

Directors' Report 2019

COUN[✓]TER

THIS IS
WHAT WE'RE
DOING...

Directors' Report 2019

Our focus this year has been in supporting content providers to comply with Release 5 of the COUNTER Code of Practice and in helping librarians to get the most from their COUNTER REPORTS.

Members of our Executive Committee and Technical Advisory Group and other COUNTER members have collaborated throughout the year to provide this support.

These are some of their highlights:

Compliance

COUNTER audits are an independent verification that a publisher's usage reports, comply with the COUNTER Code of Practice. These audits are essential in ensuring credible and consistent usage reports which are comparability across publisher platforms. ABC is one of the approved COUNTER auditors and a member of COUNTER, and we were delighted when they authored an [online tutorial](#) to help publishers and vendors prepare for audit. This tutorial is a step-by-step guide in plain language, which will be a great help to all publishers aiming to comply with the Code of Practice for the first time.

Validation

Bernd Oberknapp from Freiburg University Library has created our [Validation Tool](#). This is freely available to the COUNTER community for testing Tabular and SUSHI format COUNTER reports. It is easy is quick and easy to use and users receive a full report on any aspect of a report which fails, so that it can be corrected. As well as providing libraries with confidence that the reports they receive comply to the Code of Practice, the tool should help publishers and vendors reduce the cost by using the tool as part of their workflow when preparing for COUNTER audit.

Journal Reports

Irene Barbers from Forschungszentrum Juelich provided an excellent breakout session '[Using Release 5 Usage Reports for strategic decision making](#)' at the UKSG 2019 conference, not once but twice! On both occasions the room was packed as Irene explained how the new Release 5 journal reports work and how to compare them with Release 4 journal reports. You can view Irene's [slides](#).

Lorraine Estelle and Elena Zapryanova-Hadjinikolova from Elsevier delivered a Library Connect Webinar on Release 5 reports. You can [view the presentation on demand](#) at your convenience.

You can view the presentation on demand at your convenience at <https://tinyurl.com/rmorh9w>

Connecting the dots ...

COUNTER and JSTOR

It is always helpful to have the usage reports explained in the context of a familiar platform. We were there for delighted when Peter Vlahakis, Senior Product Manager volunteered to lead an instructional [webinar](#) about the COUNTER Code of Practice Release 5. We are delighted to say, that Peter is now also a member of the COUNTER Technical Advisory Group.

[You can view Peter's presentation at your convenience.](#)

Open Access and COUNTER

Lorraine Estelle, the COUNTER Project Director was delighted to be invited to Luxembourg by ICOLC to talk about how Release 5 supports a deeper understanding of the usage of open access content. Here presentation is available, and you might also find our COUNTER Foundation Class on the same subject of interest.

Book Reports

Book reports are perhaps the area of greatest change in Release 5. 200 of you registered for our webinar on this subject and you can. You can view the [presentation](#) on demand at your convenience. You may also find useful our [COUNTER Foundation Class](#) on Book Reports.

Translations

COUNTER is an international standard and we are grateful to the members who our English language guides and tutorials.

Huge thanks are due to Magaly Bascones for the Spanish language edition of our Friendly Guide for Librarians: [Guía amistosa de la versión 5 para bibliotecarios.](#)

Thanks also to Thomas Porquet and his colleagues at the [Couperin.org](#) and <http://www.inist.fr/>, who translated our [Foundation Classes](#) into French and also the [Code of Practice 5.01.](#)

The 'voice' of COUNTER

Our Foundation Classes have proved extremely popular, with all the videos on our [Playlist](#) getting many views. Our thanks go to Tasha Mellins-Cohen who is the voice of the COUNTER on these videos.

Expert Panel

Our Expert Panel at Charleston was chaired by David Sommer, who is chair of our Executive Committee.

Athena Hoepfner from University of Central Florida gave an overview of book reports and metrics and Sonja Lendi from Elsevier explained how to get the best from journal reports.

[You can view their presentations.](#)

Kornelia Junge the Senior Research Manager at Wiley provided a clear step by step guide to using Microsoft Excel with COUNTER Release 5 reports. Kornelia gave a live presentation, but you can view the [COUNTER Foundation Class](#) she created which explains how to use Excel to filter reports, create a pivot table and total the usage metrics.

YOUR FEEDBACK
AND WHAT
WE ARE GOING
TO DO WITH IT...

Our consultation with members

Every year we consult with our members and your feedback informs our operational plan for the coming year. This year our survey was open between 17 June and 29 July and 78 of you responded.

We received some lovely feedback, for example 'The support is fantastic!' and 'The friendly guides and videos to COUNTER have been so helpful. THANK YOU!!!!'

