

**Society of American Archivists
Council Meeting
November Day-Day, 2015
Chicago, Illinois**

**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**

**(Prepared by: Amy Schindler, SAA co-chair, and Christian Dupont, ACRL/RBMS
co-chair)**

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 ten times in-person or via conference call as a group between August 2014 and September 2015. At the 2015 SAA Annual Meeting a joint lunch forum with the Joint Task Forces for Holdings Counts and Primary Source Literacy was held on Thursday, August 20, 2015. After brief presentations by each task force, the remainder of the forum was available for questions and comments. The Task Force handout from the forum is attached and available on the Task Force SAA microsite. Approximately 50 attendees were present for the forum. Four attendees joined the seven members of the Task Force in attendance for our meeting on August 21, 2015, providing further valuable discussion and feedback.

ONGOING ACTIVITIES

During fall 2014, the conference call discussions led to the formation of subgroups charged with developing lists of terms, definitions, and current statistical measures for seven functional areas that the task force members determined fit within the scope of their charge, namely: users/customers, visits, collections use, events/activities, reference transactions, reproductions & interlibrary loan requests, and website visits. During December and January the subgroups worked independently to begin fleshing out their respective “domains” documents, maintained in a shared Google Drive folder. This work stalled during spring 2015, as the Task Force co-chairs and members experimented with different approaches to organizing and coordinating their work..

Since June 2015, task force members have been productively drafting a document composed of definitions, basic measures, advanced measures, and metrics, which include guidance for collection, applications, and examples. The intention is to make the basic measure easily collectible by any repository regardless of their staffing level or system in use to collect and report data (paper, spreadsheet, application, etc.) while also providing guidance to repositories that wish to develop robust assessment programs. See the attached handout from the forum held at the SAA Annual Meeting for a sample entry for one of the statistical domains (visits) that presents these elements in the form the Task Force expects to use for its final document. Feedback from the forum confirmed the validity of this approach. Having now a clearer vision of what the completed standardized statistical measurements document will look like has enabled the work to progress more systematically and rapidly through online small-group work sessions conducted via Skype, conference call, or other means, on a weekly or more frequent basis.

From August-September 2015, the Task Force created and solicited responses to a survey designed to gather information from archivists and special collections librarians about current practices and priorities for standardized measures for public services. Despite the length of the questionnaire, 311 complete responses were received. Not surprising, academic libraries and archives contributed the bulk of responses initially, but further promotion and outreach was successful in soliciting submissions from a broader range of repository types:

- Business: 5.8%
- College or university: 51.6%
- Government: 12.3%
- Historical Society: 3.9%
- Museum: 8.1%
- Private or personal: 1%
- Religious: 4.5%
- Research library or manuscript repository: 5.8%
- Tribal: .3%
- Other: 6.5%

Initial analysis revealed that 90.6% of responding repositories collect data of some sort about public services, indicating the relevance and importance of the standard the Task Force has been charged with developing. The numerous opportunities provided for free text responses will require extensive effort to review and code. The Task Force expects to post a report summarizing survey results in the coming months.

NEW ACTIVITIES

- Prepare publicity material (articles for respective newsletters, etc.) with other Joint Task Forces as appropriate.
- Pursue opportunities to present on the Task Force work at relevant conferences.
- Prepare first public draft for feedback in 2016.
- Analyze survey responses.
- Submit recommendations for new and revised terms and definitions to SAA Dictionary Working Group..

QUESTIONS/CONCERNS FOR COUNCIL ATTENTION

None at this time. The Task Force will in the future request an extension to its two-year term ending in August 2016 as it is anticipated that several rounds of public comments and revisions will be required because the draft it will present next spring will represent a new standard reflecting the interests of two professional organizations and will be lengthy and technically detailed.

