COUNTER Release 5 research study: Call for proposals

Background
Release 5 of the COUNTER Code of Practice became effective from January 2019. Now, libraries have twelve months of Release 5 usage data from an array of content providers. Therefore, COUNTER would like to commission research to evaluate Release 5.

The aims of Release 5 were:
Consistency: Addressing changing needs and reducing the complexity of the Code of Practice to ensure publishers and content providers are able to achieve compliance.
Simplicity: Four Master Reports streamlined for the most common reporting needs for librarians, publishers and content providers.
Flexibility: Comprehensive reporting attributes empower users to generate necessary drill-down reports with ease.
Clarity: Using clear and consistent terminology on all metric types and attributes brings clarity.

Purpose of the Research
The purpose of the research outputs is to:

- Inform the COUNTER Executive and Technical Advisory Group by answering the following questions: What is working well for producers and consumers of the usage reports? Are there any issues or problems? Which metrics are used, and which if any of the metrics are not being used? Which Standard Views are being used, and which if any are not being used? Are there any amendments or improvements needed to the Code of Practice?
- Inform the COUNTER Project Director if producers and consumers of the usage data need any training or guidance.
- Inform the COUNTER community about how librarians and library consortia are using COUNTER reports to answer common use cases. The research outputs may also showcase any innovative use of the usage statistics.

Required outputs
A practical report(s), which will be made available through a cc-by licence for use by the COUNTER Executive, COUNTER Technical Advisory Group and the wider COUNTER community.
Governance
The COUNTER Executive Committee will have oversight of this project and receive the interim and final report(s).

Funding
This funding may be awarded to one large study or multiple smaller studies. A total of £25,000 is available. Payment will be in stages at agreed milestones.

Large studies will focus on all of the following three groups. Smaller studies may focus on one or two of these groups:

- Producers of Release 5 reports: publishers, platform providers and other content providers.
- Consumers of Release 5 reports: libraries and library consortia.
- Intermediary usage statistics service providers, both commercial and non-commercial.

Timeline
Submit proposals by 30 April 2020
COUNTER will inform successful bidders by 15 May 2020
Interim Report by 30 August 2020
Final Report by 7 October 2020

Approach and areas of enquiry
- The study may use research methods such as desk research, expert interviews, and professional facilitation to enable experts from the publishers, vendors, intermediaries, academic libraries and library consortia to share their expertise and experience for the purpose of the project.

- Whatever methods are used you will need to account for, and where possible draw from different types/size of publishers, vendors, intermediaries, academic libraries and library consortia (ideally in different countries and/or regions).

- The areas of investigations should include usage of journals, books, databases and if possible, multimedia.

Approach, tasks and methods
Bidders are asked to provide an overview of the main approach and tasks you propose for the study. Please indicate the main methods you will use. Please identify any additional tasks which could be relevant for the objectives of the study. Please also identify how you will manage confidentiality and privacy.

Timeline
Please describe a project timeline following the specifications above, including milestones and deliverables.
Staff / people involved
Provide an overview of the people involved in the study and their skills and relevant experience and ability to undertake the work described above. Please give examples of relevant work you have conducted.

Costs
Please detail all the costs involved including staff time and travel (if applicable).

Conflicts of interest
Please state any potential conflict of interests of which COUNTER should be aware.

Other comments
Please state any other comments (if applicable).

Submission of proposals:
Please limit proposals to a maximum of five pages. Submit by email to Compliance@counterusage.org by 30 April 2020 23:00 BST