However, respondents to the survey made some requests and raised some areas of concern and we will work to address them.

Here are some of your comments and our planned actions,

“

'Examples and consistency. I understand you are rolling out specifications and documentation and validation tools all at once and it appears nothing is stable or locked down and that is hard and difficult for us but is how this appears to be accepted, however, when there are discrepancies between new tools and documentation and everything says "under development". You do not know what to trust and that is an extreme tax on our developers.' Better change version control for the code of practice. It's hard to see where and when changes have been made to the COP.'

”

Our response:

As a small organisation we reliant on volunteer help we struggled to produce all the materials and tools at the same time and in synchronisation. However, this point is well noted and in 2020 we will make available a 5.0.2 version of the Code of Practice. However, we will only publish this when all the supporting materials and tools are aligned. 5.0.2 will have a detailed Change Log so it will be clear where clarifications and amendments have been made to the Code of Practice

“

'We need a consortial solution for Release 5. Many of our libraries rely on us to provide their usage statistics, as they do not have the capacity themselves.'

”

Our response:

Progress on our development of consortia tools has been much slower than we hoped, However, work continues and we are delighted to be collaborating and sharing code with [CC-PLUS](#) which is producing complementary tools for consortia.

“

'I think C5 is too complicated. All I really want is total downloads by title, and searches by platform. That's it. The rest is overcomplication that I don't need'

”

Our response:

Quite a few members made similar comments. Release 5 in fact already provides this simplified overview through the Platform Reports. All publishers and vendors are required to provide these reports which provide a high-level summary of activity on a platform. We will do more to promote the utility of these reports and a webinar is planned for 19 March 2020.

Members

Members make COUNTER possible.
We have support from 255 member organisations from across the world.

Welcoming 9 new members

[New Day Films](#)

[HSLC](#)

[East View](#)

[Madigan Library](#)

[University of Edinburgh](#)

[Bloomsbury](#)

[Dawson Books Limited](#)

[eLibro.net](#)

[NASA](#)

Counter members by category

LIBRARIES

40%

LIBRARY CONSORTIA

20%

LARGE PUBLISHERS

18%

SMALLER PUBLISHERS

13%

INDUSTRY ORGANISATIONS

5%

MEDIUM PUBLISHERS

4%

All of COUNTER Foundation

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Elena Zapryanova-Hadjinikolova

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Paul Needham, Cranfield University Chair,

Senol Akay, American Chemical Society

Melissa Belvadi, University of Prince Edward Island

Andrew Goldthorpe, ABC

Ian Hayes, Atypon

Athena Hoepfner, University of Central Florida

Kornelia Junge, Wiley

Bernd Oberknapp, Freiburg University Library

David S. Perry, New York University

Oliver Pesch, EBSCO

Thomas Porquet, Couperin.org

Peter Vlahakis, Ithaka/JSTOR

Elena Zapryanova-Hadjinikolova, Elsevier

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OUR FINANCIAL REPORT...

Statement of Income and Retained Earnings year ended 31st December 2019

	2019	2018
	£	£
Turnover	125,079	124,249
Gross profit	125,079	124,249
Administrative expenses	(90,835)	(123,696)
Other operating income		17,000
Operating profit	34,244	17,553
Surplus before taxation	34,244	17,553
Tax on profit	-	-
Surplus for the financial year and total comprehensive income	34,244	17,553
Retained earnings at the start of the year	119,723	102,170
Retained earnings at the end of the year	153,967	119,723

All the activities of the company are from continuing operations.

Statement of Financial Position 31st December 2019

	2019		2018
	£	£	£
Current assets			
Cash at bank and in hand 196,627	219,349		
Creditors: amounts falling due within one year (Note *)	65,382		76,904
Net current assets		153,967	119,723
Total assets less current liabilities		153,967	119,723
Capital and reserves Profit and loss account		153,967	119,723
Members funds		153,967	119,723

*. Creditors: amounts falling due within one-year

2019 2018

£ £

Trade creditors

65,382 76,904

These financial statements have been prepared in accordance with the provisions applicable to companies subject to the small companies' regime and in accordance with Section 1A of FRS 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland'. For the year ending 31st December 2019 the company was entitled to exemption from audit under section 477 of the Companies Act 2006 relating to small companies.

Directors' responsibilities:

- The members have not required the company to obtain an audit of its financial statements for the year in question in accordance with section 476
- The directors acknowledge their responsibilities for complying with the requirements of the Act with respect to accounting records and the preparation of financial statements.

These financial statements were approved by the board of directors and authorised for issue on 27th February 2020.

