

ESTABLISHING A BASELINE

Piloting the New Standards for Measuring Public Services in Special Collections

NEW STANDARDS COMING SOON

Later this summer, a new professional standard will be published by a joint task force of the Society of American Archivists (SAA) and the Rare Book and Manuscript Section (RBMS) of ALA:

Standardized Statistical Measures and Metrics for Public Services in Archival Repositories and Special Collections Libraries

The standards are designed so that repositories of all sizes and all resources can easily keep the basic measures. Optional advanced measures allow for more robust tracking and assessment.

More precise definitions of public services functions will help special collections to better demonstrate value and impact. Local data collection at individual repositories will more accurately quantify services and evaluate operational effectiveness.

Across the profession, the standards will enable us to better compare institutions, establish benchmarks, and agree on best practices.

WHAT THE STANDARDS ARE NOT

The standards do not address qualitative assessment of user impacts, though some metrics could be used to that effect.

It was beyond the scope of the joint task force to develop a survey instrument or to establish a database or repository for data collection. Hopefully the user community will develop tools like these based on the standards once they are published.

**Many thanks to the 10 joint task force members
for 3 years of incredibly important work.**

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MEASURES V. METRICS

Measure = counts (Ex: 10 patrons)
**Metric = calculated ratio between
2 measures or an indep. variable**
(Ex: 10 patrons per day)

FEEDBACK BY UCR

The joint task force made drafts public and sought feedback from the special collections and archives community. The first draft of the proposed standards was available for public comment in a period from June - August 2016. The second draft was made available from January - February 2017. Public meetings held at SAA and ALA conferences also provided opportunity for input.

None of our staff were on the joint task force, but I have been closely following their work. I wanted to start adopting a draft version of the standards right away because we needed to establish baseline data for public services. I also wanted to help by offering feedback to the joint task force based on our pilot implementation of the draft standards. Our long term goals are to evaluate services, set priorities, and advocate for support.

In both comment rounds and at conferences, I provided feedback based on our pilot adoption of the draft standards. One major suggestion from UCR and others was that a separate domain was needed for instruction. In the second draft, the task force created a new domain that was distinct from other outreach and promotional events. Other feedback ranged from edits for clarity to suggestions for additional advanced measures.

AS ALWAYS, WITH STATISTICS...

Special collections and archives repositories will have to decide how to best collect their local data. How centralized or distributed should their data collection be? How lightweight or robust?

In the UC system, we will still have to conform to the Association of Research Libraries (ARL) and the University of California Office of the President (UCOP) reporting standards, so we may have to translate the new standards or track additional measures.

Beware of user error or messy data in any data collection effort. Manuals and training can help address this.

OUR CURRENT DATA COLLECTION PRACTICES

We collect public services data through our Special Collections Request System (Aeon by Atlas Systems), LibInsights, paper tallies for both staff and student assistants, a departmental Outlook calendar, and Excel spreadsheets.

We carefully reviewed both drafts of the standards and made decisions about which advanced measures we would adopt. For example, we are not currently counting the advanced measures of Time Spent Responding to reference questions, reference Question Purpose, or reference Question Complexity. We may add these Reference Transactions Domain advanced measures later.

As a repository that uses Aeon, we are not sure how we will gather some of our basic or advanced measures. Aeon does not easily deliver, display, or export all of the robust data collected in the reports interface. Hopefully we can push Atlas Systems to develop default reporting that matches the new professional standards.

For the User Demographics domain, we have thought about how our Aeon user registration form does not map well to the advanced measures we have defined. We just learned, however, that the original UC Aeon institutions agreed on a shared user registration form to standardize data. This poses a dilemma for us - should we align our form to our desired measures, or should we maintain consistency across the UC system? Are new Aeon users among the UCs even using the same form?

One major challenge for us has been the Online Interactions Domain. The UCR Library website was redesigned and launched in June of 2015. Due to a desire to prevent silos, Special Collections & University Archives was integrated throughout the UCR Library website pages, making it difficult to specifically count page views or other measures of web traffic for our department only.

**Take a look at our handouts for examples of
local implementation of the draft standards at UCR.**



Join the brand new
**Common Knowledge Group on
Public Services in Special Collections**
to connect with your UC colleagues
about these new standards and more!