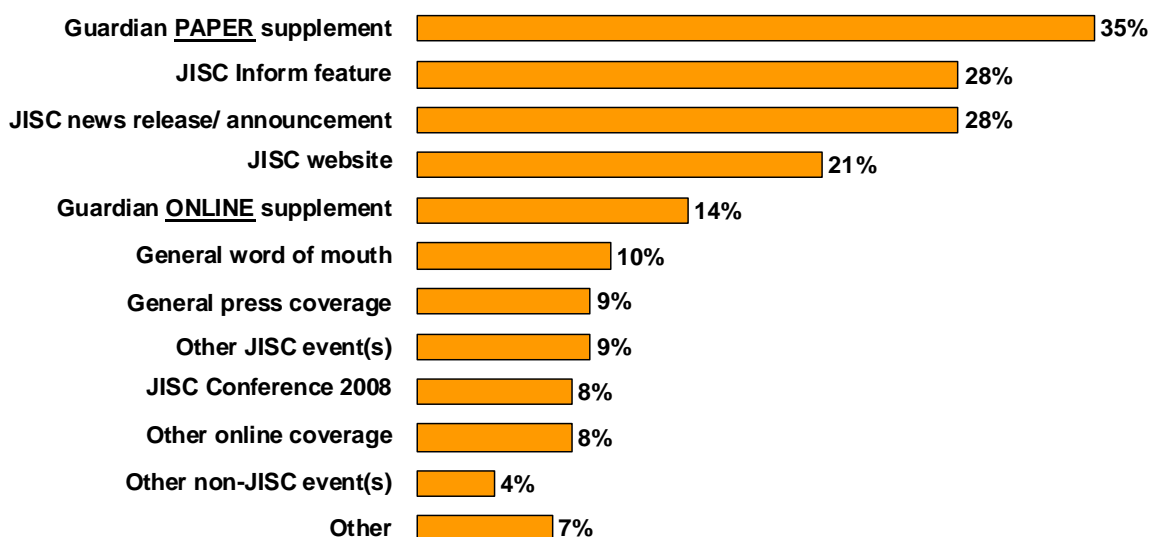
Base: all HE/FE (296 respondents, 284 institutions)

The proportion of head and senior librarian and learning staff who know a fair amount or more about the campaign is significantly higher within HE than FE (31% vs 13%, respectively). This difference is highlighted by five FE institutions who stated later in the survey that they feel the campaign is too focussed on HE and would like to see greater representation for FE in future activities. Awareness of the campaign is significantly higher among *heads* of libraries/LRCs than *senior* library or LRC staff (82% and 65% have at least heard of the campaign, respectively).

Awareness and knowledge of the Campaign across different countries is fairly similar with perhaps head and senior librarian and learning in Wales being slightly more knowledgeable.

In terms of making people aware of the campaign, the most popular channel was via the Guardian paper supplement (more so than the online version), followed by the feature in JISC Inform and a JISC news release/announcement.

Q How did you hear about it [Libraries of the Future Campaign]?



Base: all who have heard of LOTF campaign HE/FE (233 respondents, 224 institutions)

Head and senior librarian and learning staff from a significantly higher proportion of HE institutions than FE institutions heard about the campaign from the JISC Conference (15% vs 5%) or a JISC news release/announcement (39% vs 23%). Otherwise, there were no discernable differences in the effectiveness of the other channels in terms of making people aware of the campaign.

The following table shows the effectiveness or 'reach' of each of these communication channels used in the campaign in terms of the overall number of UK institutions reached not just those that have heard of the campaign as shown in the previous chart (i.e. the number hearing about it through each channel as a percentage of the *total* number of UK institutions).

Table 18: Total reach of each of the channels used in the Campaign (i.e. % of all institutions whose head/senior librarian and learning staff have heard about the campaign through these channels)

Channel	All HE/FE	HE	FE
Guardian paper supplement	28%	33%	26%
JISC news release/announcement	22%	33%	18%
JISC Inform feature	22%	18%	23%
JISC website (www.jisc.ac.uk)	17%	14%	17%
Guardian online supplement	11%	13%	10%
General word of mouth	8%	7%	8%
General press coverage	7%	10%	6%
Other JISC event(s)	7%	7%	7%
JISC Conference 2008	6%	13%	3%
Other online coverage (articles, blogs, forums etc)	6%	10%	5%
Other non-JISC event(s)	3%	2%	3%

Base: All HE/FE (296 respondents, 284 institutions).

