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Planning Tool for Developing a Digital Library of Monitoring and Evaluation Resources



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Planning Tool for Developing a Digital Library of Monitoring and Evaluation Resources



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Purpose of the *Planning Tool*

There are different ways to approach the development of an electronic or digital library of HIV Monitoring and Evaluation (M&E) resources. A quick assessment among potential library developers pointed to the need for a document that lays out all the factors that need to be considered without being prescriptive in terms of the methodology to use. Thus, this *Planning Tool* provides a checklist of tasks to be conducted and issues to be addressed prior to and during the development of a digital library. The *Planning Tool* is not intended to be a detailed step-by-step implementation guide. Its purpose is to help assure that users of a M&E digital library can successfully locate resources and can make informed decisions regarding the quality of the materials.

The purpose of the *Planning Tool* is:

1. To provide guidance for current owners and future developers of a M&E digital library on the range of issues to be addressed in usability and user-friendliness of the library.
2. To provide a list of questions to help organisations brainstorm if they can and should invest their resources in developing a digital library.

Content of the *Planning Tool*

The *Planning Tool* is organized as a checklist of tasks to be conducted and issues to be addressed prior to and during the development of an M&E digital library. Each section starts by defining some of the key terminology used in that section. Note that the terms "resources", "content" and "holdings" are used interchangeably in this document.

The following sections are covered:

Section 1: Target audiences: Profile and Information Needs

This section covers the importance of and the process for defining the target audience(s) for the library.

Section 2: Collaboration

This section covers the needs for and mechanisms of collaboration for acquiring the holdings; obtaining permission for including specific holdings; and, developing and applying the criteria for content inclusion.

Section 3: Quality/ Usability of the Digital Library

This section covers issues related to the usability of the library including different components of usability, functionality issues, interface, issue to consider in the user experience, and some standard policies that govern the use of a digital library.

Section 4: Quality of the Holdings in the Digital Library

In this section, quality related to the materials contained in the digital library is explored and the specific inclusion criteria for library holdings.

Section 5: Maintenance of the Digital Library

This section covers issues related to long term up-keep of the digital library.

Section 6: Rights to Distribution and Modifications

This section covers the issues regarding permissions, copyrights, and other legal implications of providing materials in the library.

Section 7: Access and Security

This section covers the issues to be addressed when determining who will access the library, how they will access it, and what security needs to be considered to safe-guard the library.

Section 8: Cost Implications

This section covers the key factors affecting the cost of developing and maintaining a digital library.

The *Planning Tool* does not cover:

- with whom to collaborate
- how to manage the library
- which software to use or the technical specifications or procedures for software programming, the meta-data structure, maintaining a web-based application, converting non-digital media to digital media. There are many options and several sources covering these issues are already available.

Intended users of the *Planning Tool*

The primary target audience are organisations which are considering development of a digital library of M&E resources which they intend to make publicly available (in any format such as CD, DVD, memory drives, on-line).

A secondary target audience are organisations which are collating and disseminating M&E related resources on the web either in view and/or download format. Even if these are not intended as a 'library' as such, issues considered in this Planning Tool may help to identify, select, and organise these resources better.

Although it does not target those who want to compile and organise M&E resources for internal use, this Planning Tool may still be helpful.

1. Target Audience: Profile and Information Needs

Is the target audience for the library limited? If it is limited, what is the profile of the audience? These questions must be answered first because they affect all other decisions regarding the library. The intended target audience should not be confused with those who may have access to the library, i.e., the library may be accessible to a broad range of people. If access is not restricted, then the target audience should be explained on the introductory page of the library so it is clear who the library was specifically developed for. There may also be more than one target audience for different sections of the library. For example, a section on "M&E methods" may be most suitable for M&E practitioners while a section on "results of evaluations" may be of use to a much wider audience including programme managers.

Determining the information needs and information-seeking behaviour (relative to the subject of M&E) of the target audience is as important as determining the audience profile. This section addresses both.

