



A QUICK GUIDE TO THE

**STANDARDIZED STATISTICAL MEASURES AND METRICS FOR PUBLIC SERVICES
IN ARCHIVAL REPOSITORIES AND SPECIAL COLLECTIONS LIBRARIES**

ABOUT QUICK GUIDE

QUICK GUIDE PURPOSE:

to summarize the standards and assist with training, advocacy, and implementation planning

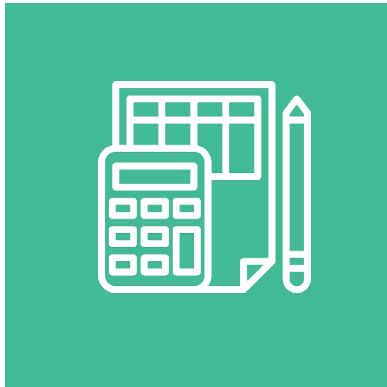
This guide:

- is intended to provide a visual summary and short descriptions of the standardized measures and metrics and it is not intended to serve as a substitute for the [full document](#).
- assumes the reader has a solid grasp on basic archival terminology, concepts, best practices, workflows, and procedures.
- is not a substitute for an internal, local, institutional-based statistics and data gathering plan and policy built on or derived from the standards.
- can be used to help you develop your own internal polices, for training, or as a quick reference.

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SUMMARY

“The purpose of this standard is to help archival repositories and special collections libraries quantify in meaningful terms the services they provide and evaluate the effectiveness and efficiency of the operations that support those services.”



MEASURE

A RESULT OF TAKING A MEASUREMENT OF A QUANTIFIABLE OBJECT OR PROCESS



METRIC

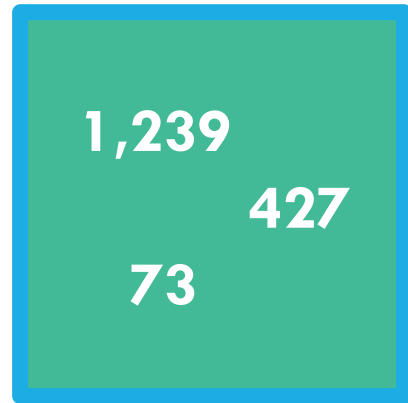
A CALCULATED RATIO BETWEEN TWO MEASURES AND/OR AN INDEPENDENT VARIABLE



DOMAIN

A DISTINCT AREA OF PUBLIC SERVICES PROVIDED BY ARCHIVAL REPOSITORIES AND SPECIAL COLLECTIONS LIBRARIES

TYPES OF MEASURES



BASIC MEASURE

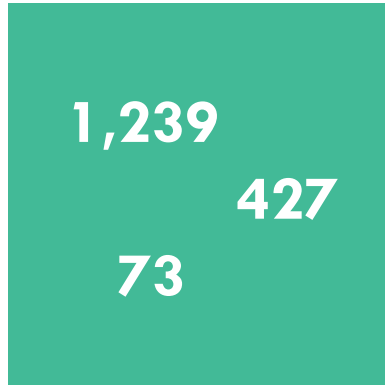
A SINGLE BASELINE
RELEVANT TO ALL
REPOSITORIES AND
LIBRARIES



ADVANCED MEASURE

ADDITIONAL OPTIONS BASED
ON LOCAL NEEDS AND
RESOURCES

TYPES OF MEASURES



COUNT = NUMBER

A NUMERICAL QUANTITY
A TOTAL OR PART OF A
WHOLE



TIME = MINUTES

DURATION,
TIME ELAPSED, TIME SPENT,
CUMULATIVE AMOUNT OF TIME



LIST = TEXT

A UNIQUE SET OF
CATEGORIES OR CLASSIFICATIONS
BASED ON YOUR REPOSITORY

TYPES OF METRICS



**CHANGE
OVER TIME**



COMPARISON



**RATIO,
PERCENTAGE,
OR AVERAGE**



**BY DAY,
WEEK, MONTH,
QUARTER, OR
YEAR**



**GEOGRAPHIC
LOCATION**

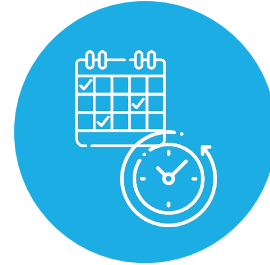
LIST OF DOMAINS



**1.0
USER
DEMOGRAPHICS**



**2.0
REFERENCE
TRANSACTIONS**



**3.0
READING ROOM
VISITS**



**4.0
COLLECTION
USE**



**5.0
EVENTS**



**6.0
INSTRUCTION**



**7.0
EXHIBITIONS**



**8.0
ONLINE
INTERACTIONS**

1.0 USER DEMOGRAPHICS MEASURES



1.1 BASIC MEASURE (“User Association”)

COUNT each unique User by Affiliation



1.2 ADVANCED MEASURE (“User Affiliation”)

LIST Classification(s) of Users’ Affiliations and Demographics



1.3 ADVANCED MEASURE (“Registered Users”)

COUNT each unique User registered/permitted to access repository

1.0 USER DEMOGRAPHICS METRICS



1.4 RECOMMENDED METRICS

- “Internal” vs. “External” Users
- Users by Affiliation
- Users by Geographic Location
- Unique Users by month/year
- Newly Registered Users by month/year
- Returning Users by month/year

