**A QUICK GUIDE TEXTUAL SUMMARY**

**of the
STANDARDIZED STATISTICAL MEASURES AND METRICS FOR PUBLIC SERVICES**

**IN ARCHIVAL REPOSITORIES AND SPECIAL COLLECTIONS LIBRARIES**

This guide:

* is intended to provide a textual summary and short descriptions of the standardized measures and metrics; it is not intended to serve as a substitute for the [full document](https://www2.archivists.org/sites/all/files/Standardized%20Statistical%20Measures%20and%20Metrics%20for%20Public%20Services%20in%20Archival%20Repositories%20and%20Special%20Collections%20Libraries_011718_0.pdf).
* 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.

**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.”

**DEFINTIONS**

**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 -** A single baseline relevant to all repositories and libraries

**ADVANCED -** Additional Options based on local needs and resources

**COUNT = NUMBER**
A numerical quantity

A total or part of a whole

**TIME = MINUTES**
Duration
Time Elapsed

Time Spent
A 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 Average

By Day

By Week

By Month

By Quarter

By 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**

**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

**1.4 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**

**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)

**2.6 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**

**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

**3.3 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**

**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

4.5 Advanced measure (“Exhibition Use”)

 **COUNT** checkouts of Collection Units

4.6 Advanced measure (“Instructional Use”)

 **COUNT** checkouts of Collection Units

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)

4.9 Advanced measure (“Publication Use”)

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

4.10 Advanced measure (“Reproduction Requests”)

 **COUNT** number of reproduction requests

4.11 Advanced measure (“Reproductions Made”)

 **COUNT** number of reproductions made (total files or copies)

4.12 Advanced measure (“Interlibrary Loan Requests Received”)

 **COUNT** number of Interlibrary Loan requests received

4.13 Advanced measure (“Interlibrary Loan Requests Filled”)

 **COUNT** number of Interlibrary Loan requests completed

**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 Interlibrary Loan Requests received or filled per day/week/month/year
* Ratio of Interlibrary Loan Requests filled to received

**5.0 EVENTS**

**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

**5.6 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**

**6.1 Basic measure (“Number of Instruction 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 (“Instructional 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 (“Instruction Session Preparation Time”)

 **TIME** spent by all staff preparing and presenting each Instruction Session

**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**

**7.1 Basic measure (“Number of Exhibitions”)**

 **COUNT number of physical Exhibitions**

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

7.5 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.)

**7.8 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**

**8.1 Basic measure (“Page Views”)**

 **COUNT total number of page views by Users**

8.2 Advanced measure (“Unique Page Views”)

 **COUNT** total number of unique page views by Users

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

8.5 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

8.7 Advanced measure (“Traffic Source”)

 **COUNT** each source from which online traffic is directed

8.8 Advanced measure (“Social Media Reach”)

 **COUNT** total number of interactions with social media

**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**

No two institutional plans will look the same or function in the same ways.

**Local Categories**
Develop and evolve your categorical lists according to your specific institutional needs and circumstances.

**Local Criteria**

Determine the criteria that works best for your services, your patrons and/or users, your collections, and your facilities.

**Local Priorities**

Organize your plan around the statistics you need to meet your services goals, to meet user needs based on assessment, to succeed in your advocacy efforts, and to work best within your local culture and 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)
* Compared each of the measures to current practice
	+ What are you doing/not already doing?
	+ Which measures applied to you?
	+ What do you want to know?
* 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 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**: SAA-RAO Assessment of Measures & Metrics for Public Services Sub-Committee

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