

**SAA-ACRL/RBMS Joint Task Force on Public Services Metrics**  
**Task Force Conference Call**  
**October 3, 2014 / 1:00-2:00PM EDT**

*Present:* Committee members: Christian Dupont, Tom Flynn, Emilie Hardman, Jessica Lacher-Feldman, Sarah Polirer, Amy Schindler, Gabriel Swift, Bruce Tabb, Elizabeth Yakel; Standards Committee liaison: John Bence

*Absent:* Moira Fitzgerald

*Note taker:* Jessica Lacher-Feldman, LSU

**I. Introduction of John Bence, new liaison to the task force from SAA's Standards Committee**

**II. Public Service Counts Discussion: "What are we doing now?" (Christian)**

Christian (Boston College): Practices: What did you gather? What would be useful in terms of measures for public services?

Tom (Winston-Salem State): We have commonalities. But what we are calling things differs. Lack of definition.

Beth (Univ of Michigan): More about "counting things" – full range of how we could things, i.e. Length of reading room stay. Do we really have the same definitions? Tracking time – with that, counts per day. How do we count what people are using in the reading room. Boxes, folders, or something else.

Bruce (Univ of Oregon): Different methods – we use various systems. How are stats being used to enhance a finding aid? What do we use the data for? Public services outcomes from stats, more description of collections, what is digitized, services.

Christian: There are goals and good examples to use stats in a real assessment manner. Develop a genre as: How we define, how we measure, and here's why.

Emilie (Harvard): What do people do now and what structures bind them? Use this to improve local services. Not much in the area of web statistics; not tied to special collections.

Jessica (LSU): Agreed with this assessment.

Sarah (Cigna): We are at the mercy of vendors. Our tool/standards... (?)

Gabriel (Princeton): Yes, especially need web data for digital collections and finding aids to count that things are used online instead of onsite.

Amy (Univ of Nebraska at Omaha): Yes, but hesitates to say we need separate measures. Larger institutions are collecting – how are they doing that with respect to special collections?

Beth: Didn't pick up on separateness – receive set of information in a way that is the best way to report it.

Christian: Web visits/Web pages. Gather stats. There is a corollary between looking at something in the reading room and looking at it online.

Gabriel: We will have this question with all of our statistics. Tiered based on what each institution can accommodate.

Christian: Need to come back around to better definitions. What is the impact of our services from a user standpoint?

### **III. Impact Stories**

Amy: Jessica shared that ARL is systematically gathering impact stories, which came out of an endorsement by the ARL Statistics and Assessment Committee and the Special Collections Task Force. Nancy Beaumont shared our nascent conversation with SAA President Kathleen Roe and Kathleen contacted Jessica and Amy. This is related to Kathleen's agenda for SAA - "The Year of Living Dangerously" – with the first step being gathering what amounts to "impact stories."

Amy posed the question to the group – have we heard the call from our own directors or deans at our institutions about this?

Jessica commented that this has only come up in the context of the question being posed – and if I have come across this in my own professional association involvement (Jessica told Dean about SAA/Kathleen).

Sarah: In business archives if resources don't have an impact on the business, then we (the archives) are gone. Feedback loop process. In a business environment, forces you to think about how collections are used. Feedback from the business perspective, not just cultural.

How is this gathered? Examples: Records that help sales people make sales; return on investment; research that supports RFPs, material that can be used in litigation, etc. by corporate archivists.

Strategic planning – our research for individuals or units in the company – twelve months later, mapping back to that original request. Time gap is detrimental to making the connection, but there is no way of shortening it. (Litigation, saving money – examples of slavery and WWII reparations).

Financial bottom line: Because we are here, we were able to get that information. What is similar in college/university archives: Nobel Prize winners, important alumni, etc.

Emilie: Impact stories are selective and anecdotal. The way that Harvard approached it, it didn't seem like it could be used in a serious way. (Utility in a serious way).