2.0 REFERENCE TRANSACTIONS MEASURES



2.1 BASIC MEASURE (“Reference Questions”)

COUNT of reference questions received from Users



2.2 ADVANCED MEASURE (“Question Method”)

LIST categories of methods by which questions are received



2.3 ADVANCED MEASURE (“Time Spent Responding”)

TIME spent by staff managing and responding to questions



2.4 ADVANCED MEASURE (“Question Purpose”)

LIST categories for purpose, subject, service type (by rubric)



2.5 ADVANCED MEASURE (“Question Complexity”)

LIST categories of complexity (by rubric scale, i.e. READ scale)

2.0 REFERENCE TRANSACTIONS METRICS



2.6 RECOMMENDED METRICS

- ❑ Total number of Reference Questions received per week/month/year
- ❑ Total number of Reference Questions received per week/month/year via each method
- ❑ Average number of minutes spent responding to Reference Questions
- ❑ Average number of minutes spent responding to internal vs. external users
- ❑ Ratio of time spent responding to Reference Questions to time Users spend in the Reading Room
- ❑ Ratio of Reference Questions submitted by each User demographic category

3.0 READING ROOM VISITS MEASURES



3.1 BASIC MEASURE (“User Days”)

COUNT number of Reading Room visits (one per day per User)



3.2 ADVANCED MEASURE (“User Hours”)

TIME spent at each visit, cumulative

3.0 READING ROOM VISITS METRICS



3.3 RECOMMENDED METRICS

- Total Reading Room Visits per day
- Average number of Reading Room Visits per day
- Average number of Reading Room Visits per unique Registered User
- Total User Hours per day
- Average Reading Room Visit Length



4.0 COLLECTION USE MEASURES 4.1 - 4.4



4.1 BASIC MEASURE (“All Checkouts”)

COUNT checkouts of Collection Units for any use



4.2 ADVANCED MEASURE (“Reading Room Use”)

COUNT checkouts for Registered Users in the Reading Room only



4.3 ADVANCED MEASURE (“Usage Hours”)

TIME each Collection Unit is checked out to a Registered User, cumulative



4.4 ADVANCED MEASURE (“Reference Use”)

COUNT checkouts to STAFF for responding to reference questions



4.0 COLLECTION USE MEASURES 4.5 - 4.9

1,239
427
73

4.5 ADVANCED MEASURE (“Exhibition Use”)

COUNT checkouts of Collection Units

1,239
427
73

4.6 ADVANCED MEASURE (“Instructional Use”)

COUNT checkouts of Collection Units

1,239
427
73

4.7 ADVANCED MEASURE (“Operational Use”)

COUNT checkouts of Collection Units



4.8 ADVANCED MEASURE (“Purpose of Use”)

LIST categories for why Users use the collections (by rubric)

1,239
427
73

4.9 ADVANCED MEASURE (“Publication Use”)

COUNT citations in publications, books, journals, documentaries, etc.

4.0 COLLECTION USE MEASURES 4.10 - 4.13



1,239
73 427

4.10 ADVANCED MEASURE (“Reproduction Requests”)

COUNT number of reproduction requests

1,239
73 427

4.11 ADVANCED MEASURE (“Reproductions Made”)

COUNT number of reproductions made (total files or copies)

1,239
73 427

4.12 ADVANCED MEASURE (“ILL Requests Received”)

COUNT number of Interlibrary Loan requests received

1,239
73 427

4.13 ADVANCED MEASURE (“ILL Requests Filled”)

COUNT number of Interlibrary Loan requests completed

4.0 COLLECTION USE METRICS



4.14 RECOMMENDED METRICS

- Total Collection Units checked out per day/week/month/year
- Average number of Collection Units checked out per day/week/month/year
- Total Usage Hours per day
- Average use time per Collection Unit
- Total number of times unique Collection Units are consulted
- Ratio of unique Users per Collection Unit
- Ratio of Reproduction Requests to Reading Room visits
- Total Reproductions per day/week/month/year
- Average number of Reproductions per day/week/month/year
- Average number of Reproductions per User
- Total number of ILL Requests received or filled per day/week/month/year
- Ratio of ILL Requests



