Standardized Statistical Measures and Metrics for Public Services in Archival Repositories and Special Collections Libraries

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

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

http://www.ala.org/acrl/rbms/acr-rbmtfsm

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INTRODUCTION

BACKGROUND

In order to support increasing demands on institutions to demonstrate the value they provide their constituents, archivists and special collections librarians have become increasingly mindful of the need to gather, analyze, and share evidence concerning the effectiveness of the operations they manage and the impact of the services they provide. Yet the absence of commonly accepted statistical measures has impeded the ability of archival and special collections repositories to conduct meaningful assessment initiatives and the evaluation and establishment of best practices. Recognition of this two-pronged challenge has manifested itself in a number of ways in recent years, including an assessment-themed issue of *RBM: A Journal of Rare Books, Manuscripts, and Cultural Heritage*, published by the Association of College & Research Libraries (ACRL); assessment-related sessions at the meetings of allied professional associations, including the Society of American Archivists (SAA), American Library Association (ALA), and ACRL's Rare Books and Manuscripts Section (RBMS); presentations centered on special collections at the biennial Library Assessment Conference sponsored by the Association of Research Libraries (ARL); and grant-supported initiatives led by ACRL, ARL, and other organizations aimed at building and fostering cultures of assessment and demonstrating the value that libraries and archives bring to their communities and society at large.

Within this context, SAA and ACRL/RBMS constituted a joint task force in 2014 and charged it with developing standardized statistical measures for public services in archival repositories and special collections libraries. The SAA-ACRL/RBMS Joint Task Force on the Development of Standardized Statistical Measures for Public Services in Archival Repositories and Special Collections Libraries consisted of ten members, five appointed by SAA and five by ACRL/RBMS:

- Co-chairs:
  - Christian Dupont (ACRL/RBMS co-chair), Boston College
  - Amy Schindler (SAA co-chair), University of Nebraska at Omaha

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

NAVIGATING THIS DOCUMENT

The Task Force elected to shape the contents of its charge into seven domains, each covering a different area of public services in special collections and archival repositories. Although the domains are interconnected and overlap at points, efforts were made to maintain distinctions to allow for independent collection and analysis of measurements whenever possible. The domains are: User Demographics, Reference Transactions, Reading Room Visits, Collection Use, Events, Exhibitions, and Online Interactions.

Each domain includes a single basic measure within reach of any repository for collection no matter the technology used to gather the data: pencil and paper, spreadsheet, or the newest automated system. The intention is that every repository will collect at least the basic measures, thereby creating the possibility of sharing a common set of statistics that are uniform across many institutions. The domains also contain one or more advanced measures, which repositories may choose to collect as local needs and resources dictate.

The measures are described individually, and are further explained through guidelines for collection and applications and examples for each measure. In addition, recommended metrics are provided to demonstrate different ways in which the measurements can be analyzed, compared, and used by repositories to monitor the effectiveness of their operations and the impact of their services.

Finally, the document's appendix contains a glossary of key terms that are used to define certain standardized measures and metrics, thereby ensuring that their meanings in the context of this document are clear and unambiguous. Whenever possible, the definitions have been borrowed or adapted from other standards and resources commonly used by libraries and archives, although in a few cases it was necessary to formulate original definitions for the purposes of this document. Whenever a defined term is used in the document, it has been capitalized in order to prompt the reader to consult the relevant definition in the appendix.

MEASURES AND METRICS

DOMAIN: USER DEMOGRAPHICS

Basic Measure ("User Type")

Count the number of unique Users who are affiliated with the Repository's organizational home as distinct from all other Users.

Guidelines for collection:

- Identify criteria that distinguish "affiliated" or "internal" Users from "non-affiliated" or "external" Users.
- External Users are those not affiliated with the organization by employment, formal membership, or similar.
- In different organization types internal User types can be defined in numerous ways. For example, in an educational environment internal Users would be instructors, professors, staff, alumni, and students; in private or business environments internal Users would be employees and consultants; in religious organizations internal Users would be religious leaders and congregants; in historical societies internal Users would be members of the organization; in local government archives internal Users would be employees and residents of the locality.
- Exclude Repository staff unless they are consulting the collections for purposes other than their employment with the Repository (i.e., personal or independent research).

Application and examples:

- Count the number of internal Users. Count the number of external Users.
- Archives and special collections that are part of a larger organization should determine whether to count Users from another branch of the same organization as internal or external.

Advanced Measure ("Registered User")

Gather information about the Users who have applied and received permission to gain access to Repository materials (primarily Reading Room visitors).

Guidelines for collection:

- Registered Users are primarily those who have registered for on-site access to the Repository materials via the Reading Room or who have done the same for online access to electronic records not available to the public.
- For Repositories that allow online or pre-registration, only those Users who have completed their registration should be included as Registered Users.

Application and examples:

- Count the number of Registered Users per day/week/month.
- Having the number of Registered Users for a given period of time will allow Repositories to track the number of new Users and provide advanced Reading Room metrics by comparing new and returning Users.

Advanced Measure ("User Affiliation")

Gather information about the affiliation or association of Users as relevant to the Repository.

Guidelines for collection:

- Classify Users according to their relationship or affiliation to the Repository's organizational home such as by department or other unit, employer, alumni, student, citizen of a locality, etc.
- Track where Users call home by zip code, state, country, or other appropriate geographic classification.
- User affiliation may be developed for specific Repository types such as government archives, business archives, academic archives, etc.

Application and examples:

- Track Users as relevant to your organization. For example, some archives would track Users by divisions, departments, or other business units; local government archives may wish to gather information about whether Users are from their locality or another locality; some archives may wish to track student Users by grade level (K-12, undergraduate, or graduate).
- A Repository may decide to track Users who are from a specific nearby museum or other organization because the organization's staff use the Repository so frequently.

Advanced Measure ("Type of Use")

Gather information about why Users are making use of the Repository and categorize the use.

Guidelines for collection:

- Track the reasons Users are using the Repository with categories or predetermined options.
- The reasons Users may be using repositories could include: school, genealogy, publication, administrative, films, media, personal interest, or other reasons.
- Predefined classifications or categories may be developed for specific Repository types such as government archives, business archives, academic archives, etc.
- Repositories may ask Registered Users to identify their own Type of Use and choose to compile Type of Use details for other Users when that information is available.
- Repositories may choose to gather Type of Use data by presenting a list of predetermined options as well as an "other" field. If a free text field is offered with the "other" option, repositories should review the data gathered in that field periodically and review if their

predetermined options are in need of updating. For example, a Repository sees that over time fewer of their Users are using the collection as part of the process of writing books, but more of their Users are involved in the production of films.

Application and examples:

- If the marketing department, alumni association, or other unit in the larger organization that produces articles for publication uses the Repository's holdings in the production of an article, video, or other publication, classify this as an administrative type of use rather than a media use. Instead, classify inquiries from external Users as media use.

Recommended Metrics

Total number of Users by type

- Graphing the total number of Users by type and the total number of visits by type can illuminate a pattern of use.
- Trends over time may point to areas for particular focus. For example, if a Repository is seeing a decreasing number of internal Users making use of the Repository this could point to a need to educate staff of the home organization about the Repository's collections, staff, and services.
- Graphing the total number of Users by type over a given period of time can reveal usage patterns and effectiveness of outreach and marketing programs for different types of Users.

Compare type of use with User type

- Tracking the type of research transaction by the type of User can lead to insights and improvements in information delivery of materials. For example, if external Users are making use of the collection for a specific purpose such as genealogy, the Repository may wish to prepare research guides or other tools highlighting collections of most use to genealogists, do outreach to genealogy groups, or undertake similar activities.

Compare the geographical location of Users (local vs. "out of town")

- Tracking geographical locations of Users could assist in identifying ways to improve service. For example, if the Repository attracts many Users who are not from the local community the Repository may wish to pursue a partnership with the local visitors center to provide other information about the community the Repository is located in to the Users while they are at the Repository.
- By tracking the number of Users and their length of stay, repositories can create and share data about the economic impact the repositories' visitors have on the local economy as part of their advocacy efforts.
- Repositories with a mission focused on a local community may wish to track where they fall in achieving that aim.

DOMAIN: REFERENCE TRANSACTIONS

Basic measure ("Reference Questions")

Count the number of unique Reference Questions received from Users regardless of the method used to submit the request.