In total, the Guardian supplement (online or paper) reached head and senior librarian and learning staff in 32% of *all* UK HE and FE institutions (37% of HE and 30% of FE).

Of those who are aware of the campaign, a half have carried out at least one action as a result of it. These actions varied from visiting the campaign web pages on the JISC website through to listening to a JISC podcast related to the campaign. Head and senior librarian and learning staff from a significantly higher proportion of HE institutions claim to have visited the JISC Libraries of the Future Blog than FE institutions (16% vs 5%), although none have written on it.

Table 19: Have you done any of the following as a result of JISC’s Libraries of the Future Campaign?

Channel	All HE/FE	HE	FE
Visited the Campaign web pages on www.jisc.ac.uk/librariesofthefuture	35%	30%	38%
Discussed the Campaign with colleagues	20%	25%	17%
Visited the Guardian's microsite for the Campaign	12%	17%	10%
Sought further information about a JISC project or programme relating to libraries	8%	9%	8%
Visited the JISC Libraries of the Future blog	8%	16%	5%
Listened to a JISC podcast related to the Campaign	3%	3%	3%
Written on your own blog about the Campaign	2%	-	3%
Written on the Libraries of the Future blog	1%	-	1%
Participated in any other formal or informal online discussion of the Campaign	1%	3%	1%
Other	4%	1%	5%

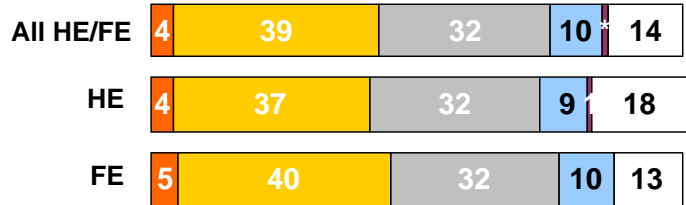
Base: All who have heard of LOTF campaign HE/FE (233 respondents, 224 institutions).

Respondents were asked to what extent they agreed or disagreed with two statements relating to the impact of the campaign in terms of informing the wider education sector on the role of libraries in the future and also in clarifying what JISC does in terms of supporting this. Around two fifths of respondents agreed that the campaign is informing the wider sector in both these areas (although to a slightly lesser degree in terms of informing the sector what JISC does to support the role of libraries in the future). Very few disagreed.

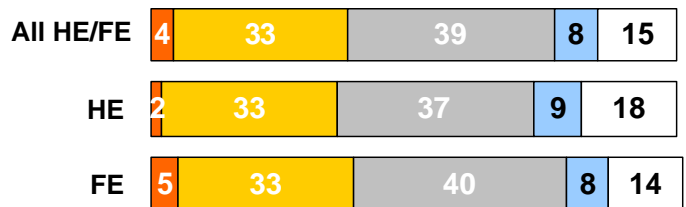
Q To what extent do you agree or disagree that JISC's Campaign has informed the wider education sector...?

■ % Strongly agree
 ■ % Tend to agree
 ■ % Neither agree nor disagree
 ■ % Tend to disagree
 ■ % Strongly disagree
 ■ % No opinion

...of the role of libraries in the future?



...of the range of things JISC does to support this?



Base: all who have heard of LOTF campaign HE/FE (233 respondents, 224 institutions)

Significantly more *heads* of libraries/LRCs agreed with both statements than *senior* staff (47% vs 19% agreeing re. the role of libraries in the future and 40% vs 22% with the range of things JISC does, respectively), perhaps suggesting that the pitch of the campaign is geared at a more senior level or a reflection of the fact that heads are significantly more likely to have heard of the campaign in the first place (82% vs 65%).

There were no significant differences in opinion between sector or by country.

Respondents gave a range of suggestions for issues which their libraries and LRCs are facing which they felt should be drawn to the Libraries of the Future debate. The most commonly mentioned areas were:

- Financial matters, funding and budgetary issues;
- New build issues and space design;
- Staffing issues, adequate staffing;
- Changing nature in which users interact with library services and resources;
- More representation/focus for FE;
- Collaboration issues.