Terminology

Information needs: This is best defined by answering a series of questions: Does the user need information? Does the user know she/he needs information? What types/content of M&E-related information is needed? What format of the information is needed?¹

Information-seeking behaviour: This is best defined by answering a series of questions: Does the user do anything about her/his information needs? How does she/he select resources? How does she/he perform a search?²

Library Holdings: The resources or content contained in the library. While these are predominantly written documents, they may also include video, audio recordings, images etc.

Profile: The significant features of an entity (individuals, groups); the extent to which the entity exhibits traits or abilities.³

1.1 The profile of the target audience

- The different target audiences have been identified and indicated as primary or secondary.
- Whether the target audience is expected to change as the library expands, has been determined.

1 Adapted from: Taylor R. The process of asking questions. *American Documentation* 1962; 391-396; Wilson T. The investigation of information use and users' needs as a basis for training programmes. *International Forum on Information and Documentation* 1997; 2:25-29.

2 Wilson T. The investigation of information use and users' needs as a basis for training programmes. *International Forum on Information and Documentation* 1997; 2:25-29.

3 Adapted from Merriam-Webster Dictionary; <http://www.merriam-webster.com/dictionary>

- The profile of the target audience has been determined, including:
 - » The level and type of prior experience of the target audience with performing searches on-line and/or in digital libraries.
 - » The level and type of education of the target audience.
 - » The professions and positions held by the target audience.
 - » The target audience's relationship with M&E.
 - » The average and range of bandwidth speeds used by or available to the target audience.
 - » The average and range of computer specifications used by the target audience (Computer Processing Unit/CPU, storage, video, etc).
 - » Whether the target audience has continuous or limited access to the library.
 - » From where the target audience accesses the library.
 - » The proportion of the target audience who will ask someone else to search the library for them; who they ask to do search for them and what their profile is.
 - » Whether the target audience has any disabilities, what disabilities and the proportion of the target audience with these disabilities.
 - » The proportion of the target audience with access to a printer.

1.2 The target audience's information needs & information-seeking behaviour

- The target audience's information needs have been determined.
- Whether the target audience can already satisfy its M&E information needs with existing libraries has been determined.
- When the target audience needs to have access to the library has been determined.
- The target audience's perceptions about the usefulness / usability of digital libraries have been determined and are favourable.
- The target audience's ability to articulate its M&E needs has been determined and is favourable.
- Whether the target audience's information needs are expected to change over time has been determined.
- The functional categories within which the target audience likes to browse the library holdings have been determined.
- How the target audience prefers to view the results of searches has been determined.

2. Collaboration

All digital libraries involve some level of collaboration within the organisation intending to develop it, but most libraries also require collaboration from outside the organisation. This section covers the needs for and mechanisms of collaboration for (a) acquiring the holdings; (b) obtaining permission for including specific holdings; and, (c) developing and applying the criteria for content inclusion.

Collaboration is critical because the use and maintenance of the library depends on multiple stakeholders. This is especially true of libraries which focus on the acquisition and dissemination of unpublished (i.e., grey) literature. With this aspect also come the “grey” areas of intellectual property rights and the approvals for publicly disseminating resources.

This section does not address collaboration for designing the library interface or its organisational structure; configuring the library database; or for adding new materials and maintaining the library.

Terminology

Collaboration: To work jointly with others, especially in an intellectual endeavour or to cooperate with an agency with which one is not directly connected.⁴

2.1 Collaboration issues

- The organisations and/or individuals with whom collaboration is required, have been identified.
- The organisations and/or individuals’ needs for collaboration have been identified.
- The human and financial resources required for collaboration have been secured.
- The mechanisms for collaboration have been identified and adopted.
- The political ramifications of collaboration with various organisations and/or individuals have been identified.
- The expectations, roles and authorities of the organisations and/or people within the collaborative effort have been agreed and documented.
- The Terms of Reference for all groups within the collaborative effort have been developed and adopted.

3. The Quality/Usability of the Digital Library

The library software, platform, structure, organisation and visual presentation all impact the user's satisfaction with the library when navigating, searching and viewing the library holdings. The quality of the library interface and the experience users have are similar to those of a website interface. In website design and evaluation, "usability" is the primary component of "quality" so we adopt this nomenclature here.