5.0 EVENTS MEASURES



5.1 BASIC MEASURE (“Number of Events”)

COUNT total number of all events



5.2 ADVANCED MEASURE (“Event Attendees”)

COUNT number of individuals who attend each event



5.3 ADVANCED MEASURE (“Length of Event”)

TIME of total duration of each event



5.4 ADVANCED MEASURE (“Type of Event”)

LIST categories of events



5.5 ADVANCED MEASURE (“Event Preparation Time”)

TIME spent by all staff preparing for and hosting each event

5.0 EVENTS METRICS



5.6 RECOMMENDED METRICS

- Total Events per month/year
- Average number of Events per month/year
- Average number of attendees per Event
- Average preparation time per Event
- Preparation time per attendee



6.0 INSTRUCTION MEASURES



6.1 BASIC MEASURE (“Number of Sessions”)

COUNT number of Instruction Sessions



6.2 ADVANCED MEASURE (“Number of Students”)

COUNT number of students who attend each Instruction Session



6.3 ADVANCED MEASURE (“Level of Students”)

LIST instructional levels of students who attend each Instructional Session



6.4 ADVANCED MEASURE (“Instruction Session Duration”)

TIME total duration of each Instruction Session



6.5 ADVANCED MEASURE (“Session Preparation Time”)

TIME spent by all staff preparing and presenting each Instruction Session

6.0 INSTRUCTION METRICS



6.6 RECOMMENDED METRICS

- Total Instruction Sessions per week/month/year
- Average number of Instruction Sessions per week/month/year
- Average number of Collection Units used per Instruction Session
- Average number of students per Instruction Session
- Average preparation time per Instruction Session
- Average preparation time per student



7.0 EXHIBITIONS MEASURES 7.1 - 7.4

1,239
427
73

7.1 BASIC MEASURE (“Number of Exhibitions”)

COUNT number of physical Exhibitions

1,239
427
73

7.2 ADVANCED MEASURE (“Exhibition Visitors”)

COUNT number of individuals who visit each Exhibition



7.3 ADVANCED MEASURE (“Exhibition Types”)

LIST all types of Exhibitions by category



7.4 ADVANCED MEASURE (“Exhibition Duration”)

TIME each Exhibition available for viewing, cumulative

7.0 EXHIBITIONS MEASURES 7.5 - 7.7



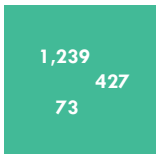
7.5 ADVANCED MEASURE (“Exhibition Preparation Time”)

TIME spent by all staff preparing each Exhibition



7.6 ADVANCED MEASURE (“Exhibition Publications”)

COUNT number of publications per exhibition and quantity produced



7.7 ADVANCED MEASURE (“Exhibition Promotions”)

COUNT all types of promotions (social media posts, press releases, etc.)

7.0 EXHIBITIONS METRICS



7.8 RECOMMENDED METRICS

- Total number of Exhibitions per year or other relevant time period
- Total Exhibit visitors per year
- Total visits per Exhibition
- Average number of Exhibit visitors per month/year
- Average number of visitors per Exhibition
- Average number of visitors per hour

8.0 ONLINE INTERACTIONS MEASURES 8.1 - 8.4



1,239
427
73

8.1 BASIC MEASURE (“Page Views”)

COUNT total number of page views by Users

1,239
427
73

8.2 ADVANCED MEASURE (“Unique Page Views”)

COUNT total number of unique page views by Users

1,239
427
73

8.3 ADVANCED MEASURE (“Sessions”)

COUNT number of sessions initiated



8.4 ADVANCED MEASURE (“Session Duration”)

TIME spent on each site per session by a User

8.0 ONLINE INTERACTIONS MEASURES 8.5 - 8.8



1,239
427
73

8.5 ADVANCED MEASURE (“Downloads”)

COUNT number of files downloaded from content posted to website(s)



