SAA-ACRL/RBMS Joint Task Force on Public Services Metrics
Task Force Conference Call
October 31, 2014 / 2:00-3:00PM EDT

Present: Committee members: Christian Dupont, Tom Flynn, Sarah Polirer, Amy Schindler, Gabriel Swift, Bruce Tabb, Elizabeth Yakel, Moira Fitzgerald
Absent: Jessica Lacher-Feldman, Emilie Hardman, and John Bence (Standards Committee Liaison)
Note taker: Tom Flynn

Discussion of the different domains and filling in the google doc of anything that might be missing.
https://docs.google.com/document/d/1KnJokVsKkp4Zl-SISH9668aRvovVnrjCWsWhRLI06mw/edit?usp=sharing

Users/Patrons/Customers:

- Christian: We need to define terms and refer to already created metrics and glossaries but also create new terms and measures where gaps exist.
- Amy: Apparently there is an initiative to create a glossary in the museum world.
- Beth: Started adding ISO: Z39-7 (2013 version) to the document. It is posted to SAA site under standards. Basis for the ARL metric that is online. Its definitions are used for ARL, Public Libraries and other types of libraries. Has more generality.
- Amy: What type of demographic data do we want to include? Graduated scale of data, i.e. Internal or external.
- Tom: We keep their geography to see where collections are being used to target use. Regionally in North Carolina, and by state in every other instance.
- Gabriel: Track new versus returning patrons and is done within a lifetime, not just annually. We also have the purpose of visit when a patron registers in their current version of Aeon.
- Bruce: Also keep purpose and a broad topic.
- Amy: should purpose be kept in Users or under Reference Transaction domain.
- Christian: Classes of users. Visitors (virtual or in person), service interaction, webpage users that are passive and unidentifiable. Register in person users and capture users during reference interactions. Useful to have different definitions of users to keep track of how and what is being counted. Measures can be, how many visitors did we have during the year? The metric might be, how many new users are you welcoming each year? This could show how a repository is growing.
- Moira: That type of measure and metric is being kept at Yale.
- Gabriel: Remote users create some overlap, because they contact by email and are told to register. How to include people that are both in person and virtual users or simply virtual users.
- Christian: Do we consider users and registered users and visitors would be a subset of these two top levels?
- Sarah: What is the goal of the metric? Is it the activity we want to report or the actual user? What question we want to answer will determine what we want to measure.
- Christian: Everyone reports certain numbers (users), but institutions might use a metric based on the number to demonstrate growth or other goals.

- Moira: Increase in classes but not in reading room visits. Are people experiencing this or tracking this?
- Gabriel: Classes would not be represented in the users section.
- Amy: Would be included in events. Would want to track if students were coming for a class and then coming back for an individual visit.
- Moira: To reach out to people that only visited once. Not registering students because of the volume at the desk. They sign in with the class but not fully register. Register faculty on occasion but not the students in the class.

Visits:

- Christian: Gate count description (ARL).
- Moira: Distinction to purpose of the visit.
- Beth: Create a tiered measure, Minimum, Optimal, and Platinum reporting. At a minimum we want everyone to be able to report this same measure. Is gate count an acceptable minimum?
- Moira: Would want to be able to differentiate to make arguments for staffing, but it really depends on the institution. It would be optimal to know what people are doing when they arrive, but some institutions would only really need the gate count.
- Tom: Notion of repositories counting what we know we need to count.
- Amy: Keep various types of visits into gate count, to know what people are coming into the reading room to do.
- Christian: Distinguishing registered users who actually use the collection versus just general visitors who are viewing an exhibit. Need to be clear between measures and metrics and definitions need to be flushed out.
- Gabriel: Need to provide guidance on measures like how to count length of time (lunch times and returning researchers) and days of visits in a reading room.

Events:

- Moira: Types of events: Classes, loans, exhibits, groups coming for a specific reason. Internal, external, attendance, duration and material used.
- Christian: Is the baseline to just keep a general tally?
- Gabriel: Consistent measurements are needed from year to year. Lumping events skews the data. We need granularity to differentiate type of events to make the data more meaningful. Broad categories should be used for presentation types.
- Amy: What about the different types of instruction being given?
- Gabriel: Categories of presentations. One on one instruction, outreach and class visits are important to keep, but the measures aren't always providing valuable metrics.
- Amy: We need to give guidance on what to report. What types of metrics can be done based on measures already being collected.
- Beth: Can include several use studies at the end of the final document / process. How the numbers can be used. If you do this measure, this type of metric can come from those measures (impact stories).

Collection Use/Reproductions:

- Sarah: Purpose of ILL and reproduction. What is the reason we are collecting it? Is it for budgeting? Where is the collecting data going? Details on collecting should be based on use.
- Amy: Time spent by staff on ILL transactions was added to the reference request data.
- Moira: Call number, reproduction and ILL has a large reference aspect to it. Time spent adds to the need to consider it a part of reference. Would like to count paging and transactions. It went up once, but was seen every day for 30 days and then was returned. Use is important for preservation concerns and other collection administration.
- Sarah: Also need to consider E-records.
- Amy: Website visits could be integrated into other domains or kept separate.
- Gabriel: If the website is the collection it should be considered use, but if it is the general website, it should be its own domain.
- Christian: To define: retrieval from storage, circulations, transaction, or uses.
- Tom: It is important to include online exhibits in counts.

Reference:

- Amy: This is getting beyond the gate count. What do we want to count in our interactions with customers?
- Sarah: Need to consider how granular we want to make reference requests.
- Moira: Does the patron need staff work or are they able to help themselves to the material they need.
- Christian: Z39-7 defines types of reference interactions. Virtual versus in-person reference.
- Amy: We use the same tool to track all interactions - virtual, in person, one on one, directional, etc. – with details gathered for each type of interaction, so that the data can be analyzed and reported as needed. Previously used this sort of data to help justify having students work the front desk to handle directional questions.
- Beth: Good to aggregate them. Keep virtual and others separate because we're still at a transitional place, so that we can see if there is a big shift from in person to virtual reference.

**Sign up for different domains will be conducted. Each member will sign up based on interest for 2-3 domains. Link will be sent out.