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

ALA Midwinter Conference 2015, Chicago, IL
Sunday, February 1, 1:00-2:30 p.m.
Swissôtel - Montreux Room

Members present: Christian Dupont, ACRL/RBMS co-chair (Boston College), Amy Schindler, SAA co-chair (University of Nebraska, Omaha), Moira Fitzgerald (Yale University), Emily Hardman (Harvard University), Gabriel Swift (Princeton University), Bruce Tabb (University of Oregon)

Members who joined via Skype: Tom Flynn (Winston-Salem State University), Jessica Lacher-Feldman (Louisiana State University), Sarah Polirer (Cigna Corporation), Beth Yakel (University of Michigan)

Visitors: Sarah Allison (New Mexico State University), Kate Hutchens (University of Michigan), Shannon Supple (University of California, Berkeley), Kat Timms (Library and Archives Canada), Deborah Whiteman (University of Toronto).

Meeting Minutes

I. Welcome and introductions

Amy Schindler convened the meeting at 1:05pm and facilitated a round of introductions. All task force members were present either in person or via Skype. Five visitors also attended the meeting in person.

Christian Dupont noted that the Skype kit that had been requested for the meeting from ALA was not delivered to the room. He was, however, able to use his own laptop and the PA system in the room to enable the four task force members who could not be present in person to participate in the meeting via Skype. Dupont noted that no non-members had requested Skype access prior to the meeting (an invitation to contact him about meeting access had been included in the agenda that was circulated in advance via the task force mailing list, the RBMS discussion list, and ALA Connect).

II. Approval of agenda and appointment of recorder

The agenda was approved and Gabriel Swift volunteered to serve as recorder.

III. Discussion of progress on the <u>"domains" documents</u> covering the areas of public services statistics to be addressed by the standards development

Schindler recapped the seven functional "domains" of archives and special collections management that had been previously identified by the task force as areas for which the task force should develop standardized statistical measures. In November, task force members were divided into subgroups to work on each domain, following an outline of questions posted to the task force's Google Drive site. The domains covered by the task force include:

1. Users/Customers
2. Visits
3. Collections Use
4. Events/Activities
5. Reference Transactions
6. Reproductions & Interlibrary Loan
7. Website

As agreed upon prior to the meeting, Schindler facilitated a discussion of the progress made by the three domain subgroups that had been most active to date:

a. Reproductions & Interlibrary Loan Domain
   Bruce Tabb, the convener of this group, reported that the group has focused on answering questions on what statistics we collect and how we collect them. A spreadsheet of statistics to record was created and standard terms were identified. Definitions were gathered from *ANSI/NISO Z39.7-2013*, the *Glossary of Archival and Records Terminology*, and the *Dictionary for Library and Information Science*.

b. Website Domain
   Amy Schindler reported that the group has worked on identifying and defining standard terms, such as page views, links clicked, stickiness, downloads, unique page views, and unique visitors. Standard resources such as NISO and the Standardized Usage Statistics Harvesting Initiative (SUSHI) have been consulted, though definitions have been influenced by website dictionaries and resources beyond libraries and archives. Major topics of discussion have included: "What are repositories able to document?" and "What technical levels/skills do institutions have that can be applied as a broad standard?" The subgroup has also considered whether website statistics should be included in other domains, for example reproductions requests that generate from online resources and digitized library material? Beth Yakel has researched and generated a bibliography of web analytic books to identify concepts we might want to track.

c. User/Customer Domain

Convener Emily Hardman reported that as with the other domains, the group has focused on key terms and definitions which have been compiled from several sources, including *ANSI/NISO*, the *Society of American Archivists Glossary*, and the *ACRL/RBMS Guidelines Regarding Security and Theft in Special Collections*. Discussions regarding the definition of a user have focused on how patrons interact with the institution and its holdings: in-person researcher, online only, exhibition visit, event participation, etc.

Open discussion among task force members

Following the reports from the three subgroups, task force members engaged in general discussion.

Dupont suggested that at this point that task force can address questions and concerns. For example, what is working and what is not working in our approach so far? Should broad terms, such as 'visitor' or 'user,' be defined once and then applied across all or multiple domains?

Sarah Polirer noted that the library community already has standards and annual reporting functions. How closely should our task force work be tied into these preexisting standards? Are we creating standards to be used in the generation of statistical surveys? Are we addressing statistical tools or resources?

Dupont responded that the task force charge is limited to creating the statistical standard, not the survey or other tools that might be based on it. Nevertheless, we could certainly develop the standard in such a way as to facilitate the creation of a survey instrument and data warehouse that could be mined for cross-institutional statistics.

Schindler remarked on the annual statistical surveys of research and college libraries conducted by ARL and ACRL. She suggested reaching out in the archives community to see whether SAA's Museum Archives Section or Public Library Archives/Special Collections Roundtable might be interested in our efforts and help to broaden their application. COSA might also be interested in benchmarking and conducting statistical surveys of archives since it represents state government archives that must document the need for budgetary support.

Polirer and Hardman noted that as we work on our domains, feedback from others is important. What are people doing now with regard to collecting statistics in various institutions?