Guidelines for collection:

- Count requests on different topics from the same individual as separate questions.
- Do not include directional/general information questions, tours, or instruction sessions.
- Do not include requests from a User to use the next folder, box, item, etc. in a collection while working in the Reading Room as a Reference Transaction.
- Do include an inquiry from a Reading Room User who asks a follow-up question.
- Do not include multiple emails, social media interactions, or other conversations on the same question as separate questions.
- Do include email, social media, or other replies with follow up questions on a new topic as separate questions.
- Some repositories may find it more practical to collect statistics for only a limited period of time rather than continuously. Academic libraries, for example, are sometimes asked to collect and report the average number of Reference Questions received in a typical week, with a typical week defined according to definitional criteria.

Application and examples:

- Tally the number of unique Reference Questions.
- If a User contacts the Repository via email with a Reference Question and then follows up with a clarifying or related question within a reasonable period of time, count this as a single Reference Question. If a User and staff exchange multiple emails related to the same research topic, the Repository may wish to rate this as a single Reference Question, but with a higher "Complexity of Transaction."

Advanced Measure ("Method")

Categorize the method by which a Reference Question is received.

Guidelines for collection:

- Count the methods by which Reference Questions are received. For example, through in-person consultation, telephone, email, social media, website, letter, or other contact.

Application and examples:

- Tally Reference Questions by the method they were received.
- At the annual university strategic planning forum, the university archivist is seated with the director of study abroad and is asked to investigate the history of international programs at the institution. The archivist replies via email with a summary of information

and links to digital material available online. This is counted as one Reference Question asked in-person from an internal User for an administrative purpose.

Advanced Measure ("Time Spent")

Track the time spent by staff on a Reference Transaction with a User.

Guidelines for collection:

- Include time spent in in-person consultation, on the phone, responding to email, etc. as well as time staff spend investigating or conducting research as part of the Reference Transaction.
- Establish a local policy to record either the actual time spent responding to Reference Questions or an estimated amount of time according to fixed intervals (e.g., 15- or 20-minute time blocks).

Application and examples:

- Measure the time spent for each transaction.This will provide more details for resource allocations and assist in delineating the level of assistance or consultation needed to meet the needs of Users.

Advanced Measure ("Purpose of Transaction")

Record the purpose of the Reference Transaction according to a defined rubric. This rubric could be institutionally defined or defined by another body. There are several different types of purposes.

Guidelines for collection:

- Use a rubric for the transaction as defined by your customer base to determine the purpose. A simple rubric could be internal and external purposes. A more complex rubric could be aligned to specific research topics or archives functions.

Application and examples:

- A Repository may wish to record whether the User was seeking information about a Repository's services, the nature of the collection use that it involves, or the intended product or outcome of the consultation. If more than one categorization scheme is employed, care should be taken to avoid conflating statistics from different categories. For example, a tally of the number of genealogical queries should not be added to the number of requests for Reproductions.
    - Repository services: For example, is the purpose of the transaction to request information, request a Reproduction, or request an Interlibrary Loan.
    - Nature of the use: For example, is the purpose of the transaction an internal administrative use, to conduct genealogical research, or conduct research for a class.

- Product: The purpose could also be phrased in terms of end-product: completing a class assignment, conducting research for a publication, or researching your company's branding over time.

Advanced Measure ("Complexity of Transaction")

Record the level of complexity of the transaction based on a predefined scale or category.

Guidelines for collection:

- Predefine a scale or category to ensure consistency over time of the measure collected. An example of a predefined scale is the READ scale. Examples of predefined categories include: ready reference, research assistance, and research consultation meeting.
- Predefined scales or categories may be developed for specific Repository types such as government archives, business archives, academic archives, etc.

Application and examples:

- To assist in creating a complexity scale unique to your repository, determine the types of materials used to respond to the question and the level of staff knowledge needed.

Recommended metrics

Total number of Reference Questions per day/week/month/year

- Graphing the total number of Reference Transactions over a given period of time can reveal usage patterns. For instance, daily Reference Transactions might increase before an academic institution's annual alumni weekend.
- Comparing the total number of Reference Transactions per day/week/month for multiple years in succession can reveal fluctuations in usage levels and trends.

Average number of minutes spent responding to Reference Questions

- Divide the total number of minutes spent assisting Users by the total number of Reference Transactions.
- Comparing the average length of time spent responding to Reference Questions may point to a need to review staffing allocations.

Average number of minutes spent responding to internal vs. external Users

- Divide the total number of minutes responding to internal Users by number of internal Users; do the same for external Users.
- Comparing the average length of time spent responding to internal vs. external Users may point to a need to review a Repository's mission or customer service philosophy.

Relationship of time spent with Users and time spent in Reading Room

- Correlate the staff interaction time (not including retrievals) with Users with the actual length of time Users spent in the Reading Room using Collection Units.

Total number of Users in each demographic per day/week/month/year

- Comparing the number of Users in each demographic category tracked by the Repository can reveal usage patterns and trends.
- Repositories may identify demographic groups whose needs are not being met by the Repository's holdings or staff outreach. For instance, if few alumni make use of an academic archives it may point to the need to market to that demographic group or review collection development in institutional topics of interest to alumni.
- Repositories may be able to attribute changes in Users by demographic year to year to the effectiveness of outreach and marketing programs.

Total number of Reference Questions per day/week/month/year by each User demographic

- Comparing the number Reference Questions received in each User category tracked by the Repository can reveal usage patterns and trends.

Total number of Reference Questions per week/month/year via each method

- Comparing the number of Reference Questions via each method tracked by the Repository can reveal usage patterns and trends.
- Repositories may identify a need for changes in staffing patterns for public service desks.

DOMAIN: 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 they make during the period and regardless of the visit length.

Guidelines for collection:

- Reader Days 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 who were admitted to the reading room that day.
- Visits can be tallied upon entrance or exit from the Reading Room (in a properly managed and secure 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 returns at 1:30pm and works for another hour, count one Visit only.
- If a User is admitted to the reading room at 10:00am, briefly 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 returns the next day to consult the same or new material, 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 or minutes.

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 12:00pm, then signs out to take a lunch break, and returns at 1:30pm working until 3:15pm, record a total Visit length of 3.75 hours or 225 minutes.
- 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, record a total visit length of 0.25 hours or 15 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 2.0 hours or 120 minutes for the first Visit and a Visit length of 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. For all institutions, total daily usage may increase for specific projects, during specific business cycles, or certain times of the year.
- Comparing the total number of Visits per day/week/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 institution that receives an average of 0.8 Visits per day than one that receives 18 Visits per day.

Average visit length

- Comparing the average visit length for a given period can reveal usage patterns and trends.
- Comparing the average visit length by User type for multiple years can reveal fluctuations in usage trends.

Unique Registered Users

- Comparing the number of Registered Users from year to year can reveal usage patterns and trends.
- Repositories may be able to attribute differences in Registered Users year to year to effective outreach programs, publicity, improved facilities, or other Repository changes.

Newly Registered Users

- Comparing the number of newly Registered Users for a given time period can reveal usage patterns. Comparing data may reveal the effectiveness of outreach and marketing programs.
- Compare the return rate of Users; how many Users return to use the Repository multiple times in a given year or year to year.

Ratio of newly Registered Users to total Users

- Compare the number of newly Registered Users as a percentage of total Users.

DOMAIN: COLLECTION USE

Basic measure ("All Checkouts")

Count the number of distinct Checkouts performed for any use. This includes distinct Checkouts performed for Registered Users in the Reading Room during a 24-hour period and distinct Collection Units circulated for all staff services, such as reference work, Reproduction, preservation, description, Exhibition, Events, etc. Count each Checkout once and only once during the 24-hour period regardless of how many times the same materials are consulted during the 24-hour period.

Guidelines for collection:

- Tally using hash marks, Call Slips, or an automated system in use in the Repository.
- Checkouts can be tallied manually by counting the number of unique Call Slips that were handled for each User each day. Per the definition, the Call Slip may include one or more Collection Units.

Application and examples:

- If your institution uses an automated system for recording Checkouts, statistics can be obtained by generating a report for the number of Checkout transactions during a given 24-hour period. In that case, the report options should be configured to count multiple Checkouts for the same Collection Unit to the same User once and only once during the same 24-hour period.
- If a Collection Unit was checked out for Exhibition use, tally only once at either the time material is put on display or removed from display.
- If a Collection Unit is used for three separate sections of the same course or Event within a 24-hour period, count as three uses (in the same manner as three separate Registered Users within the Reading Room).
- If a staff member retrieves a Collection Unit to respond to a reference inquiry from a researcher who is not visiting in-person and the same Collection Unit is digitized (in whole or part), this counts as one staff Circulation.
- If a staff member retrieves a Collection Unit to respond to a Reference Transaction and then the Collection Unit is flagged or designated for additional description by a staff member, this is two staff Circulations.