Social networking

Given the prevalence in the use of social networking sites and software by students, respondents were asked whether they thought it a good idea for academic libraries/learning resource centres to make use of social networking opportunities to engage students with their services. Overall around a third agreed (more so in FE than HE, but not significantly) but around a half were unsure (rising to almost 60% in HE). Opinions across England, Wales, Scotland and Northern Ireland were very similar.

Table 20: Do you think it's a good idea for academic libraries/learning resource centres to make use of social networking opportunities such as Facebook as a means to engage students with library/LRC services?

	All HE/FE	HE	FE
Yes	34%	27%	37%
No	15%	15%	15%
It depends	44%	52%	41%
Don't know	7%	6%	7%

Base: All HE/FE (296 respondents, 284 institutions).

The main reasons given for being pro, anti or unsure whether using social networking opportunities in this way is a good idea were broadly similar between HE and FE.

The main reasons given by both sectors for being pro this idea were that it allows libraries/LRCs to engage with students using a medium that is widely used, up-to-date and popular amongst the student population. Importantly, social networking is something which students respond to.

"We need to modernise our promotion methods - and using Web 2.0 will better engage with students, as they are interested in this."

FE respondent

"As our students make heavy use of social networking, we should also use these media to provide services. So that we are part of their normal work flows."

HE respondent

"These sites are used extensively by students and increasingly by 'adults' too. It is important that libraries are seen to be developing with new technologies. However this needs to be balanced by ensuring that research and study opportunities are not removed, i.e. not removing books!"

FE respondent

"Social networking is a new and additional means of communication increasingly important to young people, if we are going to communicate with digital natives then we must communicate with them using methods that they understand and feel comfortable with."

FE respondent

Others felt that students are comfortable using the technology and it is important that library services adapt their approach to reflect this in a way that keeps libraries relevant and accessible to students so they derive maximum benefit from the resources available in their learning; as one respondent put it; "it shows we [the library] are willing to go to students".

"New medium for communication presenting new opportunities to position our services out to users."

HE respondent

“Since opening up social networking on our network we have seen greater footfall from students who would not normally frequent the LRC. The positive is the greater use of resources for social networking exposes many more people to learning resources - traditional, electronic and human. The negative is the issues of appropriateness of content in a 'broadcast' environment and managing demand equitably.”

FE respondent

In contrast, for those who perceived it not to be a good idea the main reason for both HE and FE was that it would be an intrusion on students' social space and therefore should be kept separate. There is a danger that students will perceive libraries or LRCs as being too 'trendy' and therefore won't take what they have to offer seriously.

“Social networking is just that. It's for personal private communication. It's not an appropriate place for institutional communication.”

HE respondent

“Students' social activities should remain just that, we have plenty of ways of communicating them without invading their social space. We should be making use of the learning environments that already exist.”

HE respondent

A number of FE respondents also stated that using such technologies may distract students' concentration and time towards socialising at times when they should really be concentrating on studying. Several respondents highlighted that there are better methods through which to engage students such as using existing VLEs or via face-to-face.

“Because it is all too easy for students to then remain on the site when they should be working - and we do not have enough PCs for this.”

FE respondent

There are also instances of FE institutions blocking or restricting the use of social software and a few comments relating to difficulties in monitoring or supervising the use of such a network should it be in place.

“Facebook is not always available in colleges and these sites are primarily used for fun/personal use than for college - isn't that what VLEs are for?”

FE respondent

“...at FE level I have found that the students haven't the maturity to regulate their use of these sites and have been open to inappropriate content and contact. I feel that a VLE or other means could be used better for this purpose.”

FE respondent

For those saying it depends, a similar mixture of reasons were given by respondents as to those who are against using social networking in this way; whether students want it in the first place, whether it's perceived as invading their space (especially in HE) or attempting to be too 'trendy', whether it will distract from their studies (especially in FE), and difficulties in monitoring or supervision. Fundamentally, many respondents felt that more investigation is needed to understand how social networking could be used in this way if it is to be successful.

Marketing innovations

Overall head and senior librarian and learning staff from around a third (37%) of institutions (43% in HE and 34% in FE) were aware of recent marketing innovations that help promote library or LRC services to students, academics or other users.

Examples were given for methods that have been used to promote services such as using Web 2.0 technologies (podcasts, blogs, social networking, SMS and even a creation of a virtual LRC on Second Life and using iTunes). Others cited more traditional methods such as newsletters, flyers, posters, handouts, promotional days, email, workshops and induction days. A couple mentioned the use of roadshows and displays on plasma screens.