Some of the concepts explored include: What are the functionality issues? What are the different components of library usability? What should be considered in the interface? What should be considered in the user experience? What are some standard policies that govern the use of a digital library?

Terminology

Beta test: A beta version is the first version released outside the organisation which developed the library for the purpose of testing it in the 'real world'. A beta test is a pilot of the beta version mostly focused on diagnosing bugs and problems with the functionality of the digital library. However, in case there is a multi-stakeholder collaboration, the beta-test may also provide an opportunity for obtaining wider buy-in at an early stage.

Library interface: The method of accessing the library (e.g., flash interface, web page interface, software application interface)

Meta-data: Data about data. In the context of a digital library, it is the information taken from the material (such as date, author name, publisher, type of document, abstract, ISBN number) which is then entered as a unique field in the library database. It is used for sorting, indexing, and other database functions not publicly visible.

Platform: The operating system, the software used, and any other hardware or software specifications related to running the digital library.

Tag: A keyword or term assigned to a library holding which helps to describe it and which allows it to be found by browsing or searching.

Usability: The effectiveness, efficiency, and satisfaction with which users can achieve tasks in the particular environment of a product. High usability means that the system is easy to learn and remember; efficient; visually pleasing and fun to use; and, quick to recover from any errors.⁵

3.1 Functionality

Functionality is determined by how users will find library holdings. For example, browsing content, using meta-data, using filters, or using free text search. Any combination of these functionalities or perhaps all of them may be implemented depending on the needs of the target audience.

- The industry standards for functionality of digital libraries are known.
- The common functionalities of the digital library have been identified.
- The types of functionality to enhance usability of the library have been identified.
- The different types of searches needed, including advanced search capabilities, have been determined.
- How the library will be indexed and the process for implementation have been determined.
- What meta-data will be used and how they will be configured, have been determined.
- If and what tags will be used, have been determined.
- The categories for grouping and browsing the holdings have been determined.
- How the holdings will be filtered has been determined.
- How the holdings will be sorted has been determined.
- The software for the library has been identified.
- Whether multiple languages will be supported has been determined.
- Whether the library will support translation has been determined.
- Whether the library will be able to extract information inside the holdings has been determined.
- The human and financial resources required to conduct beta testing have been secured.

3.2 Searching

Searching is a critical component of any digital library. It is one of the primary ways that users will find specific holdings. There should be multiple levels of searches including simple and advanced options.

- The different types of searches available in the library have been determined.
- The types of search functions available in the library have been determined.
- The appropriate search engine has been determined (even if it is already part of the software, its capabilities should be assessed to ensure they are adequate).
- Whether searches can be performed in an incremental manner (i.e., building on previous search results) has been determined

3.3 Languages

- The languages the library will support have been determined.
- The human and financial resources required for multi-language support have been secured
- Whether the software supports multiple languages or has an appropriate add-on or parallel mechanism has been identified.
- The quality of the translations has been assured.
- A mechanism for obtaining permission to reproduce content in other languages has been identified.

3.4 Site usability (user friendliness)

- Factors influencing general usability are known.
- Factors influencing the usability of the selected software are known.
- A protocol to test and measure the usability of the library has been developed.
- The timing and duration of testing the usability has been determined.
- The human and financial resources required to assure good usability have been secured.
- A plan for implementing improvements in case of sub-optimal usability has been determined.

3.5 Selection of file format for content

- The format(s) of the library holdings has/have been determined.
- The limitations of the selected format are known and have been considered with regards to:
 - » entering
 - » searching
 - » downloading
 - » printing
- The features specific to the selected file format are known.
- The formats supported by the library software are known.
- The security implications related to the selected format are known.
- The upgradeability of the selected format has been considered.

4. Quality of the Holdings in the Digital Library

In this section, we explore quality related to the materials contained in the digital library and the specific inclusion criteria for library holdings as they may address some elements of quality.