Advanced measure ("Reading Room Use")

Count the number of distinct Checkouts performed for Registered Users in the Reading Room during a 24-hour period, beginning and ending at midnight. Count each Checkout once and only once per Registered User during the 24-hour period regardless of how many times the Registered User consults the same materials during the 24-hour period.

Guidelines for collection:

- Reading Room Use can be tallied manually by counting the number of unique Call Slips that were handled for each Registered User each day. Per the definition, the Call Slip may include one or more Collection Units.
- If your institution uses an automated system for recording Checkouts, Reading Room Use statistics can be obtained by generating a report for the number of Checkout transactions during a given 24-hour period. In that case, the report options should be configured to count multiple Checkouts for the same item to the same User once and only once during the same 24-hour period.

Application and examples:

- If a Registered User is admitted to the Reading Room at 10:00am and works until 12:00pm, then signs out to take a lunch break, returns at 1:30pm, and then works for another hour with the same material listed on the same Call Slip, count only one Circulation Transaction.

- If a User is admitted to the reading room on one day and then returns the next day to consult the same material, count as two Circulations.
- If material is used by two different Registered Users within a 24 hour period, count as two Circulations.

Advanced measure ("Consultation Hours")

Calculate the cumulative time that a Collection Unit is Checked Out to a Registered User during a 24-hour period, beginning and ending at midnight. Record the measure in hours and fractions of an hour or minutes.

Guidelines for collection:

- This measure can be obtained by manually recording and tabulating values, but is more effectively obtained by entering Unit use ("Checkouts") in a spreadsheet or an automated system that can calculate and report the total amounts of time that units are being consulted each day, week, and month.

Application and examples:

- If a User is admitted to the Reading Room at 10:00am and works until 12:00pm, then signs out to take a lunch break, returns at 1:30pm and works until 2:15pm with the same material, the consultation hours total 3.25 hours or 195 minutes.
- If a User is admitted to the Reading Room on multiple days consulting the same material, count the total Consultation Hours by each day.
- If multiple Users are working together using the same Collection Unit such as a single volume or ledger, the Consultation Hours are the total time the Collection Unit was in use not the total time the multiple Users were in the Reading Room.

Advanced measure ("Exhibition Use")

Count the number of distinct Checkouts performed for Collection Units included in Exhibitions at the Repository or loaned for Exhibition. Count each Checkout once and only once for the duration of the Exhibition or loan.

Guidelines for collection:

- Exhibition use can be tallied at the time material is put on Exhibition or returned from display.
- This measure can be obtained by manually tabulating or automated system.

Application and examples:

- Use can be tallied manually by counting the number of unique Call Slips that were created for each Exhibition use. Per the definition, the Call Slip may include one or more Collection Units.
- If a Reproduction of an item held by the Repository is displayed, count as one use for the item even though the original was not used and whether or not the original was Checked Out to be reproduced.

Advanced measure ("Event and Activity Use")

Count the number of Collection Units circulated for instructional use, tours, presentations, and other Events and activities. Count each Collection Unit separately for each class session or other event.

Guidelines for collection:

- Instructional use can be tallied by counting the number of Collection Units pulled for class use either within the Repository or in the classroom setting.
- Count the number of distinct Collection Units circulated for any event or activity including outreach and advocacy Events. Examples may include events for friends groups, lectures, tours, fundraising Events, etc. This metric records collection use, not the number of people visiting an event. See also Visits Use.
- If material is temporarily placed on display for a limited time only for the duration of a program, lecture, reception, or other event, then that is considered Event and Activity Use, not Exhibition Use.

Application and examples:

- If a Collection Unit is used for three separate sections of the same course, event, or other activity within a 24-hour period, count as three Uses (in the same manner as three separate Registered Users within the Reading Room). For example, if three tours are conducted on the same day as part of an Archives Month event count as three uses.

Advanced measure ("Staff Reference Use")

Count the number of Checkouts performed for reference services performed by Repository staff.

Guidelines for collection:

- Tally using hash marks, Call Slips, or automated system in use in Repository.
- If a staff member retrieves a Collection Unit to respond to a Reference Transaction over multiple days, this counts as one Staff Reference Use.

Application and examples:

- If staff are repeatedly retrieving material to respond to Users not visiting the Reading Room, this could point to material to be prioritized for further description and digitization.

Advanced measure ("Total Reproduction Requests")

Count the Total Reproduction Requests by tallying the total number of distinct requests filled by Collection Unit.

Guidelines for collection:

- Do not count Reproduction requests not filled. A request could be unfilled because the User is directed to the material already available in a published source, freely available online, etc. A Reproduction request may also be unfilled because of the condition of the original, donor requirements, or for other reasons.
- Count the distinct number of Reproduction requests fulfilled from a single User. If a User requests Reproductions during a Reading Room Visit and then later requests Reproduction of other Collection Units, this counts as two separate Reproduction requests.
- This includes duplication by digitizing, photocopying, or other means of reformatting that creates a duplicate copy of the original material of any native format for the User.
- Repositories may have varying policies on when or if Reproductions are allowed for some or all uses including, but not limited to personal research, publication, and other uses. Repository policies on whether or not fees are assessed for Reproductions requested by some or all types of Users will vary.

Application and examples:

- The frequency that material are being duplicated to respond to Reference Questions could point to material to be prioritized for reformatting projects of the Collection Unit to reduce wear and tear on the original material and the ongoing need for duplication services to be provided by staff.

Advanced measure ("Reproductions")

The total Reproductions made from an original Collection Unit as measured by the number of outputs at the request of Users.

Guidelines for collection:

- Count the total number of distinct Collection Units that have been reproduced by Repository staff whether measured by pages, images, or other capture unit.
- If you are making digital copies of an original, count the number of files created.

Application and examples:

- If a Repository chooses to digitize an image at a higher resolution than that requested by the User for use as a master copy, even though multiple digital files may eventually be created, it should be counted as a single output or Reproduction.
- The frequency that material are being duplicated to respond to Reference Questions could point to material to be prioritized for reformatting projects of the entire Collection Unit that can reduce the ongoing need for duplication services.
- The number of Reproductions could point to unmet demands for alternate methods of distribution, such as publication or online access that could be considered by a Repository.
- Changes in the number of Reproductions requested and created over time could point to changing staff or other resource needs.

Advanced measure ("Interlibrary Loan Requests Received")

Count the number of requests received for Collection Units via an interlibrary loan transaction.

Guidelines for collection:

- Count the total number of requests received whether filled or not by the Repository.

Application and examples:

- The number of requests received could point to demands on staffing resources to determine whether or how to fill the request (loan, reproduce, or turn down request).
- The number of requests could point to unmet demands for alternate methods of distribution, such as publication or online access that could be considered by a Repository.

Advanced measure ("Interlibrary Loan Requests Filled")

Count the total number of Collection Units loaned or reproduced as a result of a request received through an interlibrary loan transaction.

Guidelines for collection:

- Count the total number of requests filled including items loaned or reproduced to provide a surrogate.

Application and examples:

- The number of requests filled could point to demands on staffing resources to fill the request (packaging material for shipment to fill loan or creating Reproductions).
- The number of requests could point to a need to review the Repository's interlibrary loan guidelines if there is a low fill rate.

Advanced measure ("Interlibrary Loan Requests Sent")

Count the number of requests sent by the Repository to other repositories requesting loan of a Collection Unit on behalf of a User.

Guidelines for collection:

- Count the total number of transactions requesting to borrow Collection Units.

Application and examples:

- The number of requests made could point to demands on staffing resources.

Recommended metrics

Total Collection Units circulated daily/weekly/monthly/yearly

- Graphing the total number of Collection Units circulated in a Reading Room over a given period of time can reveal usage patterns. For instance, at academic institutions total daily use might increase towards the end of the semester when research papers are due, suggesting a possible value to Users in extending Reading Room hours during peak intervals. At non-academic institutions, total daily usage may increase for specific projects, during specific business cycles, or times of the year.
- Comparing the total number of Collection Units circulated daily/weekly/monthly/yearly for multiple years in succession can reveal fluctuations in usage levels and trends.

Average number of Collection Units circulated daily/weekly/monthly/yearly

- Calculating the average number of Collection Units circulated for a given period can provide a useful baseline metric for comparing activity levels at different Reading Rooms or repositories. Reading Room size and staffing needs would naturally be different at an institution that circulates an average of 5 Collection Units per day than one that circulates 25 Collection Units per day.

Average time of use per Collection Unit

- Calculating the average time of use of Collection Units can provide another index of intensity of use and need for Reading Room support. Do Users typically spend hours with a book or box of materials or do they tend to use the Reading Room as a "photo studio" and capture many images of material on their personal digital cameras for later study?