"Currently developing an online book group and looking at using a social networking site to promote services."

FE respondent

"We provide regular 'Libraryland' emails to students and staff detailing new resources and services. A high proportion of our students are dyslexic so we find that emails consisting of images, text and weblinks to further information help to promote resources and allow students to locate items on the shelf."

HE respondent

"Library Facebook site, Library blog, links to share sites & RSS feeds, presence on Second Life."

HE respondent

"I am developing del.ic.ious as it looks more modern than the subject guides."

FE respondent

Respondents also gave examples of actual activities or services they have been involved in such as social events (coffee, drinks, food, music), book groups, joint events with other libraries and DVD loaning. A few mentioned the use of promotions or 'freebies' as a means of attracting users.

"Induction 2008 will include a free memory stick of useful resources and information as a trial."

HE respondent

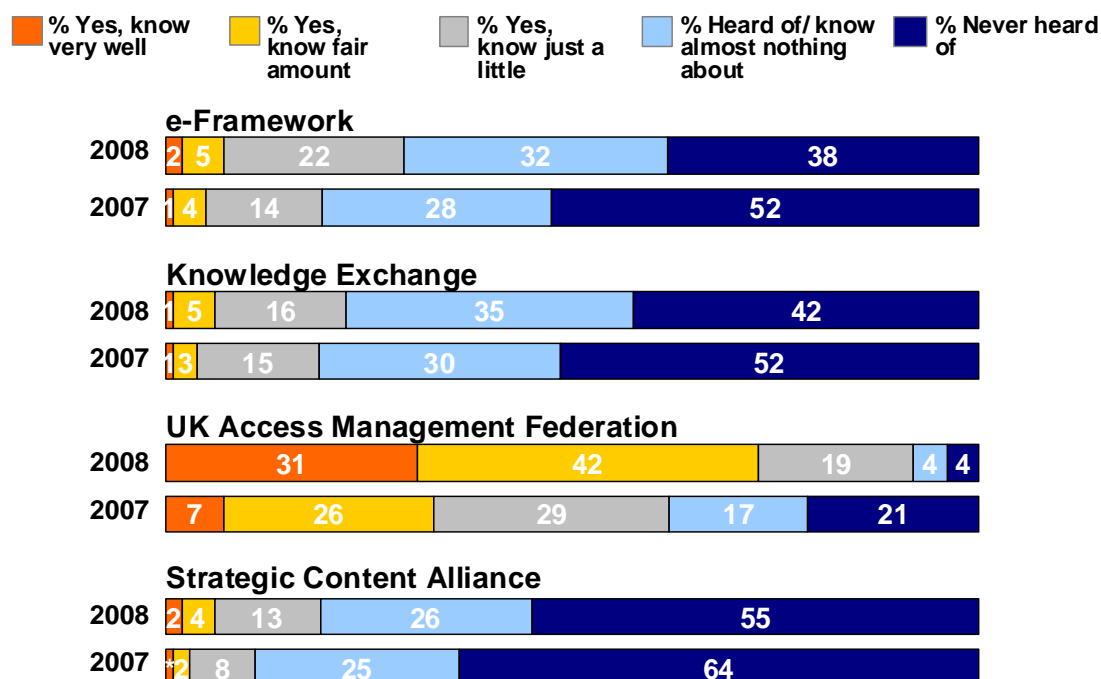
"Library bags for life."

HE respondent

Awareness of initiatives

Respondents were asked whether they had heard of six initiatives that JISC is involved in. Awareness of four of these were also asked in 2007; e-Framework, Knowledge Exchange, UK Access Management Federation and the Strategic Content Alliance (SCA).

Q Have you heard of any of the following initiatives?

