About you

Thank you very much for agreeing to give us your feedback on COUNTER Release 5. We have been asked to collect feedback on Release 5, and to find out how it has been to implement, whether it has achieved its aims, and what uses people are making of it. This will inform and guide COUNTER's future development.

We would be very grateful if you could coordinate a response on behalf of your organisation, or delegate it to somebody who will do that. Please note that you can save your responses part way through and continue later.

Please note that there are a couple of issues that we are not asking about here. We know that methods of dealing with consortia data have been requested, and in response an R5 harvester has recently been implemented, and COUNTER is collaborating with CC-Plus on a solution for larger consortia. Also, a separate project is currently under way looking at distributed usage logging.

1. In what country is your organisation's headquarters?

[   ]

* 2. Could you please let us know whether you are a provider or consumer of COUNTER reports?

( ) Consumer: library or library consortium

( ) Intermediary: a usage statistics service provider, either commercial or non-commercial

( ) Producer of Release 5 reports: publisher, platform provider or other content provider

Using reports

3. Does your organisation use the COUNTER reports for your own analyses?

( ) Yes

( ) No

( ) If yes, please tell us what you use these for.

[   ]

The aims of Release 5

4. One of the main aims of R5 was to address changing needs of publishers, intermediaries and libraries. On a scale of 1-5, do you agree that it succeeded in this?

- ◯ Strongly disagree
- ◯ Disagree
- ◯ Neither agree nor disagree
- ◯ Agree
- ◯ Strongly agree

5. Another aim was to bring clarity by using clear and consistent terminology on all metric types and attributes. Do you agree that it succeeded in this?

- ◯ Strongly disagree
- ◯ Disagree
- ◯ Neither agree nor disagree
- ◯ Agree
- ◯ Strongly agree

6. Do you believe Release 5 is an improvement on Release 4?

- ◯ Yes
- ◯ No
- ◯ Unsure

Your comments would be welcome

Roll-out

7. With regard to the roll-out of Release 5, the changes and the reasons for them were clear and well-explained:

- ◯ Strongly disagree
- ◯ Disagree
- ◯ Neither agree nor disagree
- ◯ Agree
- ◯ Strongly agree

8. The technical documentation was clear, adequate and timely:

- ◯ Strongly disagree
- ◯ Disagree
- ◯ Neither agree nor disagree
- ◯ Agree
- ◯ Strongly agree

9. Was the deadline for implementation realistic?

○ No, COUNTER did not allow enough time for implementation

○ Yes, COUNTER provided sufficient notice and we had could meet the deadline

○ We did not attempt to meet the deadline

Implementation

* 10. Have you successfully implemented Release 5?

○ Yes

○ Implementation is ongoing and progressing smoothly

○ Implementation is ongoing, but we are having problems

○ We don't intend to implement release 5

Implementation (continued)

11. How straightforward has this process been for you?

○ It was very complex   ○ It was fairly straightforward

○ It was quite complex   ○ It was extremely straightforward

○ It was no more complex than we expected

12. What problems, if any, did you encounter

Implementation (continued)

13. What sort of problems are you experiencing? (Please tick all that apply)

☐ We don't have the staff time to address this at present   ☐ The guidance and training is inadequate

☐ We don't have staff with the necessary technical expertise   ☐ We have encountered technical issues that have not yet been resolved

☐ We don't have the financial resources to outsource this work

☐ Other (please specify)

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Implementation (continued)

14. How straightforward was the implementation of COUNTER_SUSHI?

○ It was very complex   ○ It was fairly straightforward

○ It was quite complex   ○ It was extremely straightforward

○ It was no more complex than we expected

15. How useful have you found the validation tool?

○ We were unaware it was available   ○ Useful

○ The tool wasn't available when we implemented R5   ○ Very useful

○ Not very useful

If you did not find it useful, could you please tell us briefly why?

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16. Have the costs of implementation been what you expected?

○ Yes, they were about what we expected

○ No, they were significantly more

○ No, they were significantly less

17. Have you had any problems with the ingest of data from Publishers related to R5?

○ No

○ Yes

If "yes", please tell us about this

[text area]

Implementation (continued)

18. Could you please tell us why you don't plan to implement Release 5?

☐ We don't have the staff time to address this at present

☐ We don't have staff with the necessary technical expertise

☐ We don't have the financial resources to outsource this work

☐ The guidance and training is inadequate

☐ We encountered technical issues that we can't resolve

☐ We don't consider this a priority at present

☐ Other (please specify)

[text area]

Support materials and tools

19. Which of the following support materials have you used?

	We are aware of this	We have used this	We found this particularly helpful
Friendly Guide to COUNTER Release 5	☐	☐	☐
The Friendly Guide to Release 5 Technical Notes for Providers	☐	☐	☐
Webinars (in real time)	☐	☐	☐
Webinars (recordings)	☐	☐	☐
Newsletters	☐	☐	☐
email lists	☐	☐	☐
Foundation classes	☐	☐	☐

20. Is there any training or documentation you feel is missing? Please tell us what else you would like to see.

21. Would you say it was easy to find what you need in the support materials?

○ Strongly disagree　　　　　　　　○ Agree

○ Disagree　　　　　　　　　　　　○ Strongly agree

○ Neither agree nor disagree

22. Would you say that the support materials are clear and sufficiently comprehensive?

○ Strongly disagree　　　　　　　　○ Agree

○ Disagree　　　　　　　　　　　　○ Strongly agree

○ Neither agree nor disagree

23. Do you have any suggestions for improvement or development of the COUNTER support materials?

24. Have you found COUNTER helpful in answering questions and resolving compliance issues directly?

○ We did not contact them.

○ No, direct contact was not very helpful

○ They were helpful but slow in responding

○ Yes, they were helpful and prompt

25. Are there any amendments or improvements needed to the Code of Practice?

26. How frequently should revisions be made to the Code of Practice?

○ As often as the need arises

○ They should be rolled up into batches and spaced evenly

○ They should be left until absolutely unavoidable

27. Are there any recurrent questions you receive from customers, or other feedback that might inform the development of COUNTER or the next release? If so, could you please summarise this briefly?

28. Do your customers trust the data they receive in the reports?

29. Do you trust the audit process to assure quality, or are improvements needed?

○ The audit process ensures adequate quality for our needs

○ Improvements are needed (please tell us what).

30. What best sums up your views on Release 5?

○ It was an improvement, and we were pleased to be able to implement it

○ New releases are to be expected, and implementation is a necessary evil

○ It was unnecessary and unwelcome, and we felt pressured to be compliant

31. Do you agree that implementation of R5 offers a reasonable return on investment?

○ Strongly disagree   ○ Agree

○ Disagree   ○ Strongly agree

○ Neither agree nor disagree

Further discussion

Thanks! Do you want to talk to us some more? We would find this especially helpful to understand solutions you found to any implementation problems you encountered, and to learn about innovative uses of the COUNTER data.

32. If you are willing to discuss this further, either by email or as part of a planned focus group, please put your contact details here. (Contact details will be stored securely and used only for the purposes of this research. They will be held by the research team only, and will not be shared with COUNTER).

Name

Institution

Email Address

Phone Number