Average time of use per User

- Calculate the average time Users use Collection Units to allow staff to determine usage patterns by dividing units by the number of Users.

Average time of use per Circulation Transaction

- Calculate the average time Collection Units are used per transaction by dividing units by number of transactions as another way to determine usage patterns.

Total number of times Collection Unit is consulted

- Tracking the most frequently used Collection Units in the Repository can allow staff to review for potential reformatting, conservation treatment, or other actions to ensure the material is preserved and accessible.

Ratio of unique Users per collection use

- Totaling the number of unique Users who Checkout a Collection Unit and then dividing that number by the total number of times the Collection Units were checked out yields a ratio of unique Users per collection use. This ratio provides an index that can be useful in assessing the relative research value of collections. For example, collections that are consulted by a greater proportion of users may be deemed to have a greater, or at least broader research value. For example, an archival collection from which 100 boxes (Collection Units) are Checked Out to 20 unique Users during a given year would have a unique-user-to-collection-use ratio of 0.20, compared to another collection from which 100 boxes were Checked Out during the same period but to only 5 different Users—a ratio of 0.05.

Ratio of Reproduction requests to Reading Room Visits

- Calculate the ratio by dividing the number of visits by Reproductions.
- Calculating the average number of Reproduction requests per User can reveal changes due to the use of personal cameras and other devices in the reading room.

Total Reproductions daily/weekly/monthly/yearly

- Calculate the total number of Reproductions by staff during the determined time period. This will assist with ensuring sufficient resource allocation.

Average number of Reproductions daily/weekly/monthly/yearly

- Add the total number of Reproductions during the given time frame and divide it by the length of the time frame being investigated. For example, if you wanted to determine the average number of pages reproduced per month during a 6 month period, you would add the total number of pages reproduced during the 6 months selected and divide it by 6 (the number of months).
- Average number of pages reproduced per time frame allows repositories to view trends in demands for this service over time.

Average number of pages reproduced per User

- Add the total number of pages reproduced during the desired time period and divide that by the total number of Users during that same duration. This provides the average number of pages reproduced per User. This would allow a Repository to prioritize resources such as staff availability or equipment for Reproductions.

Compare total number of ILL daily/weekly/monthly/yearly

- Graphing the total number of ILL requests for a selected day/week/month/year over a period of time can reveal usage patterns. These could then be used to make staffing decisions. Changes in requests over time might also reveal the impact of backlog

processing and cataloging projects or making records visible via a public catalog, consortial catalog, or WorldCat.

DOMAIN: EVENTS

Basic Measure ("Number of Events")

Count the number of Events organized by staff including instruction sessions, presentations, tours, and other Events, typically with a literary, cultural, or educational intent.

Guidelines for collection:

- Each section of a term-long course is counted as a separate Instruction Session.
- Curatorial tours, lectures, receptions, and other related Exhibition Events that are organized by the Repository are counted as separate Events apart from the Exhibition installation itself. See also Exhibitions domain.

Application and examples:

- A talk is given to a friends group and is repeated at a later date to a community organization. This would count as two Events.
- A historical society installs an Exhibition that is open for three months. It also hosts an opening reception, hosts two evening lectures that are related to the Exhibition content, and offers a monthly curator's chat for the Exhibition each month it is on display. The historical society would tally a total of 6 Events: 1 opening reception, 2 evening lectures, and 3 monthly curator chats. The Exhibition would be counted separately in the Exhibitions domain.
- In the case of a term-long course that uses the Repository's holdings and is taught or co-taught by Repository staff, each class meeting is counted as a separate Event. If the course meets twice a week for ten weeks, this would be twenty Events.

Advanced Measure ("Number of Attendees")

Count the number of individuals who attend an Event.

Guidelines for collection:

- Attendees can be tallied manually by creating an exact or approximate count of the number of visitors who attend Events.
- Viewers of live online sessions, webcasts, or similar should be counted here. Repositories may count using Online Interactions advance measure Social Media Engagement when appropriate, such as number of ongoing viewers of a pre-recorded lecture on YouTube.

Application and examples:

- If a course with 24 registered students visits the Repository for an Instruction Session, but only 20 of the students are present count the number of students who attend not the total number expected.
- If a Repository requests RSVPs, if possible, count only the number of people who actually attend the Event.
- Repositories may wish to include demographic information about attendees when available. See also User Demographics domain.

Advanced Measure ("Type of Event")

Categorize the type of Events organized by staff, hosted by the Repository, or at which staff present. Events may include classroom session, instruction sessions, lectures (by staff or others), other presentations, performances (musical, theatrical, or other), receptions, tours, open houses, donor Events, and other Events and activities. The Events may or may not specifically relate to the Repository's holdings or staff expertise.

Guidelines for collection:

- A classroom session is a visit by a class in which material is used to support the course, but staff do not provide instruction, which distinguishes it from an instruction session.
- For individual one-on-one instruction, see Research Consultation.
- Events may typically, but not exclusively, have a literary, cultural, or educational intent.

Application and examples:

- A Repository is hosting an Event that includes a reception before a lecture. This would be counted as one Event and categorized as a lecture event not a reception because the substantive portion of the event is the lecture.
- A donor recognition reception that includes brief remarks or presentation by staff would be categorized according to the substantive part of the event, which in this example would be as a reception.

Advanced Measure ("Event Preparation Time")

Track the time spent preparing for an Event. This could include research, retrieving material, conservation treatments for items to be displayed, preparing remarks, publicity, set-up, or similar activities.

Guidelines for collection:

- Record the measure in hours and fractions of an hour or minutes.

Application and examples:

- An increasing amount of time spent preparing for Events could point to the need to alter staffing to meet needs related to publicity and marketing, event preparation, facility preparation, or similar activities.

- The amount of time required to prepare for different types of Events (instruction sessions vs. lectures, tours vs. open houses, Wikipedia Edit-A-Thons vs. presentations, etc.) could assist the Repository in future Event planning especially when paired with other measures such as number of attendees or other outcomes such as media coverage, donations, etc.

Advanced Measure ("Length of Event")

Measure the total duration of the Event.

Guidelines for collection:

- Record the measure in hours and fractions of an hour or minutes.
- Calculate the total length of time an Event lasts. For starting and ending times, use the time when the Event is scheduled to begin and end. Do not include setup or arrival (e.g., "doors open at") times or breakdown and cleanup times. Do include question-and-answer period, receptions, and other segments that include Event attendees that are advertised or intended to be part of the Event.

Application and examples:

- Your Repository is hosting a public lecture given by a popular local author. Invitations and announcements for the event indicate that the event will start at 6:00pm with doors opening at 5:30pm. The announcement also mentions that a reception will follow the lecture. Staff arrive at the event location at 5:00pm to ensure that audio-visual equipment is working. Staff signal the caterers to begin cleaning up at 7:45pm as the last attendees are leaving. Staff secure the location and go home at 8:30pm. In this case, the total length of the event should be recorded as 1.75 hours or 105 minutes.
- A faculty member has arranged to bring her students to your Repository for an interactive instruction session. According to the course schedule, the class is scheduled to start at 1:50pm and end at 2:40pm. A few students linger afterwards to take a closer look at some of the materials that were shown and ask the staff member questions. They leave at 2:45pm. The total length of the event may be recorded as either 50 minutes or 55 minutes. For the sake of ease and consistency in collecting statistics, it may be more practical to apply a policy of calculating event length using the published course hours rather than trying to capture the length of engagements that begin early or "spill over" the official end time.

Recommended metrics

Total Events per day/week/month/year

- Graphing the total number of Events over a given period of time can reveal patterns of usage, outreach, and public interest.
- Comparing the total number of Events per day/week/month/year for multiple years can reveal fluctuations in usage levels and other trends.

Average number of Events per day/week/month/year

- Calculating the average number of Events for a given period of time can provide a baseline metric for comparing activity levels between different departments or repositories.

Average items used per Event

- For Events that involve temporary displays or presentations of collection materials, such as instruction sessions or donor Events, calculating the average number of items used per Event can provide insights into the degree to which collection materials are exposed through Events.

Average preparation time per items used for an Event

- Calculating the average time spent preparing items for Events can point to staffing needs and potential adjustments to staffing levels based on increasing or decreasing numbers of Events sponsored by the Repository.

Average attendees per Event

- Calculating the average number of attendees per Event can provide a consistent index for comparing attendance across Events of the same type or during different periods. For example, it might be useful to compare the average number of attendees at all lecture programs from year to year to gauge the success of program series and promotion.

Average preparation time per Event

- Calculating the average amount of time staff spend preparing for and staffing Events can provide insights into the level of staffing needed to maintain or grow a Repository's Events program.