Sarah: Example: Reports to management; helping to prove the need.

Emilie: In a data-supported way.

Tom: Archives – how have we impacted student success? We are cherry picking. Did your grades improve? Numbers too hard.

Amy: Recent meeting with Vice Chancellor who is focused on assessing "whole person learning," which can include things like how are we having an impact on our student workers, etc.

Christian: Framework of conversation. What is management responding to? Utility of impact story. What is the structure? What are the elements of an impact story? Does it change over time to the community/individual? Is it quantifiable? Is it qualitative only? Is there a pattern or formula to guide their creation?

Assessment and advocacy tool.

Task force can suggest best practices.

Develop needs statements around public services. Stats to support impact stories.

Beth: Push more in quantitative way. Michigan is doing learning analytics – patterns towards broader success. Track students' interaction with repositories. Are they more likely to get an advanced degree? Can we tie our data into this other data? Show what differences our services and collections can make in undergraduate education?

Christian: Basic level – anonymous tally. Connecting individuals and services. Statistics are “persons” with touch points. Practices that are quantifiable – a dimension beyond the anonymous.

Beth: “Computational” – ensure our systems are not isolated.

#### **IV. Next Steps**

Defining Domains

We need to look at counts and the areas/domains we are counting.

One strategy could be having groups of 2-3 people to take charge of developing each domain.

Christian: possible subgroups/domains could include:

- Reading room visits
- Remote/reference inquiries
- Reproduction orders
- Interlibrary loan
- Instruction
- Web statistics

Amy: Should we set instruction aside? Group ILL/Reproduction together?

Reading room visitors; Reference interactions -- look at these at the larger level before we pull apart.

Christian: Joint task force RBMS/SAA looking at outreach and instruction is looking at quality of instruction – the actual counts/stats – our task force will take that on as a domain.

Higher conceptual level – virtual and in-person

ILL/Repro requests – same service – conceptual similarity.

Amy: Domains—existing standards, summarizing existing domains. Work on this for the next month to six weeks.

After today's meeting – sign up for areas of interest?

Gabriel: So many different domains. Would be easier to circulate a document to sign up.

Questions – reading room circulation? (?)

Christian: Can we come closer to deciding what categories might be?

- Reading room visits
- Reading room circulation
- Remote reference
- Reproduction
- Instruction/events
- Online use/website use

Amy: How are we counting onsite vs. remote? Assisting researcher as one domain?

Emilie: Not think of instruction but rather “non-reading room physical use of library”

Christian: Transaction/Virtual visit – consultation/initial visit as a concept whether virtual or in person. Capture statistics about resource apart from interaction.

Sarah: We need to think broader. For example the librarian is the researcher in corporate archives, and patrons are “customers.” We need to look at the domains and find these differences.

Beth: Number of requests and the request “door” (no matter what mode they are in) – i.e. request without archivist mediating.

Christian: In addition to the domains there is the demographic information as well.

Beth: We need to create working definitions for the domains and flesh out these domains.

Christian: Proposed a shared document to define domains and then have a conference call to discuss and solidify. Then perhaps after that we can divide up into small groups to dig deeper into each domain. How are things being counted, are there definitions already out there?

Amy: Can we propose working definitions?

Christian and Amy will begin and share with the group.

Conference call planned for the week of October 27. Doodle poll forthcoming.

## **V. Survey**

Amy: looking ahead to early 2015 what kind of survey do we want to do in advance of any standard being developed? In addition to the general population of archivists, we will probably want to target those archivists underrepresented on the task force including government, museum, and other archives. In addition to “what do you count?” what other things do we want to ask? Be thinking about this.

FYI from Christian: Joint Task force ALA conference call is an ALA meeting and must be open to any ALA member, so this was posted on ALA connect and the SAA microsite. A forum would be a different kind of event. Agenda and meeting minutes are being made available on the SAA microsite.

Meeting concluded at 2:05pm.