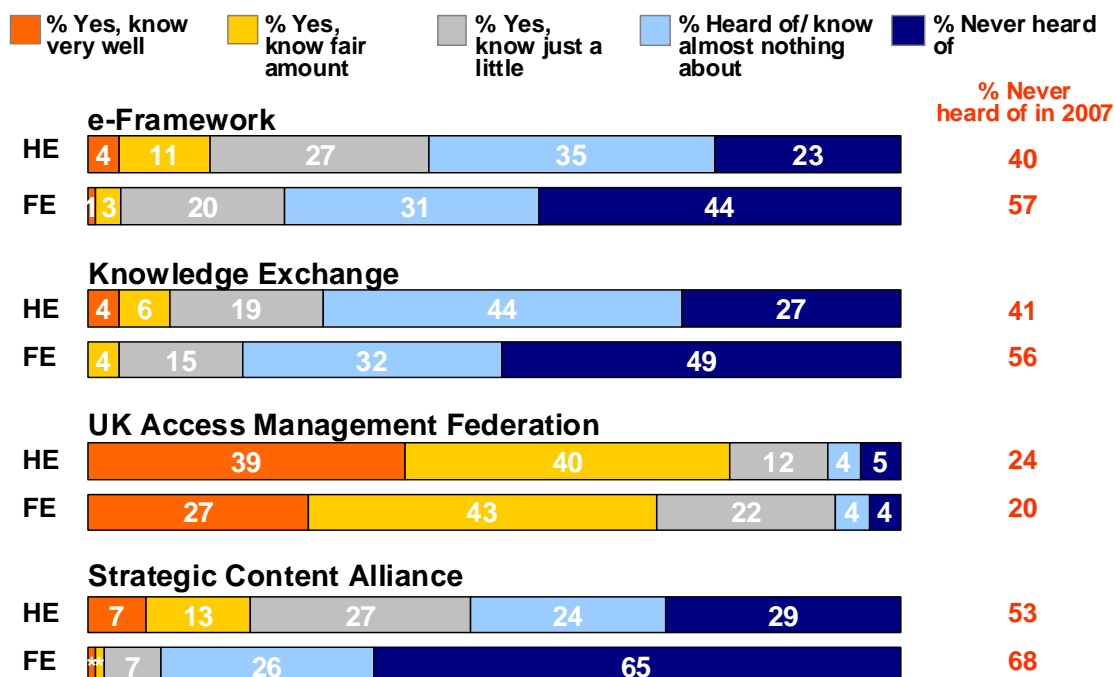


Base: all HE/FE (2008: 296 respondents, 284 institutions. 2007: 342 respondents, 292 institutions)

The charts show an increase in not only general awareness of each of the four initiatives but also in the level of knowledge about each. This is particularly pronounced with the UK Access Management Federation where the proportion claiming to know it very well has risen significantly from 7% in 2007 to 31% this year. Now, head and senior librarian and learning staff from only 4% of UK institutions claim to have never heard of it. Although general awareness is the same in FE as HE (c95%), knowledge of the Federation remains higher in HE than FE as was the case in 2007, however the difference is closing. There have also been significant increases in awareness in English and Scottish HE/FE institutions as a whole and smaller increases in Wales and Northern Ireland.

Increases in awareness for the other three initiatives are more modest, with changes occurring more at the 'know a little' or 'just heard of' level rather than increases in deeper understanding. Again, awareness is higher within HE institutions, particularly so for the SCA where 20% claim to know 'at least a fair amount' about it, compared with only around 1% of respondents from FE institutions – where 65% still remain unaware of it (reflecting a small decrease of 3% since 2007). The proportion who has ever heard of e-Framework has increased significantly from 48% to 62% (especially within FE from 43% to 56%), however, knowledge of the initiative remains low across the board.

Q Have you heard of any of the following initiatives?



Base: all HE/FE (296 respondents, 284 institutions)

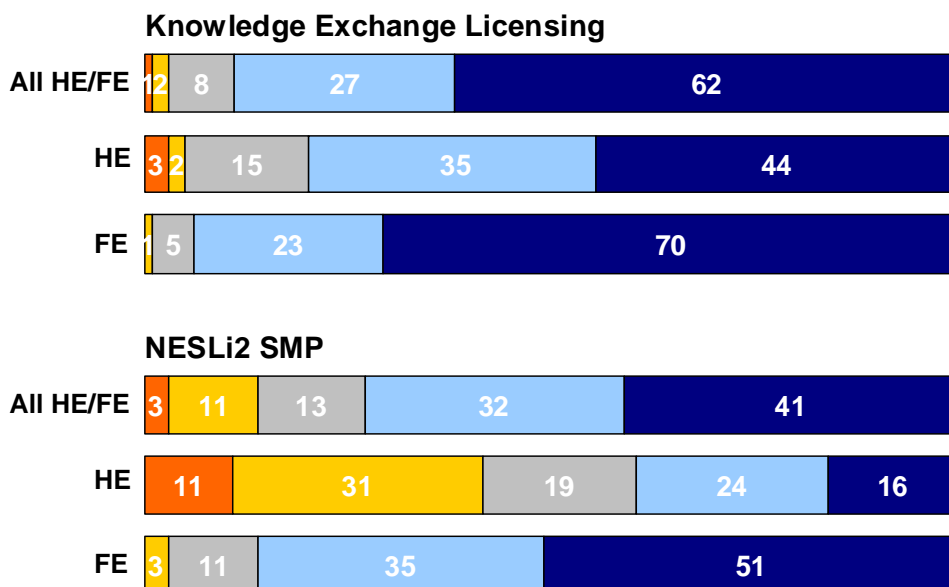
Interestingly, awareness and knowledge of e-Framework, Knowledge Exchange and SCA are significantly higher among head and senior librarian and learning staff who work in institutions where library or LRC services are integrated or shared with other services such as IT or Information Services compared with those that operate discreetly.