Average preparation time per attendee

- Tracking the average amount of time staff spend preparing for Events per attendee can point to the effectiveness of the infrastructure in place to support outreach and specific programming. The data could help staff select Events with a higher impact level as calculated by the amount of staff time invested and the number of attendees.

DOMAIN: EXHIBITIONS

Basic measure ("Number of Exhibitions")

Count the total number of Exhibitions installed or presented by the Repository.

Guidelines for collection:

- Count the total number of new Exhibitions curated during the time period measured.
- Include physical, online, traveling, pop-up, or other curated displays of material from the Repository.

- If an Exhibition has more than one manifestation, count each manifestation separately (e.g., count a physical Exhibition and online correlate as two Exhibitions).
- Include Exhibitions at your Repository curated by students or guest curators who are not Repository staff.
- If your Repository creates a traveling Exhibition, count the number of times the Exhibition is installed at other venues. If you install a traveling Exhibition created by another Repository, only count your installation of that Exhibition.
- Do not count catalogues, brochures, or corollary publicity materials that are produced in conjunction with an Exhibition (see Advanced Measure below).

Application and examples:

- If the number of Exhibitions is tallied on an annual basis, count only those Exhibitions that opened during the year; do not count Exhibitions that were installed during the previous year but remain on display during the current year.
- The number of Exhibitions created could point to demands on staffing resources or preservation needs for items frequently exhibited.
- An increase or decrease in Exhibitions could point to a need to review the organization's mission.

Advanced measure ("Exhibition Duration")

Count the total number of hours an Exhibition is available for viewing during the course of an installation.

Guidelines for collection:

- Exhibition Duration can be calculated by totaling the number of hours the Exhibition is available for viewing during regular business hours and special Events.

Application and examples:

- If an Exhibition is installed for four weeks, the Repository is open to the public 30 hours per week, and its Exhibitions are accessible for those 30 hours, count 120 hours for the Exhibition Duration.
- If an Exhibition is opened for viewing during an evening or weekend reception or in conjunction with another Event outside of regular business hours, count and include those hours in the total calculated for Exhibition Duration.
- Tracking Exhibition Duration can assist repositories in monitoring light exposure documents are subject to and ensure proper preservation of frequently exhibited materials.

Advanced Measure ("Exhibition Visitors")

Count the number of individuals who visit an Exhibition.

Guidelines for collection:

- Visitors can be tallied manually by creating a daily count of the number of visitors who view Exhibitions. Visitors can be tallied using computerized or door counters if the Exhibition space is enclosed and can be equipped with the appropriate counters.
- Using a visitors book to solicit visitors' comments and city can provide some daily measure for gallery spaces that cannot be equipped with an automatic counter nor allow for manual counting.
- For Visitors to online Exhibitions see Online Interactions measures Page Views and Unique Page Views.

Application and examples:

- If a staff member or volunteer docent gives a tour of an Exhibition, count and include the attendees in the Number of Attendees total calculated for the Events domain.

Advanced measure ("Exhibition Preparation Time")

Measure the amount of time staff spend preparing an Exhibition.

Guidelines for collection:

- Count in hours the total time spent by all staff, interns, volunteers, contractors, or other persons affiliated with the Repository in preparing an Exhibition including research, retrieving material, conservation treatments, making Reproductions, preparing material for display, design, installation, or other aspects of preparation for the Exhibition.

Application and examples:

- The time spent on Exhibition creation over time could point to changing demands on staffing resources.

Advanced measure ("Exhibition Types")

Track the types of Exhibitions curated by the Repository differentiating those displayed physically in the Repository, displays in locations outside of the Repository, online Exhibitions, traveling Exhibitions, pop-up Exhibitions, or other measurable displays of material from the Repository.

Guidelines for collection:

- Exhibitions can be installed in locations remotely whether within the Repository's larger organization, external to the organization, or online.

Application and examples:

- If an Exhibition is installed in the Repository and an online version is published both are counted.

Advanced measure ("Exhibition Publications")

Count catalogues, brochures, and other publications or publicity materials produced in conjunction with an Exhibition.

Guidelines for collection:

- Count each publication separately.
- Publication and publicity materials may include printed or electronic catalogues, brochures, checklists, handouts, bookmarks, posters, advertisements, invitations, and other types of ephemera produced in conjunction with an Exhibition.
- Do not count press releases, blog posts, social media posts, broadcasts, interviews and other forms media publicity.
- Some repositories may wish to also count direct and indirect expenditures used to create publications and publicity (e.g., design, printing, and mailing costs, and staff time).

Application and examples:

- Track how many publications are taken by Exhibition visitors. How has this number changed over time? What impact do publications have on other facets of the Repository's work; for example does an Exhibition visitor who took a brochure contact the Repository in the future to offer a donation.

Recommended metrics

Total number of Exhibitions opened per year

- Tallying the total number of Exhibitions opened per year provides data as to how the Repository's material is being used beyond research. For example, these numbers could be combined with Exhibition visitors to demonstrate if the number of Exhibitions mounted increased the number of visitors or does Type of Exhibition correlate with visitor numbers.

Total Visitors per Exhibition or year

- Calculating the total number of visitors per Exhibition will allow repositories to determine the popularity of specific topics and aid curators in planning future exhibitions.
- Graphing the total number of visitors per year can reveal usage patterns. For instance, total visitors to Exhibitions may increase during specific days, weeks, or months.

Average number of visitors per Exhibition

- Determined by adding the total number of "Exhibition visitors" and dividing that number by the total number of "exhibits mounted".

Average number of Exhibition visitors per day/week/month

- Divide total length of Exhibition by total number of visitors.

Conduct a cost-benefit analysis of Exhibition publications

- Track the number of publications distributed during the Exhibition compared to the total number of publications produced. This will analyze the spend/expense.

DOMAIN: ONLINE INTERACTIONS

Basic Measure ("Page Views")

Count the total number of Page Views of content published online by the Repository for viewing by Users. Page Views may include, but may not be limited to: the Repository's website, finding aids, online exhibits, digital collections, or digital objects during the time frame selected by the institution (ex. Daily, Weekly, Monthly, Yearly)..

Guidelines for collection:

- Page Views of each individual page are added to represent the basic measure.
- If possible, exclude "Page Views" by the Repository's own staff (for example, by filtering out a block of IP addresses assigned to staff workstations).
- If possible, exclude reloads of a given page.
- Exclude usage statistics derived from social media sites maintained by the Repository; see Social Media Reach.

Applications and Examples:

- The application of Page Views would show how strong a Repository's web presence is. What pages are being viewed most and how does that number trend over time (monthly, yearly)?

Advanced Measure ("Unique Page Views")

Count the number of unique Page Views made by unique Users during a designated time frame selected by the institution (Daily, Weekly, Monthly, Yearly). Count each User once during the selected period regardless of how many Page Views are made during the period and regardless of the visit length.

Guidelines for collection:

- If a User visits the same page multiple times during the same session, the view is only counted once.
- If possible, exclude the "unique Page Views" of Repository staff.

Applications and Examples:

- Track the "unique Page Views" during the defined time period to provide information on the size of your online audience.

Advanced Measure ("Session Time")

Calculate the cumulative time a User spends on an individual page during a time frame selected by the institution (Daily, Weekly, Monthly, Yearly). Session time should only include active viewing by the User. Inactivity of 30 minutes or more by the User should be considered an end to the session and accumulated time should be counted prior to the start of the 30 minutes of inactivity. The total number of sessions conducted by an individual User, the individual session times, and the cumulative time of all sessions should be counted. Record the measure in hours and minutes, hours and fractions of an hour, or minutes.

Guidelines for collection:

- A Repository may wish to determine the activity of Users in relationship to the types of materials offered. The time may influence the bandwidth needed to allow Users access to materials to ensure all Users can access materials.
- Calculating the session time will allow for detailed reporting on trends over time to evaluate User behavior.

Applications and Examples:

- An IP address views an online Exhibition and stays active on the page for an hour and then is inactive for 15 minutes, but becomes active again for another hour. The total session time for that IP address would be 2 hours.
- Session times during times of high activity could affect all Users who need access to materials.

Advance Measure ("Traffic Source")

Determine and count what links the User is clicking to arrive at the various webpages related to the Repository and its online content. This includes direct traffic (clicks from bookmarks or visitors who know the URL), Web searches, links from external sites navigating a User to the Repository, and internal links transferring Users from one part of an organization's or Repository's site to another.

Guidelines for collection:

- Calculate the traffic source through tally or percentage of Users on the site arriving through that source.
- Percentage would be calculated by dividing the number of Users from a traffic source divided by the total number of Users tallied during the corresponding time period.