SAA-ACRL/RBMS Joint Task Force on Public Services Metrics

<http://www2.archivists.org/groups/saa-acrlrbms-joint-task-force-on-public-services-metrics>

Members: Christian Dupont (ACRL/RBMS co-chair), Amy Schindler (SAA co-chair), Moira Fitzgerald, Tom Flynn, Emilie Hardman, Jessica Lacher-Feldman, Sarah Polirer, Gabriel Swift, Bruce Tabb, Beth Yakel

About the task force's charge: 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.

Survey: To gather information from archivists and special collections librarians about current practices and priorities for standardized measures for public services, the task force is requesting your input through a survey. The survey is available at goo.gl/dqWR0f and closes September 21, 2015.

Domains: The task force is working on developing measures and metrics around seven identified public service domains:

1. Visits
2. Collection use
3. Events and activities (instruction, tours, etc.)
4. Users
5. Reference or research transactions
6. Reproductions (includes interlibrary loan)
7. Website (visits, downloads, etc.)

For each domain the task force is drafting definitions of relevant terms, a basic measure, an advanced measure, and recommended metrics.

Visits Example: Reading Room Visits

Basic measure ("Reader Days"):

Count the number of Reading Room Visits made by Registered Users during a 24-hour period, beginning and ending at midnight. Count each Registered User once and only once during the 24-hour period regardless of how many Visits s/he makes during the period and regardless of the visit length.

Note: This statistic is commonly referred to as "reader days."

Guidelines for collection:

- Reading Room Visits can be tallied manually by creating a daily list of individual users who enter the Reading Room, and then counting up the number of unique users were admitted to the reading room that day.
- Visits can be tallied upon entrance or exit from the Reading Room (in properly managed security environment, the number of entrances and exits should, of course, be the same).

Application and examples:

- If a user is admitted to the reading room at 10:00am and works until noon, then signs out to take a lunch break, and then comes back at 1:30pm and works for another hour, count one visit only.
- If a user is admitted to the reading room at 10:00am, quickly consults one item, and then leaves at 10:15am for the rest of the day, count one visit.
- If a user is admitted to the reading room on one day and then returns the next day, count two visits.

Advanced measure (“Reader Hours”):

Calculate the cumulative time that a user spends in the Reading Room during a 24-hour period, beginning and ending at midnight. Record the measure in hours and minutes, hours and fractions of an hour, or minutes. *Note:* This statistic is sometimes called “reader hours.”

Guidelines for collection:

- This measure can be obtained by manually recording and tabulating values, but is more effectively obtained by entering reading room sign-in and sign-out times in a spreadsheet or an automated system that can calculate and report the total amounts of time that individual users spend in the reading room each day.

Application and examples:

- If a user is admitted to the reading room at 10:00am and works until noon, then signs out to take a lunch break, and then comes back at 1:30pm and works until 3:15pm, record a total visit length of 3 hours and 45 minutes, or 3.75 hours, or 225 minutes.
- If a user is admitted to the reading room at 9:00am on the first day and leaves at 11:00am, and then returns the next day at 10:00am and leaves at 12:30pm, record a visit length of 2 hours and 0 minutes, or 2.0 hours, or 120 minutes for the first visit, and a visit length of 2 hours and 30 minutes, or 2.5 hours, or 150 minutes for the second visit.

Recommended metrics

Total visits per day

- Graphing the total number of visits per day over a given period of time can reveal usage patterns. For instance, at academic institutions, total daily visits might increase towards the end of the semester, when research papers are due.

- Comparing the total number of visits per day (or week or month) for multiple years in succession can reveal fluctuations in usage levels and trends.

Average number of visits per day

- Calculating the average number of visits per day for a given period can provide a good baseline metric for comparing activity levels at different reading rooms or repositories. Reading room size and staffing needs would naturally be different at an institutions that receive an average of 0.8 visits per day than one that receives 18 visits per day.

Others: Average visit length, Unique registered users, Newly registered users, Ratio of newly registered users to total users

Further questions or feedback? Contact co-chairs Amy Schindler (amyschindler@gmail.com) and Christian Dupont (christian.dupont@bc.edu).