

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

### **ALA Annual Conference 2017, Chicago, IL**

Sunday, June 25, 1:00-2:30 p.m.

Location: McCormick Place West, W186a

**Members present:** Christian Dupont, ACRL/RBMS co-chair (Boston College), Moira Fitzgerald (Yale University)

**Members who could not attend:** Amy Schindler, SAA co-chair (University of Nebraska at Omaha), Tom Flynn (Winston-Salem State University), Emilie Hardman (Harvard University), Brenda McClurkin (University of Texas at Arlington), Sarah Polirer (Cigna Corporation), Gabriel Swift (Princeton), Bruce Tabb (University of Oregon), Elizabeth Yakel (University of Michigan)

**Visitors:** Sara Logue (Princeton University), Anne Mar (Occidental College), Kevin Ford (Atlas Systems), Milagro Hernandez (University of Texas, Rio Grande Valley), Jesus Resendez (University of Texas, Rio Grande Valley), Tim Johnson (University of Minnesota), Charlotte Priddle (New York University), Nicholas Martin (New York University), Katie Henningson (Duke University), Robin M. Katz (University of California, Riverside), Robert Desmarais (University of Alberta), Blyne Olivieri (University of West Georgia), Mark H. Danley (United States Military Academy, West Point), Gina Costello (Louisiana State University)

### **Meeting Minutes (Draft)**

ALA co-chair Dupont convened the meeting at 1:00pm and gave a brief overview of the draft standard and review process.

A PDF version of the finalized draft was posted to [ALA Connect](#) and the [Society of American Archivists \(SAA\) website](#) on June 9. The RBMS Executive Committee has begun its review of the draft in preparation for discussion at its meeting on Monday, June 26. Once Exec has approved the draft, Dupont will forward it to the ACRL Standards Committee for review. Meanwhile, SAA task force co-chair Amy Schindler has forwarded the draft to the SAA Standards Committee for review. Once approved by the committee, it will be forwarded to SAA Council for review. The respective review processes are likely to take several months. Dupont noted that the task force will be holding a final meeting at [SAA Annual](#) (Tuesday July 25, 2017 3:00pm - 5:00pm).

Following this introduction, Dupont invited those present to introduce themselves. Dupont took the meeting notes.

Dupont and Fitzgerald invited visitors to comment or ask questions about the draft standard or share experiences or ideas for implementing it pending its approval.

Visitors expressed interest in creating a forum through which information and experiences with implementing the standard might be regularly shared. Dupont asked whether it would be helpful to create an email list, but others suggested that a Slack channel might be more useful, citing the public services channel that Melanie Meyers (Center for Jewish History) created as a good example (<https://publicserviceschat.slack.com/>). It was noted that Slack channels can also deliver email notifications if desired. Dupont said he would contact Meyers and explore options.

Other ideas included drafting a memo explaining the standard that special collections librarians and archivists might use to help inform administrators about new statistical and data collection practices based on the standard that they may implement at their repositories. Dupont mentioned that task force members have discussed creating a two-page summary version of the standard that might also be used for this purpose as well as a ready-reference guide.

Holding workshops or sessions at RBMS, SAA, and regional archives conferences could be another means of promoting awareness and adoption of the standard. Dupont noted that following some discussion task force members decided not to submit a pre-conference workshop proposal for the 2018 RBMS Conference, but would be open to working with others propose workshops at future conferences. Dupont and Hardman conducted a half-day workshop on assessment in special collections and archives at the recent [Evidenced-Based Library and Information Practice conference](#) that included a segment on public services assessment and the draft standard. They have been invited to conduct a full-day version of the workshop at the fall meeting of the [Mid-Atlantic Regional Archives Conference](#) (MARAC) in fall 2017. Other suggestions included organizing an unconference prior to the RBMS Conference or a webinar, like the [Ncompass webinar](#) that the task force hosted in February 2017, which drew more than 100 attendees. Publishing an article about the standard and case studies of its implementation could be another means of promoting and facilitating adoption, especially once the standard has been approved.

Discussion then turned to the practical aspects of statistical data collection and reporting. Kevin Ford of Atlas Systems commented that he has begun reviewing reports generated by Atlas's [Aeon](#) special collections workflow and request management system to ensure that they conform to the relevant measures and metrics defined by the standard.

The idea of conducting an annual statistical survey of special collections libraries and archival repositories was discussed. Dupont noted that while the creation of such a survey was beyond the scope of the task force, the standard was formulated to support cross-institutional surveys and statistical data collection as well as local data collection and assessment practices. Some expressed concern that a statistical survey might hurt repositories that see a relatively low volume of transactions. Others suggested that it could help identify repositories that are achieving success in their efforts to promote use of their collections and services and establish shared best practices. It could also offer insights into the general "state of health" of archives and special collections, like the [Heritage Health Index report](#). Survey reports could group results by institutional peer categories and include metrics like the ratio of usage to staffing and collection sizes. Dupont indicated that he and SAA task force co-chair Amy Schindler will suggest and investigate possibilities for having SAA and ACRL/RBMS collaborate on the creation of

statistical survey and data repositories as they shepherd the standard through the approval process.

There being no further discussion, Dupont adjourned the meeting at 2:00pm.