Application and examples:

- Incoming traffic sources could point to successful outreach initiatives using external sites such as adding a link from a Wikipedia entry to related digitized material or a finding aid.
- Traffic source could be used as a situational measure. For example it could be used following an online exhibit to determine how Users were finding their way to the content.

Advanced Measure ("Downloads")

Count the number of times a digital object was downloaded during a selected time period (daily/weekly/monthly/yearly). This would include, for example, if a digital image was downloaded multiple times by the same User during the selected timeframe.

Guidelines for collection:

- Tally the number of times a digital object was downloaded.

Application and examples:

- Counting downloads offers another measurement of usage of Collection Units.
- By counting the number of times a digital object is downloaded, the Repository may be better able to select materials of interest to its Users by providing a data point in the prioritization of materials to make available online.

Advanced Measure ("Downloaded Material Type")

Create categories of digital object types and count the total times each object type is downloaded by all Users during a 24 hour cycle starting and ending at 12 midnight.

Guidelines for collection:

- Categories may include, but are not limited to textual, image, moving image, and audio files.

Application and examples:

- Counting items downloaded will allow the Repository to better select materials of interest to its Users and provide a method to prioritize and allocate resources to make these resources available online.
- If a User downloads a set of pages during one 24 hours cycle (as defined by the Repository); if the same User downloads pages in the next cycle then they would counted again. A 24 hour cycle could be from closing time day to closing time the next day; opening time to opening time the next day; 12 midnight to 12 midnight.

Advanced Measure ("Social Media Reach")

Count the total number of users who follow or friend any of the Repository's social media accounts.

Guidelines for collection:

- Count the number of interactions with each social media resource. Report the type of interaction counted.
- Repositories may wish to keep the counts for each resource separate in order to facilitate longitudinal comparisons and evaluations of the distinct reach and impact of each resource.

- Interactions types may include number of followers, likes, comments, shares, retweets, etc.

Application and examples:

- A Repository that maintains a Facebook page and two or more Twitter accounts may wish to tally separately the number of Facebook likes while tallying and combining the total number of Twitter followers across all Twitter accounts.
- A Repository that maintains a Twitter account may wish to count the number of tweets that it publishes, as well as retweets of its tweets by others in addition to the number of followers it has.

Recommended Metrics

Total Page Views per day/week/month/year

- Graphing the total number of Page Views per day over a given period of time can reveal usage patterns. For instance, at academic institutions, total daily Page Views might increase towards the end of the semester, when research papers are due. For all institutions, total daily Page Views may increase for specific projects, during specific business cycles, or at times of the year.
- Comparing the total number of Page Views per day/week/month/year for multiple years in succession can reveal fluctuations in usage levels and trends.

Percentage of single page visits over some period of time (bounce rate)

- Comparing the total number pages to single page visits may indicate the types of information being reviewed or may indicate accidental visits to the site.

Percentage of return visits over some period of time (loyalty)

- Reviewing the number of return visit may indicate the interest in materials on the site and determine whether there may be potential demand to add additional related materials to the site.

Average session time per day/week/month/year

- Determining session time may reveal the value of the content on the site.
- Determining average session time will indicate if there is enough bandwidth for Users to access the materials.
- Generally anything over 60 seconds is seen as commitment although Eric Peterson (2004) has argued that visitors who spend less than 90 seconds are uninterested. (Commitment)

Total session time per day/week/month/year

- Collecting the total session time for a specific time period will indicate the value of the content and may indicate if additional or related materials should be added to the site.
- Determining total session time for a specific time period will indicate if there is enough bandwidth for Users to access the materials. This maybe useful during high activity times such as term end, project end, end of year activities.

Number of unique Users per day/week/month/year

- Each unique individual that visits your site within a measured period. A visitor who returns to your site within the measured period is only counted once.

Percent of new User sessions per day/week/month/year

- The percentage of new visitors to view your website content within a measured period.

Items downloaded per day/week/month/year

- Calculating how many digital objects were downloaded over a measured period. A Repository may also wish to distinguish the file types of downloaded material.

Average items downloaded per User

- After calculating the number of unique Users that visited digitized Collection Units and the times a digitized unit was downloaded, determine the average number of downloaded Collection Units per unique User. This metric could show trends in terms of collection popularity and use over days, weeks, months, or years.

Traffic source per day/week/month/year

- Track the number of Users being directed to your content from the unique links available to determine any pattern in traffic sources. For instance 40 percent of the Users visiting your latest digitized archival collection may be coming from a link posted on a social media platform. Comparing how traffic is navigating to the content can provide insight for effective future marketing.

APPENDIX A: GLOSSARY

The following list contains terms that are used to define standardized measures and metrics for public services in special collections and archival repositories. A standardized definition for each term is provided to ensure that its meaning in the context of this document is clear and unambiguous. Whenever possible, the definitions have been borrowed or adapted from other standards and resources commonly used by libraries and archives, although in a few cases it was necessary to formulate original definitions for the purposes of this document.

Whenever a defined term is used in the measures and metrics section, it has been capitalized in order to prompt the reader to consult the definition.

The standards and resources from which definitions have been drawn include the following.

National and International Standards:

- **ANSI/NISO Z39.7-2013** "Information Services and Use: Metrics and Statistics for Libraries and Information Providers - Data Dictionary"
- **ISO 2789:2013** "Information and documentation – International library statistics"
- **ISO 16439:2014** "Information and documentation – Methods and procedures for assessing the impact of libraries"
- **ISO 5127:2001** (currently under revision) "Information and documentation – Vocabulary"

Glossaries, guidelines, statistical surveys, and additional resources:

- **Interlibrary Loan Code for the United States**, approved by the Reference and User Services Association, a division of the American Library Association, 2016.
- **IMLS Public Libraries in the United States Survey**, Fiscal Year 2014, State Characteristics Data Element Definitions
- **Multilingual Archival Terminology**, an online glossary published by the International Council for Archives
- **InterPares 2 Terminology Database**, International Research on Permanent Authentic Records in Electronic Systems (InterPARES) 2 Project: Experiential, Interactive, Dynamic Records (2002-2007)
- **ODLIS**, Online Dictionary for Library and Information Science, by Joan M. Reitz (Libraries Unlimited, 2004; ABC-CLIO)
- **SAA Glossary**, *A Glossary of Archival and Records Management Terminology*, by Richard Pearce-Moses (Society of American Archivists, 2005)
- **Web Analytics Definitions**, published by the Web Analytics Association (now Digital Analytics Association), version 4.0, 2007.

Call Slip

A brief form, typically completed by a user, though sometimes by Repository staff, used to request materials for consultation or other purposes from the closed stacks of a library or archives.

Source: Adapted from ODLIS, Call Slip: "A brief form that the user must fill out to request an item from the closed stacks of a library or archives, or from some other nonpublic storage area, usually retrieved by hand by a staff member called a page, although automated and semi-automated retrieval systems are used in some large libraries."

Synonyms: request slip; paging slip

Related terms: Checkout

Comment: Call Slips may be created manually or electronically. Individual Call Slips are generally completed for each Collection Unit that is retrieved and circulated to facilitate tracking and reshelving.

Checkout

The act of recording the removal of a Collection Unit from its place of storage so that it may be issued to a Registered User in a Reading Room or for other purposes.

Source: Adapted from ISO 5127:2001, 5.2.05 Charge Out: "act of recording the removal of documents (1.2.02) from their place of storage (1) (4.3.1.1.01)." Compare ODLIS Checked Out: "The circulation status of an item that has been charged to a borrower account and is not due back in the library until the end of the loan period."

Synonyms: charge out, loan

Related terms: Call Slip; Circulation Transaction

Comment: Generally refers to the process whereby Repository staff record the issuance of materials to Registered Users for consultation in a Reading Room, but may also be applied to other situations in which a record is made of the removal of materials from their permanent storage locations for other purposes, such as for use in an exhibition, instructional session, etc.

Circulation Transaction

The cycle of retrieving, issuing, returning, and reshelving Collection Units.

Source: Adapted from ODLIS, Circulation: "The process of checking books and other materials in and out of a library. Also refers to the total number of items checked out by library borrowers over a designated period of time and to the number of times a given item is checked out during a fixed period of time." See also Beth M. Whittaker, "Using Circulation Systems for Special Collections: Tracking Usage, Promoting the Collection, and Address the Backlogs," *College & Research Libraries* 69/1 (January 2008), 29, where circulation within a special collections environment is defined as "usage of materials within a secure reading room." Compare ISO 5127:2001, 5.4.05 Reading-Room Lending, which is defined as the "transfer (2) (4.1.2.04) of

documents (1.2.02) from their place of storage (1) (4.3.1.1.01) to another location inside an information (1) (1.1.3.08) and documentation (1.2.01) organization for consultation purposes." Compare also ISO 2789:2013 2.2.22 On-site Loan: "document delivered, in most cases from closed access, for use on the premises."