There is no universally accepted definition of “quality” of library holdings as the concept of quality may vary with the type of material considered as well as with the perspective of different reviewers. For example, the quality of an article in a scientific journal is judged differently than a implementation manual. The quality of an audio recording is judged differently than a brochure. This makes it difficult to identify and adopt measures of quality, especially for grey literature. Nonetheless, the issue of content quality needs to be addressed as it impacts the usability and satisfaction with the library.

For the purpose of an M&E digital library which contains predominantly grey literature, the following categories of quality may be useful:

3. Criteria for inclusion (i.e., minimum requirements for inclusion)
4. Readability of the material
5. Technical soundness of the material

The criteria for inclusion may already include elements of both readability and technical soundness and materials which do not satisfy the inclusion criteria are thus excluded from the library. Rather than excluding materials, it may also be considered to clearly label materials according to readability and/or technical soundness or to establish a scoring system for quality to categorize the holdings.

If factors of quality are introduced, the complexity of the review process, feed-back and notification to content providers, as well as the resources needed to implement the procedures need to be carefully considered. One may be tempted to keep the inclusion criteria to a very minimum so that “everything is accepted” and minimal resources are needed to maintain the library but this may have its own drawbacks. Holdings may become too large and too broad resulting in user dissatisfaction. On the other hand, one does not want to make the inclusion criteria so strict that most materials are excluded. The challenge is to introduce some measures of quality control without excluding useful resources and without over-complicating the quality assurance process.

Terminology

Library Holdings: the resources contained in the library. While these are likely to be predominantly “documents”, they may also include video, audio recordings, images, brochures, etc.

Grey Literature: 1) Information produced at all levels of government, academia, businesses and industry in electronic and print formats which are not controlled by commercial publishing⁶. 2) Foreign or domestic open source materials that are usually available through specialized channels and may not enter the usual channels or systems of publication, distribution, bibliographic control, or acquisition by booksellers or subscription agents⁷.

Criteria for inclusion: A standard, rule, or test on which a judgment or decision is based as to include a certain material in the library or not. These may be a combination of several factors involving subject matter, type of material, and quality of material. This may be a simple, subject-specific limitation such as collecting only resources related to HIV and AIDS, or a combination of different restrictions rendering the implementation procedure more complex and more resource intensive.

Readability: Text readability is a measure of how well and how easily a text conveys its intended meaning to a reader. A number of factors influence the readability of a text including: physical factors (such as typeface, font size, spacing and layout); reader factors (such as prior knowledge, reading ability, and motivation); vocabulary, text structure, text coherence and syntax⁸. Document readability expands upon this by considering tables, graphs and images within the document as well as if the organisation/layout which facilitates browsing and electronic/visual searches. This is usually determined by looking for a good document outline, table of contents, headings and subheadings, indexes, glossaries, etc.

Technical soundness: This is usually associated with peer review of materials such as project proposals, evaluation protocols and technical reports. The factors influencing technical soundness vary by subject and area of expertise.

Peer Review: Scientific review of a technical resource by individuals who are qualified to do so in terms of their status in the relevant discipline or a closely related field of science, in order to judge the relevance and worthiness of the technical resource based on a set of standards.⁹

⁶ Greynet: <http://www.greynet.org> (Luxembourg, 1997 - Expanded in New York, 2004); accessed 12 September 2008.

⁷ The U.S. Interagency Grey Literature Working Group; accessed 12 September 2008.

⁸ <http://www.readability.biz/index.html>; accessed 12 September 2008.

⁹ Adapted from <http://www.escop.msstate.edu/committee/peerrev.htm>; accessed 12 September 2008.

4.1 Criteria for inclusion

The criteria for inclusion at the simplest level would not include elements of readability and technical soundness, such as requirements to have a document title, an author, a date, and not being in “draft” status. At a more complex level, the inclusion criteria may already include some elements of readability or technical soundness in which case there is overlap between the different sets of criteria.