Questions relating to the awareness of the remaining two initiatives; Knowledge Exchange Licensing and NESLi2 SMP, were added to the 2008 survey. Head and senior librarian and learning staff from 38% of UK institutions have heard of Knowledge Exchange Licensing. Of those that have heard of it, the majority know almost nothing about it. A significantly higher proportion of respondents from FE institutions have not heard of this initiative compared with HE institutions (70% and 44%, respectively).

In contrast, awareness and knowledge of NESLi2 SMP is higher, particularly within HE where 42% claim to know a fair amount or more about it. In FE, although around half have heard of NESLi2 SMP, very few claim to know much detail about it. There were no significant differences in awareness of either initiative by level of seniority within libraries or LRCs or in how library/LRC services are structured.

Q Have you heard of any of the following initiatives?

■ % Yes, know very well
 ■ % Yes, know fair amount
 ■ % Yes, know just a little
 ■ % Heard of/ know almost nothing about
 ■ % Never heard of



Base: all HE/FE (296 respondents, 284 institutions)

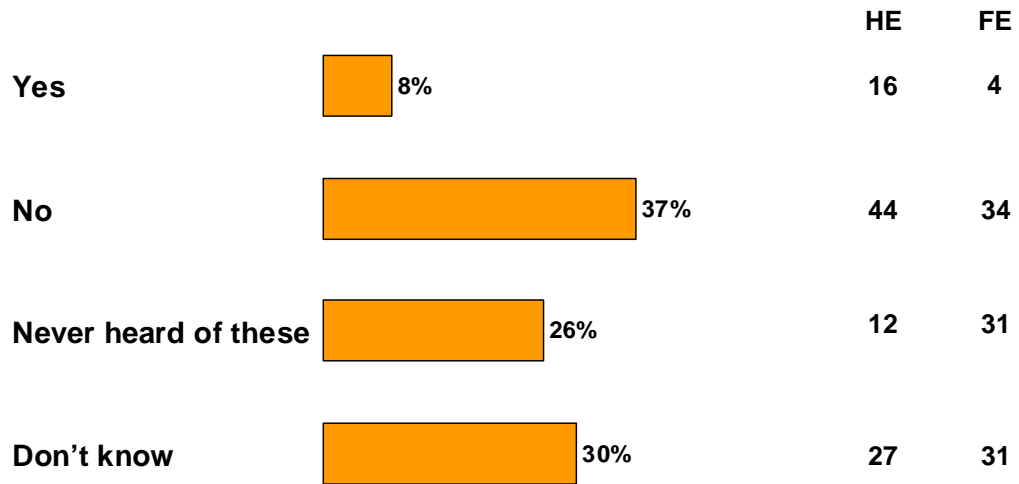
Cloud computing

Respondents were asked whether they use any web services or cloud computing facilities hosted on the internet as part of their electronic infrastructure. Cloud computing refers to computing facilities and services made available remotely and shared on the internet, which offer remote storage and computing facilities that are part of a larger and decentralized network. Currently they are offered by third party companies (e.g. Amazon Compute Cloud or Google App Engine).

Usage is currently very low. Head and senior librarian and learning staff from only 8% of UK institutions claim to have used such services or facilities (rising significantly to 16% in HE vs only 4% in FE). Around half were either unsure whether they had used any or had never heard of them.