Related terms: Checkout; Call Slip; Reading Room; loan; on-site loan

Comment: In a special collections environment, a Circulation Transaction for whatever purpose may be most simply and broadly defined as the temporary removal of collection materials from their permanent storage locations, which is synonymous with the ISO 5127: 2001 5.4.03 definition for Loan: "physical transfer (2) (4.1.2.04) of documents (1.2.02) from their place of storage (1) (4.3.1.1.01) to another location for a defined period of time." A Circulation Transaction is essentially a temporary loan process.

Collection Unit

A generic designation for special collections and archival materials, regardless of format, that for the purposes of Circulation Transactions are requested and tracked as an individual entity using a Call Slip or an automated request management system.

Source: Adapted from ISO 5127:2001 2.1.13, Archival Unit: "item single document (1.2.02) or set (1.1.1.03) of documents in an archives (2) (3.1.02), treated as an entity." Compare ANSI/NISO Z39.7-2013, 4 Volume: "A single physical unit of any printed, typewritten, handwritten, mimeographed, or processed work, distinguished from other units by a separate binding, encasement, portfolio, or other clear distinction, which has been cataloged, classified, and made ready for use, and which is typically the unit used to charge circulation transactions."

Related terms: Circulation Transaction; Call Slip; archival unit; volume; container; item; piece

Comment: For the purpose of measuring collection use, a generic term is needed to denote the various ways that repositories track and count requests for and retrievals of collection materials. Depending on the nature of the materials and their cataloging and housing, a Collection Unit may represent a single volume or multi-volume set, a single map or portfolio of maps, an archival box or a folder, a videotape or audiocassette, CD/ROM or DVD, etc. Formulating a generic designation allows repositories to perform circulation transactions and statistical counts in ways that are most sensible and practical locally, without attempting to require all institutions to count transactions in precisely the same way (e.g., not requiring all archival repositories to count circulation transactions at the box level only rather than at the folder level, which would require some repositories to change circulation practices).

Event

A pre-arranged activity with cultural, educational, social, political, scholarly, or other intent, such as instructional sessions, tours, lectures, concerts, and other programs hosted by the Repository.

Source: Adapted from ISO 2789:2013, 2.2.9 Event, and ISO 16439:2014, 3.22 Event: "pre-arranged activity with cultural, educational, social, political, scholarly, or other intent, e.g., exhibitions, author visits, literary discussions, workshops, etc." Compare ANSI/NISO Z39.7-2013, 7.8.3 Information Services to Groups: "Information contacts planned in advance in which a staff member, or a person invited by a staff member, provides information intended for a number of persons. Information service to groups may be either bibliographic instruction or library use presentations, or it may be cultural, recreational, or educational presentations. Story hours are included. Presentations both on and off the library premises are included as long as the library sponsors them. Meetings sponsored by other groups using library meeting rooms are not included."

Synonyms: program

Related terms: Exhibition

Comment: The following Notes from ISO 16439:2014, 3.22 Event, were considered in formulating guidelines for measures and metrics pertaining to Events hosted by a Repository. Note 1 to entry: "Only events arranged by the library on its own or in partnership with other institutions are included, whether inside or outside the library premises. Events inside the library premises organized by institutions outside the library without the library's cooperation are excluded." Note 2 to entry: "User training lessons and library tours are excluded." Note 3 to entry: "Ongoing programs are included. Each session of a program is counted as one event." Note 4 to entry: "Virtual events are included."

Exhibition

A time-limited public display of a collection of objects, organized or co-organized by a Repository, that have been selected and ordered so that their interaction demonstrates an idea or theme for cultural or educational purposes.

Source: Adapted from ODLIS, Exhibition: "A collection of objects shown or displayed in a public place. Also, the act of displaying a collection of objects publicly" and ISO 2789:2013, 2.2.10 Exhibition: "time-limited display of objects, organized or co-organized by the library." Compare ANSI/NISO Z39.7-2013, 3.1.16 Exhibition: "assembly of artistic, historical, scientific or technical documents (1.2.02) through which visitors move in a planned sequence based on educational intention or aesthetics." Note 1 to entry: "Exhibitions can take place inside or outside the library premises." See also SAA Glossary, Exhibition (1): "An organized display of materials" and accompanying Note: "An exhibition generally includes materials such as artworks, documents, or objects that have been selected and ordered so that their interaction demonstrates an idea or theme for cultural or educational purposes."

Synonyms: exhibit, display

Related terms: Event

Comment: The following Notes from ISO 16439:2014, 3.22 Event, were also considered in formulating guidelines for measures and metrics pertaining to Exhibitions, including online Exhibitions. Note 1 to entry: "Only events arranged by the library on its own or in partnership with other institutions are included, whether inside or outside the library premises. Events inside the library premises organized by institutions outside the library without the library's cooperation are excluded." Note 2 to entry: "User training lessons and library tours are excluded." Note 3 to entry: "Ongoing programs are included. Each session of a program is counted as one event." Note 4 to entry: "Virtual events are included."

Interlibrary Loan Request

A request made by a Repository on behalf of an affiliated User to temporarily borrow or reproduce material held by another Repository to facilitate access for research purposes.

Source: Adapted from the Interlibrary Loan Code of the United States, Definitions 1.1: "Interlibrary loan is the process by which a library requests material from, or supplies material to, another library."

Synonyms:

Related terms: ILL, resource sharing, document delivery, borrowing, lending, exhibition loan

Comment: Additional definitions and best practices for the interinstitutional loan of archival and special collections materials may be found in the "ACRL/RBMS Guidelines For Interlibrary And Exhibition Loan Of Special Collections Materials," approved by the Association of College and Research Libraries, a division of the American Library Association, in 2012, and endorsed by the Society of American Archivists in 2013. Interinstitutional loans of archival and special collections materials to facilitate research access are distinct from loans to support Exhibitions. A loan request for research access may be fulfilled by temporary transfer of the original material or by its reproduction and transmission through a document delivery service. Reproductions delivered in this manner by repositories on behalf of their Users are distinct from reproductions requested directly by Users.

Page Views

The successful loading of any document containing content that was requested by a Web site visitor.

Source: Adapted from Eric T. Peterson, *Web Analytics Demystified: A Marketer's Guide to Understanding How Your Web Site Affects Your Business* (Portland, OR: Celilo Group Media, 2004), p. 48: "A page view is counted with the successful loading of any document containing content that was requested by a Web site visitor, regardless of the mechanism of delivery or number and frequency with which said content is requested." Compare Web Analytics Definitions, which defines Page as "an analyst-definable unit of content" and Page Views as "The number of times a page (an analyst-definable unit of content) was viewed." The Web

Analytics Definition definitions recognize that the criteria for counting Pages and Page Views depends upon the software agent used to access and record them; see Comment below.

Synonyms:

Related terms: page, session

Comment: According to Web Analytics Definitions, Page Views, p. 7: “Most web analytics tools allow the client to specify what types of files or requests qualify as a “page. Certain technologies including (but not limited to) Flash, AJAX, media files, downloads, documents, and PDFs do not follow the typical page paradigm but may be definable as pages in specific tools. Content, such as XML feeds (RSS or Atom) and emails that can be delivered to both web browsers and non-browser clients are not typically counted as page views because the request or receipt of the content does not always correspond to the content being displayed.”

Reading Room

A secure space or area provided for Users to consult a Repository’s holdings.

Source: Adapted from SAA Glossary, Reading Room: “A secure space area designed for patrons to work with a Repository’s holdings.” Compare ISO 5127:2001, 5.3.05 Reading Room: “space provided for the consultation of documents (1.2.02), usually combined with a reference collection (3.1.11) within an information (1) (1.1.3.08) and documentation (1.2.01) organization.”

Synonyms: reference room, research room, search room

Related terms: Reading Room Visit

Comment: In this document, definitions, measures, and metrics pertaining to Reading Rooms and Reading Room Visits were formulated for physical Reading Room environments, but they may also be adapted to online or virtualized Reading Room environments.

Reading Room Visit

An in-person visit by a Registered User to a Reading Room to work with a Repository’s holdings.

Source: Based on ISO 2789:2013, 2.2.40 Visit: “person (individual) entering the library premises.”

Related terms: Visit

Comment: The following definition from ISO Z39.7-2013, 7.1 Gate Count, was considered in formulating guidelines for measures and metrics pertaining to Reading Room Visits: “The total number of persons who enter the library. The total number includes persons who visit in groups and persons who visit for library-sponsored programs. A person may be counted more than once. Counting may be done upon entrance or upon exit.” In this document, definitions, measures, and metrics pertaining to Reading Rooms and Reading Room Visits were formulated for physical

Reading Room environments, but they may also be adapted to online or virtualized Reading Room environments.