- A method for establishing the criteria for inclusion for each different type of material (technical report, brochure, video, etc) has been adopted.
- The profile of the individuals involved in determining and testing the criteria for inclusion has been determined.
- The organizations and individuals involved in determining and testing the criteria for inclusion have been identified.
- Criteria for inclusion have been adopted, including:
 - » All operational definitions to implement the criteria for inclusion (e.g., material must be “M&E-related” to be included);
 - » If only “final” versions of documents are permitted, a method for identifying drafts from final documents;
 - » Ramifications of excluding documents based on adopted criteria for inclusion (such as impact on content acquisition, political and budget implications);
 - » Tools (such as checklists) for assisting with review and documenting results have been developed and tested;
 - » Whether or not the library reviewers are permitted to make changes to the material to satisfy criteria for inclusion.
- A mechanism (process and tools) for reviewing material for inclusion has been adopted.
- The process and tools used to reviewing material for inclusion has been tested for validity and reliability.
- Human and financial resources for determining inclusion of holdings have been secured.
- A mechanisms and template for notifying content providers if their material was included in the library has been adopted.
- The training package required for applying the criteria for inclusion has been developed.
- How to apply the criteria for inclusion to material in multiple languages has been determined.

4.2 Readability of the holdings

- The elements of document readability to be considered in the document review have been determined for each type of resource.
- The tests to be used for readability have been identified.
- The technologies which can be used to review readability have been identified.
- The organisations and individuals involved in assessing readability (if not fully automated) have been identified and have agreed to conduct the reviews.
- The process for conducting readability assessments and documenting the results has been determined.
- The process and tools for notifying content providers of the results of the readability assessment have been developed.
- The human and financial resources for conducting readability reviews have been secured.
- Whether the file format affects the ability to search a document and to what degree have been determined.
- Whether the library reviewers are permitted to make changes to the material to satisfy criteria for inclusion has been determined (e.g. if a certain font reduces readability, can the font be changed?).
- How to handle material submitted in multiple languages has been determined.
- The ramifications of excluding or labelling materials according to readability requirements have been determined.

4.3 Technical soundness of the holdings

- The elements of technical soundness to be included in the review have been determined for each type of resource.
- Whether a peer review by pre-selected reviewers is used or a review by library users has been determined.
- The organisations and individuals involved in peer review have been identified and have agreed to conduct the reviews.
- The profiles of the peer reviewers for different subject matter have been identified.
- The process and tools for conducting technical soundness reviews and documenting the results have been determined.
- The process and tools for notifying content providers of the results of the technical soundness assessment have been developed.
- The human and financial resources for conducting technical soundness reviews have been secured.
- The ramifications of excluding or labelling materials according to technical soundness have been determined.

5. Maintenance of the Digital Library

Once a digital library has been created, it is important to have procedures in place to ensure the library is adequately maintained. This includes piloting of the library to ensure it meets the users' needs; ensuring that the underlying system running the library remains in good working condition; conducting routine reviews of the system; and, conducting routine reviews of the library holdings.

Terminology

Meta-data: Data about data. In the context of a digital library, it is the information taken from the material (such as date, author name, publisher, type of document, abstract, ISBN number) which is then entered as a unique field in the library database. It is used for sorting, indexing, and other database functions not publicly visible.

5.1 Content acquisition

- Whether passive and/or active solicitation for new content will be used has been determined.
- The organisations and individuals involved in soliciting new content have been identified and have agreed to assist.
- The organisations and individuals involved in providing materials (i.e., the content providers) have been identified and have agreed to assist.
- The process and tools for acquiring new content have been adopted.
- The process and tools for notifying content providers when their materials are received, have been developed.
- The human and financial resources for acquiring new content have been secured.
- A process for identifying and excluding any duplicate materials has been developed.

5.2 Adding and updating holdings and meta-data

- Whether or not hardcopies of materials will be digitized has been decided.
- The technical means to digitize materials and convert file formats to the required format have been secured.
- The human and financial resources to digitize materials or convert file formats have been secured.
- The human and financial resources for review of materials, adding required meta-data to the materials, and entering the materials in the library have been secured.
- Whether the library will archive outdated materials or keep them in the library has been determined.

5.3 Other issues related to maintaining the library

- How feed-back from library users will be obtained and used has been determined.
- How often the library will be upgraded has been determined.
- The human and financial resources required to upgrade the library have been secured.

5.4 Beta testing / piloting with multi-stakeholder participation

- The organisations and individuals involved in the beta test have been identified.
- The approach for implementing the beta test and its duration have been determined.
- The mechanism for obtaining feed-back from the beta test and for responding has been determined.
- The approach to analyzing the feed-back from the beta test and incorporating library revisions has been determined.
- The human and financial resources required for the beta test have been secured.

6. Rights to Distribution and Modifications

When providing digital copies of materials, it is important to be aware of the legal implications regarding copyrights. This section will help in identifying the types of issues related to intellectual property rights that may be encountered.

Terminology

Intellectual property rights: Intellectual property refers to creations of the mind: inventions, literary and artistic works, and symbols, names, images, and designs used in commerce. Intellectual property is divided into two categories: (1) industrial property which includes inventions (patents), trademarks, industrial designs, and geographic indications of source; and, (2) copyright which includes literary and artistic works such as novels, poems and plays, films, musical works, artistic works such as drawings, paintings, photographs and sculptures, and architectural designs. Rights related to **copyright** include those of performing artists in their performances, producers of phonograms in their recordings, and those of broadcasters in their radio and television programs¹⁰.

Distribution: in the context of a digital library, distribution means including the full-text material or portions of the material in the library holdings for viewing and/or downloading.

6.1 Issues related to intellectual property rights

- The different restrictions for each type of material have been identified.
- A risk assessment of the legal implication of distributing materials in violation of intellectual property rights has been conducted.
- The political implications of distributing materials without approvals - even if not in violation of any intellectual property rights, have been assessed.
- A process for identifying the types of permission required has been established.
- The different types of permission required have been identified.
- A process for obtaining each type of permission has been established.
- The required forms for documenting permissions have been obtained.

7. Access and Security

This section discusses considerations about different types of access to a digital library. The issues here will also help to address access for people with disabilities, access related to bandwidth, defining individual roles for access, and security.

7.1 Access

- The systems on which the library is intended to work, have been identified (i.e., operating systems, memory configurations, video resolution, Computer Processing Unit/ CPU, etc)
- Whether the library requires the purchase of additional plug-ins has been determined.
- The browsers with which the library (if on-line) is intended to work have been determined.
- Whether the average user has sufficient bandwidth to access the library (if on-line) has been determined.
- The factors affecting accessibility have been identified.
- The usability needs of the target audience have been identified.
- Whether access for people with disabilities is needed, has been determined and if so, how they affect usability has been identified.
- The human and financial resources required to build and maintain accessibility have been secured.
- Whether 508 compliance is required, has been determined.
- The bandwidth necessary to support the accessibility features of the library (if on-line) has been secured.
- The effect of plug-ins and third party solutions on accessibility features has been identified.
- The effect of industry standard applications versus custom solutions on accessibility features has been identified.

7.2 Roles

- The organisations and individuals responsible for acquiring and/or adding content have been identified and their Terms of Reference have been developed.
- The organisations and individuals responsible for developing and/or configuring the library software have been identified and their Terms of Reference have been developed.
- The roles and permissions for different levels of access to the library have been determined.
- Whether user registration is a requirement for access has been determined.

7.3 Security

- Whether the library is available on-line to the general public or restricted to an intranet has been determined.
- Whether library access is restricted by password has been determined and if so, the technology for password protection is available.
- The level of security threat protection (i.e., firewall, antivirus, anti-spam, spyware, etc) has been determined
- The human and financial resources necessary to maintain security have been secured.
- A back-up plan and equipment in case of a security breach are in place.
- Whether there is an administrative back-end to control who is allowed to make modifications has been determined.

8. Cost Implications

The cost of implementing a digital library includes:

- The initial purchase price and recurring cost of software licensing.
- The cost of upgrading to new versions of the software.
- The cost of the hardware to develop and configure the library.
- The cost of the hardware to host the library (i.e., needed space, bandwidth, etc) for internet access
- The recurring cost of hosting the library.
- The cost of human resources (and needed space) to develop and configure the library:
 - » The number and skill levels of people needed.
 - » The expected salaries.
- The cost of human resources to maintain the library content:
 - » Acquisition of new content.
 - » Review of content to assure it meets the inclusion criteria.
 - » Review of content to assure it meets the quality criteria.
 - » Conversion or digitization of materials.
 - » Identification and addition of meta-data.
 - » Addition of documents to the library.
- The cost of marketing the library.

Appendix: Brainstorming to decide if a digital library should be developed

This appendix addresses some key questions to help organisations brainstorm *if they can and should invest their resources in developing a digital library.*

Brainstorming Questions: Target Audiences

- ? Who is the target audience? Are there several target audiences? Does the target audience change as the library grows?
- ? How does the target audience perceive digital libraries? Does the target audience have prior experience with a digital library?
- ? Where is the target audience located? From where does the target audience access the library?
- ? Is there a clear need for a new digital library?
- ? When does the target audience need to have access to the library?

Brainstorming Questions: Collaboration

- ? What are the benefits of collaboration in the development of a digital library?
- ? With whom should collaboration be established? What are the political ramifications for including or excluding certain people/organizations?
- ? What mechanism should be established to facilitate collaboration?
- ? Under what conditions would a coordinating body be useful?
- ? Who should be included in a coordinating body?

Brainstorming Questions: Quality / Usability of the Digital Library

- ? What makes an interface usable? What are the usability needs of the target audience? How do these affect the design and cost of the library?
- ? What are some of the key factors affecting accessibility? How do industry standard applications as compared to custom solutions affect accessibility?
- ? How should the library be organized and indexed? What types of search functions should be provided? How do the search functions affect the performance, speed and cost of the library?
- ? Is there an identified need to support multiple languages and/or translation (interface, holdings)? What are the resource implications of supporting multiple languages and/or translation?
- ? What type of information should be obtained from a pilot or beta test? How should the pilot or beta test be organized and who should participate? How should the response to the feedback be planned within specified resources?

Brainstorming Questions: Quality of the Holdings in the Library

- ? What review model should be used to ensure quality of the holdings in the library? What are the time and resource implications of implementing this model?
- ? What criteria should be used to determine the quality of a resource? Do these vary by type of resource?
- ? How should reviewers be identified and selected, especially if the library holdings are varied?
- ? What technology and mechanisms can be used to facilitate reviews of the content?
- ? Will the content be limited to resources of minimum quality or will all resources be included?

Brainstorming Questions: Maintaining the Library

- ? What process should be used for content acquisition and obtaining permission to display the content? What are the resource implications for implementing this process?
- ? What are the different types of tools / software packages for digital libraries (open source and commercial content management systems)? What are the pros and cons of these software packages? What are the licensing requirements? Is technical support provided? Are upgrades provided? What is the cost?
- ? What type of feedback from users should be obtained? How and how often will feedback be solicited? How does feedback affect the design of the library? How will feedback be used in updating the library?

Brainstorming Questions: Rights to Distribution and Modifications

- ? What are the copy right issues and other restrictions that need to be considered in the library content and acquisition process? How will these be handled?
- ? What are the ethical considerations related to the library content? How can appropriate credit be given to authors?

Brainstorming Questions: Access and Security

- ? What systems (operating systems, memory configurations) should the library work on? Does the library platform require the purchase of additional plug-ins to work? Does the average user have sufficient bandwidth to access the resources?
- ? Will the library be available on-line to the public or restricted to an intranet? Will there be registered users only? Is a password needed for access? How will registered users and/or guests be able to use the library? What are the permissions and roles for different users of the library including library administrators?
- ? What are the permissions and roles for security? How can the digital library be kept up to date with the continuously increasing security risks for on-line resources?
- ? What is needed to secure the library from hackers? What is the backup plan for restoring the digital library should it be compromised?

List of ALL MERG Documents 2007-2009

- 1. A Framework for Monitoring and Evaluating HIV Prevention Programmes for Most-At-Risk Populations (2007):**
Provides an overview of M&E methods and approaches for most at-risk populations; it covers the use of strategic information for programme planning, M&E. Its focus is on the M&E of targeted HIV prevention programmeM&E. Its focus is on the M&E of targeted HIV prevention programme
- 2. Additional Recommended Indicators. Addendum to UNGASS Monitoring the Declaration of Commitment on HIV/AIDS, Guidelines on Construction of Core Indicators (2008):** Presents the 40 core national indicators that provide minimum necessary information for national-level monitoring of the HIV epidemic and response, and to provide detailed specifications and guidance on the 15 indicators recommended in addition to the 25 UNGASS indicators
- 3. Organizing Framework for a Functional National HIV M&E System (2008):** This framework describes 12 main M&E system components and defines a performance goal and results for each component. The framework helps countries to define an agreed set of national performance objectives and measures for the HIV M&E system and to guide strategies for building capacity, where needed, to reach these objectives.
- 4. Glossary of M&E Terminology (2008):** contains an alphabetical listing of M&E terms and their definitions often with more in-depth explanations than would customarily be provided by dictionary definitions. The Glossary will facilitate and improve dialogue and understanding among all those who are involved in M&E of development activities. It should also serve as a valuable reference guide in M&E training. The selection of terms and their definitions in the attached glossary have been carefully discussed and endorsed by the Global UNAIDS Monitoring and Evaluation Reference Group (MERG)
- 5. Indicator Standards and Assessment Tool (2009):** consists of a set of agreed indicator standards that are relevant at the national level for program managers and service providers, who need to select, revise and use indicators to monitor, manage and implement their country's response to the epidemic effectively monitor. This will ensure that indicators provide decision-makers and key stakeholders with useful, feasible and relevant information. An additional aim is to reduce the burden of global reporting on countries by harmonising global level indicators across multilateral and bilateral organisations
- 6. Planning Tool for Developing a Digital Library of M&E Resources (2009):** A Planning Tool to help assure that users of a digital library can successfully locate resources and can make informed decisions regarding the quality of the materials. The Planning Tool has two purposes: 1) To provide guidance to current owners and future developers of a digital library on the range of issues to be addressed in usability and user-friendliness of the library and 2) To provide a list of questions to help organizations brainstorm if they can and should invest their resources in developing a digital library
- 7. Guidance HIV Monitoring and Evaluation Capacity-building (2009):** provides practical advice for national AIDS programmes that are planning and implementing capacity building activities as part of their effort to develop a unified and effective national HIV monitoring and evaluation (M&E) system. The Guidance is relevant to the wide range of individuals and organisations involved in the national HIV M&E system; it is particularly relevant for the health sector, given its central role in M&E of HIV.
- 8. 12 Components Monitoring and Evaluation System Assessment – Guidelines to support preparation, implementation and follow-up activities (2009):** These Guidelines provide information on the preparation for and implementation of an assessment of the national HIV monitoring and evaluation (M&E) system. It also includes key steps to take after an assessment to facilitate implementation of M&E system strengthening activities. The Guidelines are built around the 12 main components of the HIV M&E system, which define the Organizing Framework for a Functional National HIV Monitoring and Evaluation System (UNAIDS, 2008). Consequently, the Guidelines also focus on using the 12 Components Monitoring and Evaluation System Strengthening Tool (Geneva: UNAIDS, 2009a) to ensure a comprehensive and successful assessment.
- 9. 12 Components Monitoring and Evaluation System Strengthening Tool (2009):** Is a tool is for assessing how well each of the 12 components of a national HIV M&E system is functioning. The tool facilitates the identification of strengths and weaknesses in the national HIV M&E system and the prioritization of system strengthening activities.
- 10. Guidelines for Developing Terms of Reference for Prevention Evaluation (2009):** The Guidelines aim to foster a systematic approach to the evaluation of prevention programs by focusing on an often overlooked yet critical step in evaluation planning: the preparation of terms of reference (TOR). It can be used to facilitate the planning of evaluations for HIV prevention, discussions on the design of these evaluations, and the drafting of TOR to guide such assessments. It is intended for use by anyone who prepares or reviews TOR for evaluations of HIV and AIDS prevention programs and projects.



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