Schindler commented that conducting a survey of SAA and ACRL/RBMS was discussed in our previous task-force meeting. Should we pursue the idea? General agreement was voiced that a survey should be conducted and circulated widely to special collections and archives, including a broad range of institutions (corporate, government, and museum archives, etc.).

Questions/suggestions from visitors

Dupont turned to visitors at the meeting to ask what questions or suggestions they might have regarding the task force's work.

A suggestion was made regarding surveys: based on experience working with SPEC Kit, the proposed survey should have specific questions so that responses are not too diverse to quantify or define.

Another visitor noted that one resource that could serve as a model is *Taking Our Pulse: The OCLC Research Survey of Special Collections and Archives*.

It was suggested that the survey ask what statistics institutions are recording now, not what they hope to record in the future or have recorded in the past. Ideally, the data collected should fit within ARL requirements but also meet the needs of special collections.

Moira Fitzgerald remarked that the Beinecke Library is collecting a lot of public services/web data that is not included in the annual ARL statistical survey, which focuses on different metrics. How do we satisfy both the larger institutional needs (ARL statistics) and our own special collections needs?

From his conversation with ARL staff, Dupont reported that ARL is not interested in adding more questions to its annual statistical surveys but would like the archives and special collections communities to develop their own surveys to meet their needs.

Schindler remarked that at the University of Nebraska at Omaha, she collects data that is included in the statistics for the larger library, but observed, like Fitzgerald, that her departments collects more detailed statistics for archives & special collections and should continue doing so. She also noted that ARL has been soliciting "impact stories" as a qualitative assessment approach to understanding and promoting the value of archives & special collections.

A visitor asked whether teaching and pedagogy is a domain that that the task force is working on. Dupont responded that defining counts for instructional sessions is one of the statistics that activities/events domain will address. He also noted that a new joint SAA-ACRL/RBMS task is being formed to develop guidelines for primary source literacy. The new task force will focus on how primary source literacy can be effectively taught rather than defining how instructional sessions should be counted statistically, which falls to our task force.

How should the task force move forward?

Task force members next turned a discussion of how the task force should carry its work forward, particular with respect to the domains documents.

Gabriel Swift recommended that the task force draft a goals document including a project timeline, next steps, and milestones for the both the domains and overall committee work.

Schindler asked whether as part of such a schedule, task force members should all work together on one domain document at a time in short sprints rather than continuing our current approach of having each domain subgroup work in parallel. General agreement favored turning to the "spring" approach.

Dupont asked what order should be followed in scheduling the sprints. Consensus favored beginning with the broadest domains (Users, Collections, and Visits). It was noted that the order of domains in the domains sign-up document (the same as listed above) would work well.

Next steps

Further discussion among task force members led to the following plan of work:

Sprints
- The first sprint will begin two weeks after ALA Midwinter; co-chairs will send out notices and instructions.
- The two-week sprints will continue through ALA Annual in June, at which point progress will be re-assessed.
- All task force members will be expected to contribute to work on the domain during the two-week sprint, after which the domain convener and co-chairs will review and edit input.

Survey
- Begin survey discussion in next committee call or via email.
- Ask for volunteers or assign members to a Survey Group.

  Questions to resolve: Tabb asked how work on the survey will relate to the two-week sprints. Dupont asked how and when we will conduct the survey. Amy: Tiers of collecting based on resources. Potentially coordinate survey or at least its timing with our sister joint task force.

Next meetings

ALA Annual 2015 (San Francisco, June 26-30): The meeting time and room is still being scheduled. There will be no official meeting or task force activity at the RBMS Conference in Oakland.

SAA Annual 2015 (Cleveland, August 16-22): In addition to a regular task force meeting, Schindler is working with SAA staff to hold an informal brown bag lunch session so that representatives of all three joint SAA-ACRL/RBMS standards/guidelines development task forces share and discuss their work with interested Annual Meeting attendees.

ALA Midwinter 2016 (Boston, January 8-12, 2016): The task force should consider scheduling a separate public forum for discussion of a draft standards document or having its regular meeting function as such.

ALA Annual 2016 (Orlando, June 23-28, 2016) and SAA Annual 2016 (Atlanta, July 31-August 6, 2016): The task force should be ready to hold additional forums to finalize draft documents and prepare them for submission to the ACRL and SAA standards committee for review.

Other business

Dupont noted that a call to ACRL-RBMS members to submit self-nominations serve on the new SAA-ACRL/RBMS Joint Task Force on the Development of Guidelines for Primary Source Literacy was posted to the RBMS discussion list on January 14. The deadline for nominations is February 19. SAA has not yet announced when and how SAA members will be able to volunteer to serve.

Schindler reported that she will be following up with members of the SAA Dictionary Working Group to ask whether they are using NISO standards as a source for definitions and what kind of mapping our task force might attempt to bring archives and library definitions for terms used in common into alignment.

IV. Joint meeting with the Joint Task Force on the Development of Standardized Holdings Counts and Measures for Archival Repositories and Special Collections Libraries

The Holdings Counts task force was invited to join our discussion at 2:10pm, but declined to do so as they were working intensively. This allowed more time for the above discussions.

V. Adjournment

The meeting was adjourned at 2:30 p.m.