Reference Question

A request from a Repository User for assistance in locating specific information or in using Repository resources in general, made in person, by telephone, or electronically.

Source: Adapted from ANSI/NISO Z39.7:2013, 7.3 Information Request: “A request from a library user for assistance in locating specific information or in using library resources in general, made in person, by telephone, or electronically.” Compare ISO 2789:2013, 2.2.26 Reference Question: “information contact that involves the knowledge or use of one or more information sources (such as printed and non-printed materials, machine-readable databases, the library's own and other institutions' catalogues) by library staff.” See also ODLIS, Reference Question: “A request from a library user for assistance in locating specific information or in using library resources in general, made in person, by telephone, or electronically.”

Synonyms: information request

Related terms: Reference Transaction

Comment: The Notes from ISO 2789:2013, 2.2.26 Reference Question, were considered in formulating guidelines for measures and metrics pertaining to Reference Transactions. In particular, Note 3 to entry: “One reference question may address several issues.” Note 4 to entry: “The question can be delivered personally or by means of telephone, regular mail, fax or electronic media (via email, the library website or other networked communications mechanisms).” Note 5 to entry: “It is essential that libraries do not include informational (directional and administrative) questions, e.g. for locating staff or facilities, regarding opening times or about handling equipment such as printers or computer terminals (see 2.2.13).”

Reference Transaction

An information contact that involves the knowledge, use, commendation, interpretation, or instruction in the use of one or more information sources by a member of the Repository staff.

Source: Adapted from NISO Z39.7:2013, 7.3: “A reference transaction is an information contact that involves the knowledge, use, commendation, interpretation, or instruction in the use of one or more information sources by a member of the library staff. Information sources include printed and non-printed materials, machine-readable databases (including assistance with computer searching), catalogs and other holdings records, and, through communication or referral, other libraries and institutions, and persons both inside and outside the library.” Compare IMLS Public Libraries in the United States Survey, Reference Transactions: “information consultations in which library staff recommend, interpret, evaluate, and/or use information resources to help others to meet particular information needs. A reference

transaction includes information and referral service as well as unscheduled individual instruction and assistance in using information sources (including web sites and computer-assisted." Compare also ISO 2789:2013, 2.2.27 Reference Service: "provision of information and assistance, in response to requests, by an information and documentation organization" (source: ISO 5127:2001, 5.5.06).

Synonyms: program

Related terms: Virtual Reference Transaction, reference service

Comment: See also the Instructions for the ACRL 2014-15 Academic Library Trends and Statistics Survey, Information Services to Individuals (lines 66 and 67): "Transactions and consultation interactions are information contacts that involve the knowledge, use, recommendations, interpretation, or instruction in the use of one or more information sources by a member of the library staff. Information sources include printed and non-printed materials, machine-readable databases (including assistance with computer searching), the library's own catalogs and other holdings records, other libraries and institutions through communication or referral, and persons both inside and outside the library."

Registered User

A person who has applied for and received permission to gain access to Repository materials in accordance with its policies.

Source: Adapted from IMLS Public Libraries in the United States Survey: "A registered user is a library user who has applied for and received an identification number or card from the public library that has established conditions under which the user may borrow library materials or gain access to other library resources." Compare ISO 2789:2013 2.2.28, Registered User: "person or organization registered with a library in order to use its collection and/or services within or away from the library."

Synonyms:

Related terms: User, patron, reader, researcher, searcher, customer, visitor, active borrower, active user

Comment: Registration typically involves having users complete a registration form upon an initial Repository visit, the form requiring that users provide personal data, often including government-issued ID verification, contact and other demographic information, and agree to abide by a Repository's policies for reading room access and other services.

Repository

Any type of organization that holds documents, including business, institutional, and government archives, manuscript collections, libraries, museums, and historical societies, and in any form, including manuscripts, photographs, moving image and sound materials, and their electronic equivalents.

Source: Adapted from the Note to the SAA Glossary definition for Repository. The Glossary defines a Repository generically as "a place where things can be stored and maintained; a storehouse," but adds a Note explaining that the term is "used throughout this work to refer to any type of organization that holds documents, including business, institutional, and government archives, manuscript collections, libraries, museums, and historical societies, and in any form, including manuscripts, photographs, moving image and sound materials, and their electronic equivalents." Compare ODLIS, Repository: "The physical space (building, room, area) reserved for the permanent or intermediate storage of archival materials (manuscripts, rare books, government documents, papers, photographs, etc.)."

Synonyms:

Related terms: archival repository, archives, special collections library, historical society

Comment: The Multilingual Archival Terminology defines as Archival Repository as an "Agency or programme responsible for selecting, acquiring and preserving archives, making them available, and approving destruction of other records," noting that this definition is derived from ISO/IEC IS 15489-1:2001: Information and Documentation – Records Management – Part 1: General – Terms and Definitions. This definition is used as the basis for definition of Archives (2) in ISO 5127:2001, 3.1.02: "organization or part of an organization responsible for selection, acquisition (4.1.2.01), preservation (6.1.01) and availability (5.6.06) of one or more archives (1) (3.1.01)."

Reproduction

The making of a duplicate or facsimile copy, or the copy itself, of similar data on the same or a different platform.

Source: Adapted from Multilingual Archival Terminology, Reproduction (Replication): "Making of a duplicate copy of similar data on the same or a different platform," drawn from the *Glossary of Records and Information Management Terms*, 3rd ed. (ARMA International, 2007). Compare also ODLIS, Reprography: "A general term encompassing quick-service document reproduction or copying by any means except large-scale professional printing, including photography, microphotography, xerography, and photoduplication." Compare ISO 5127:2001, 2.1.03 Reproduction, "document (1.2.02) copied from and resembling another document which is recognized as being the original document (2.1.01)," and 2.1.04 Facsimile, "reproduction (2.1.03) that approximates as nearly as possible to the content, form and appearance of the original document (2.1.01), but is not necessarily of the same size." See also SAA Glossary, Reproduction (2): "duplicate made from an original; a copy."

Synonyms:

Related terms: reprography, duplication, photoduplication, facsimile

Comment: A Reproduction made involve the duplication of document in a similar format (e.g., photocopying), or conversion from one format to another (e.g., digitization), of static or time-based media.

User

An individual who uses the collections and services of a Repository from a variety of access points, both onsite and remotely.

Source: Adapted from SAA Glossary, User (1): "An individual who uses the collections and services of a repository; a patron; a reader; a researcher; a searcher" and ANSI/NISO Z39.7-2013 7.5, Library User: "an individual accessing library materials and services from a variety of access points."

Synonyms: patron, reader, researcher, searcher, customer, visitor

Related terms: Registered User

Comment: A User typically denotes an individual who is not a member of the Repository staff. Repositories may classify users in different ways, including but not limited to onsite user and remote user, registered user or visitor. To adequately describe a Repository user, distinctions should be made between user status and eligibility to access collections materials and services. In accordance with their security and other policies, repositories are responsible for determining the methods used to determine the eligibility of users and authenticating their access.

Virtual Reference Transaction

A Reference Question that is received and responded to in electronic format and conforms to Reference Transactions in that it is an information contact that involves the knowledge, use, commendation, interpretation, or instruction in the use of one or more information sources by a member of the Repository staff.

Source: Adapted from NISO Z39.7:2013, 7.3.1 Virtual Reference Transaction: "A virtual reference interaction is a question that is received and responded to in electronic format and conforms to reference interactions in that it is an information contact that involves the knowledge, use, commendation, interpretation, or instruction in the use of one or more information sources by a member of the library staff." Compare ODLIS, Digital Reference: "Reference services requested and provided over the Internet, usually via e-mail, instant messaging ('chat'), or Web-based submission forms, usually answered by librarians in the reference department of a library, sometimes by the participants in a collaborative reference system serving more than one institution."

Synonyms:

Related terms: chat reference, e-reference, online reference, real-time reference

Comment: According to NISO Z39.7:2013, 7.3.1 Virtual Reference Transaction, “Virtual reference interactions include e-mail, webform, chat, text messaging, instant messaging, or other network-based medium designed to support virtual reference.”

Visit

A person entering the Repository premises.

Source: Adapted from ISO 2789:2013, 2.2.40 Visit: “person (individual) entering the library premises.” Compare ANSI/NISO Z39.7-2013, Gate Count: “The total number of persons who physically enter the library.”

Synonyms:

Related terms: Reading Room Visit; visitor

Comment: