# SAA-ACRL/RBMS Joint Task Force on the Development of Standardized Statistical Measures for the Public Services of Archival Repositories and Special Collections Libraries

## SAA Progress Report

## November 14, 2016

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## BACKGROUND

The SAA-ACRL/RBMS Joint Task Force on the Development of Standardized Statistical Measures for Public Services in Archival Repositories and Special Collections Libraries is responsible for development of a new standard defining appropriate statistical measures and performance metrics to govern the collection and analysis of statistical data for describing public services provided by archival repositories and special collections libraries. The Standard will describe and quantify users of special collections and archival materials and services and their usage of the same, including reading room paging/circulation, paging/circulation of materials for other purposes, reference interactions, reproduction orders, interlibrary loan requests, and events. If feasible, the Standard may also include recommendations for gathering and analyzing statistics about special collections website visitors and their page views and file downloads.

**Officers**
- Christian Dupont, Co-Chair, ACRL/RBMS, Boston College
- Amy Schindler, Co-Chair, SAA, University of Nebraska at Omaha

**Members**
- Moira Fitzgerald (ACRL/RBMS), Yale University
- Thomas Flynn (SAA), Winston-Salem State University
- Emilie Hardmann (ACRL/RBMS), Harvard University
- Jessica Lacher-Feldman (SAA), University of Rochester
- Sarah Polirer (SAA), Cigna Corporation
- Gabriel Swift (ACRL/RBMS), Princeton University
- Bruce Tabb (ACRL/RBMS), University of Oregon
- Elizabeth Yakel (SAA), University of Michigan

## SUMMARY OF MEETING ACTIVITIES

The SAA-ACRL/RBMS Joint Task Force on the Development of Standardized Statistical Measures for the Public Services of Archives Repositories and Special Collections Libraries created by the SAA Council and RBMS Executive Committee in 2014, met seven times in-person and via conference call as a group between September 2015 and August 2016. The in-person meeting in January 2016 during the ALA Midwinter meeting

included eight guests who participated in a lively discussion of their needs and interests for development of public services measures. The meeting in June 2016, during the ALA Annual Meeting included ten guests who shared useful feedback and suggestions on Version 1 of the document released the previous week. Subsets of the task force members met in separate working sessions over a dozen times between September 2015 and June 2016. During the SAA Annual Meeting the task force solicited feedback from attendees on Version 1 of the document in multiple venues including: a lunch open forum attended by 38; the Reference, Access and Outreach Section's Marketplace of Ideas reaching approximately 50 attendess; and a task force meeting that included 6 guests.

**ONGOING ACTIVITIES**

Since September 2015, Task Force members have continued discussions about the proposed standard and the format of the draft document. On June 22, 2016, the Task Force published Version 1 of the document for comment. The comment period will include both the ALA and SAA Annual Meetings and will close on August 22, 2016. For practical reasons, the document was published on the SAA website on June 22 and on the RBMS website on July 28. Comments reaching 18 pages were received via emails to the co-chairs and on the SAA and RBMS websites. These comments, along with continuing discussions of task force members are informing revisions.

Version 1 of the proposed standard divided public services into sevens domains: User Demographics, Reference Transactions, Reading Room Visits, Collection Use, Events, Exhibitions, and Online Interactions. Each domain includes one basic measure, two or more advanced measures, and several recommended metrics. Version 2 will break instruction out of Events into its own domain.

The Task Force meetings at the ALA Midwinter Meeting, ALA Annual Meeting, and SAA Annual Meeting are open to any interested attendees and comments have been received at each meeting since the Task Force's first meeting at the 2014 SAA Annual Meeting.

Information about the Task Force was prepared for the Museum Archives Section newsletter (Winter 2016). Task Force member Emilie Hardman presented the work of the Task Force in the session "Standards and Best Practices for Metrics: Reports from the SAA-ACRL/RBMS Joint Task Forces" at the Spring 2016 New England Archivists meeting along with representatives of the other two SAA-ACRL/RBMS task forces. Members Amy Schindler and Tom Flynn will present information at the Reference, Access and Outreach Section's Marketplace of Ideas at the 2016 SAA Annual Meeting. A session including members of the Public Services and Holdings Counts and Measures task forces has been accepted for the Fall 2016 MARAC meeting.

A full report on the results of the survey conducted by the Task Force in 2015 was not completed. The Task Force began publishing posts sharing the results of the survey by domain during the Version 1 comment period to publicize the comment period as well as

disseminate some of the data from the survey. These posts are available on the [SAA microsite](#).

On April 20, 2016, the Task Force shared its draft definitions for terms, which will be an appendix in Version 1 of the document, with the SAA Dictionary Working Group. The updated definitions as released in Version 1 were shared with the working group in June 2016.

Brenda McClurkin of UT-Arlington has been appointed to the Task Force effective after the SAA Annual Meeting. She will take the place of Jessica Lacher-Feldman as an SAA-appointed member.

A request for a one-year extension, through August 2017, was submitted June 13, 2016, and approved June 27, 2016.

### NEW ACTIVITIES

- Published Version 1 of the standard for comment on June 22, 2016.
- Solicited comments in-person during the Task Force's meetings at the ALA Midwinter, ALA Annual Meeting, and SAA Annual Meeting.
- Reviewing comments received on Version 1 and currently drafting Version 2.
- Version 2 will be released for comment in January 2017.
- Plan to host webinar to share and solicit questions on Version 2 in winter 2017. Will also solicit in-person comments at the ALA Midwinter Meeting in January 2017.