Respondents from institutions where library/LRC services are shared or integrated with other services such as IT or Information services are significantly more likely to have used cloud computing than those from institutions where the library/LRC service operates discreetly (12% vs 5%, respectively).

Q Do you use any web services or cloud computing facilities hosted on the internet as part of your electronic infrastructure?








Base: all HE/FE (296 respondents, 284 institutions)

A range of examples of the services or facilities used were given by respondents. With the exception of Google Apps (3 mentions), all were cited by one respondent:

- BT Cloud for external suppliers or Associate members
- Live Mesh
- Externally hosted web site
- Springshare Libguides
- Syndetics opac enhancement
- GoogleMail for students
- LMS supplier's SASS interface
- Primo application
- Webmail
- Ex Libris's SFX and Metalib
- WebFeat

For those who currently do not use web services or cloud computing, almost one in ten said they would definitely consider using them, a half possibly and another one in ten are already considering it. The vast majority of the remainder were unsure.

Q *Would you consider using such services or facilities [web services or cloud computing]?*

		HE	FE
Definitely	 8%	5	9
Possibly	 49%	61	43
Already considering	 8%	18	3
No	 2%	-	3
Don't know	 33%	15	43

Base: all who are not using web services or cloud computing (110 respondents, 105 institutions)

Respondents from a significantly higher proportion of HE institutions stated that they are already considering using such facilities or services compared with FE institutions. There were no significant differences in the likelihood of using them by how libraries/LRCs are structured within institutions.

Specialist Colleges

Of the 42 Specialist Colleges (SCs) in England who were invited to participate in the survey, 6 colleges responded. All responses were from heads of libraries, learning resource centres or information services. The following chapter gives a qualitative summary of the key findings emerging from this audience.

Structure and future direction

Of the six SCs who responded, two stated their library/LRC service operates discreetly within the organisation, three are shared or integrated with other services while one has a large proportion of teaching and learning activity taking place in the LRC. Three stated the situation is unlikely to change and the others were unsure as to what the situation would be in a year's time.

The challenges facing HE and FE institutions were also cited by SCs; integrating services, information skills and literacy, managing resources and changes in learning patterns

“Trend towards personalised learning makes set resource provision (e.g. reading lists) difficult.”

SC respondent

“Being part of converged services to be effective.”

SC respondent

Four of the six SCs felt libraries/LRCs should develop non-academic services to complement their traditional role (the other two being unsure), examples given included career advice, developing information skills (e.g. safe surfing, better 'Googling', catalogue searching, reading, literacy skills) and supporting non-academic activities (e.g. social clubs) .

Content and licensing issues

Three SCs had worked collaboratively with other academic institutions; one in developing a system to store, manage or share digital content such as a VLE or digital repository, and two on other collaborative activities.

One SC has worked with a non-academic institution in jointly procuring hardware, and procuring digital collections and one on another collaborative activity.

Four of the colleges use a classification scheme or technology to support access to the library/LRC; a mixture of Dewey Decimal Classification and their own bespoke systems.

Interestingly, all six SCs stated that material created by members of their institution are systematically managed and shared electronically within their institution. A range of materials are stored and shared in this way: teaching/learning materials (4), images/multimedia (5), software (3), assessment items (3), student work (3), research papers (1), research data (1) and other materials (1). Although only a few responses were received from this sector, the relative proportions managing these materials are higher in SCs than both HE and FE institutions. Most materials are stored on Moodle or intranets.

Three SCs offer advice and support to both staff and students about how to most effectively search the web for digital content, one doesn't and the other two were unsure. Four offered support to students in searching the college's own systems.

Four SCs measure the impact electronic content is having on activities within the college; software to measure usage, offline surveys and in the case of three colleges, anecdotal information.

None of the respondents said they had responded to a JISC Consultation exercise on licensing or procuring content for the academic sector.

Digitisation issues

Only one college currently has a digitisation strategy in place and one is planning on doing so. Of these both stated they didn't have a central list or catalogue of collections digitised so far although one claimed such information could be obtained through other means.

Identifying top priority collections for future digitisation does not appear high on the agenda with only one having done so to date and one planning to do so.

JISC Collections

In terms of overall satisfaction with JISC Collections negotiating favourable agreements for the types of content required by Specialist Colleges, two were satisfied (one 'very' and one 'fairly'), one was neutral and one fairly dissatisfied.

The purpose or aim of consortia purchasing was clearly unclear to this audience with five either needing more information or being unsure.

eBooks was ranked highest as a priority area for JISC Collections to focus on for SCs, followed by secondary materials.

Awareness of the JISC Model Licence is low among this audience, with only one being aware of it and neither satisfied nor dissatisfied with its terms and conditions. The same occurred with the NESLi2 Licence.

Communication issues

With exception of e-Learning/VLEs (4) typically only a couple of respondents from SCs felt fairly informed about each of the subjects listed, suggesting this audience may not be receiving information in these areas or receiving it in a format that is not suitable or relevant.

There is some awareness that JISC is funding activity in these areas especially e-Learning and VLEs, digital repositories and digital libraries. None are aware of work in e-Research/e-Science or open standards and only two in Access Management.

Three respondents felt it was a good idea to use social networking as a means to engage students with library/LRC services, two said it depends and one was unsure. Nobody said no. For those pro the idea, social networking can facilitate engagement and communication with students in an up-to-date way, while those unsure were concerned about student protection and potential distraction unless well monitored.

Awareness and knowledge of the various JISC initiatives is low among the Specialist College audience with around half never having heard of each, and the remainder knowing only a little at best. The exception is UK Access Management Federation where two claim to know 'a fair amount'. Awareness and knowledge is lowest for Knowledge Exchange Licensing and NESLi2 SMP where four have never heard of either initiative, and two have but know almost nothing about them.

Only one SC currently uses cloud computing facilities (Oliver LMS), one has not (but would definitely consider using such services of facilities in the future), two are unsure and two have never heard of them.

Appendix

Data weighting

To ensure that the survey response was representative of the profile of HE/FE institutions within the UK as a whole, the response profile was checked against the known profile of HE and FE institutions with a primary JANET connection according to the following parameters:

- Ratio of HE:FE institutions
- Geography
- JISC Banding

For each of these three parameters, the sample profile closely matched that of the overall profile of institutions.

Sample (institution) response vs institutional profile - sector

Sector	Sample response	Response %	Institution profile ¹	Institution %	Expected Response
FE	201	71%	447	72%	206
HE	83	29%	170	28%	78
Total	284	100%	617	100%	284

¹Source: JISC Monitoring Unit

Sample (institution) response vs institutional profile – sector by country

Sector	Response HE:FE ratio	Expected HE:FE ratio ¹
England	27%:73%	26%:74%
Wales	31%:69%	37%:63%
Scotland	37%:63%	30%:70%
Northern Ireland	60%:40%	40%:60%

¹Source: JISC Monitoring Unit

Sample (institution) response vs institutional profile - country

Country	Sample response	Response%	Institution profile ¹	Institution%	Expected Response
England	234	82%	511	81%	235
Wales	13	5%	35	6%	16
Scotland	32	11%	61	10%	28
Northern Ireland	5	2%	10	3%	5
Total	284	100%	617*	100%	284

*University of London Institute in Paris has been allocated to England to provide a complete profile of all 617 HE/FE institutions receiving a primary JANET connection. ¹Source: JISC Monitoring Unit

Sample (institution) response vs institutional profile – JISC Banding

JISC Banding	Sample response	Response%	Institution profile¹	Institution%	Expected Response
A	4	1%	11	2%	5
B	8	3%	12	2%	6
C	12	4%	25	4%	12
D	19	7%	31	5%	14
E	30	11%	71	12%	33
F	40	14%	94	15%	43
G	36	13%	85	14%	39
H	44	15%	97	16%	45
I	64	23%	119	19%	55
J	27	10%	69	11%	32
Total	284	100%	614	100%	284

**3 Institutions are unclassified in terms of JISC Banding. ¹ Source: JISC Monitoring Unit*

Because multiple responses were allowed from institutions, and we are weighting in terms of institutional response, it was necessary to weight the data so that no single institution was over-represented in the response as a result of more than one individual from that institution responding.

To achieve this, the following weights shown in the tables above, were ascribed to institutions where multiple responses were received:

Table 4: Respondents per institution

Respondents per institution	FE response	HE response	FE weights	HE weights
1	197	77	1	1
2	8	10	0.5	0.5
3	-	-	-	-
4	-	4	-	0.25
Total	205	91	-	-

JISC Attitudinal Survey 2008

Head and Senior Learning and Librarian Staff

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