8.6 ADVANCED MEASURE (“Download File Type”)

LIST of digital object types and file formats downloaded

1,239
427
73

8.7 ADVANCED MEASURE (“Traffic Source”)

COUNT each source from which online traffic is directed

1,239
427
73

8.8 ADVANCED MEASURE (“Social Media Reach”)

COUNT total number of interactions with social media

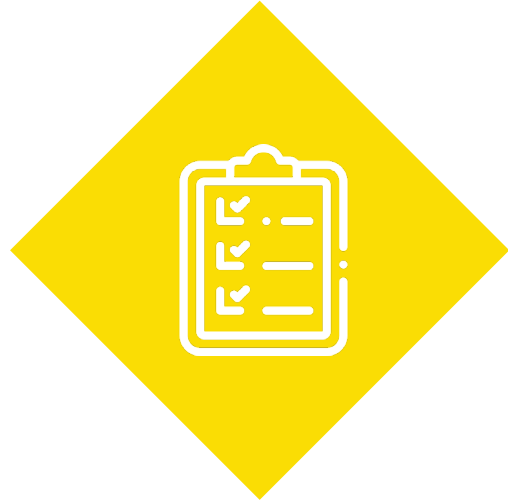
8.0 ONLINE INTERACTIONS METRICS



8.9 RECOMMENDED METRICS

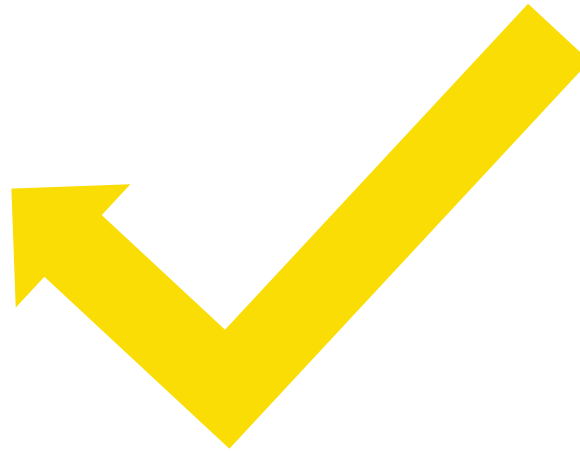
- Total Page Views per day/week/month/year
- Total session per day/week/month/year
- Total session duration per day/week/month/year
- Average session duration per day/week/month/year
- Page Views per session
- Total file downloads per day/week/month/year

YOUR INSTITUTIONAL PLAN



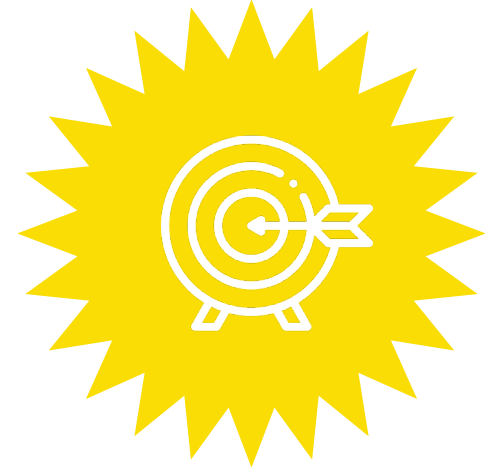
LOCAL CATEGORIES

YOUR LISTS
ACCORDING TO
YOUR INSTITUTIONAL NEEDS



LOCAL CRITERIA

YOUR SERVICES
YOUR PATRONS/USERS
YOUR COLLECTIONS
YOUR FACILITIES



LOCAL PRIORITIES

YOUR SERVICE GOALS
USER NEEDS ASSESSMENT
ADVOCACY
CULTURE/ENVIRONMENT

SUGGESTIONS FOR NEXT STEPS

HOW TO GET STARTED USING THE STATISTICAL MEASURES AND METRICS

- Set an achievable goal (i.e. try to meet all basic measures according to recommended guidelines)
- Compare each of the measures to current practice
 - What are you doing/not already doing?
 - Which measures apply to you?
 - What do you want to know about your services and processes?
- Make things work with the system you have available.
- Be open to revising long-standing practices.
- Consider assessment goals when choosing which standards will work best for you.
- Use as an opportunity to create a culture of gathering and using statistics.
- Improvement is always good - do better than what you're doing now.

HOW TO START USING YOUR GATHERED DATA

- Collect at least 2-3 years of data before you start making substantive changes.
- Figure out what your statistics actually tell you.
- Work backward by deciding which critical issues need to be resolved, then figure out which data you need to make an informed decision.
- Consider the audience - what do those asking for data really need to know?

HOW TO START ADVOCATING WITH YOUR DATA

- Collect 4-5 years of data before analyzing larger trends and making major strategic changes.
- Choose a set of measures and metrics that align with your institutional strategic plan(s).
- Answer "big picture" questions and focus on continuous improvement.
- Choose simple visualizations that "tell your story" and highlight your strengths.



DEVELOPED BY:
ASSESSMENT OF MEASURES & METRICS FOR PUBLIC SERVICES SUB-COMMITTEE
REFERENCE, ACCESS, AND OUTREACH SECTION, 2020-2021
SOCIETY OF AMERICAN ARCHIVISTS

Chair: Jay-Marie Bravent, University of Kentucky, 2017-2021

Sub-Committee Volunteers: Jeanie Fisher, Seattle Municipal Archives; Melanie Griffin, University of Arkansas; Amanda Hawk, Louisiana State University; Tyson Koenig, Southeast Missouri State University; Susan McElrath, University of California-Berkeley

Past Co-Chair(s): Amanda Pellerin, Georgia Institute of Technology, 2017-2019