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# Sailing into Metrics: Rethinking and Implementing Metrics and Assessment in Archives

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# Sailing into Metrics: Rethinking and Implementing Metrics and Assessment in Archives



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- SAA-ACRL/RBMS Joint Task Force on the Development of Standardized Statistical Measures for Public Services in Archival Repositories and Special Collections Libraries <http://www2.archivists.org/groups/saa-acrlrbms-joint-task-force-on-public-services-metrics>
- Implementation of Metrics and Assessment at the University of Nebraska at Omaha



# Statistical Measures for Public Services - Version 1, Summer 2016

## Domains:

- User Demographics
- Reference Transactions
- Reading Room Visits
- Collection Use
- Events (Separating instruction)
- Exhibitions
- Online Interactions (page views, etc. NOT email reference)



# User Demographics

Basic measure: User Type

Advanced measures:

- Registered User
- User Affiliation
- Type of Use

Metrics examples: Compare type of use with user type; Users by geographic region



## Reference Transaction

Basic measure: Reference Question

Advanced measures:

- Method (email, phone, in-person, etc.)
- Time Spent
- Purpose of Transaction
- Complexity of Transaction (READ scale, etc.)

Metrics examples: Total questions per day/week/month/year; Average time spent per question; Correlate staff time spent with User with time spent using the reading room



## Reading Room Visits

Basic measure: Reader Days

Advanced measures:

- Reader Hours

Metrics examples: Average visit length; Newly registered users; Ratio of newly registered users to total users; Average visits per day/week/month



## Collection Use

Basic measure: All Checkouts

Advanced measures:

- Reading Room Use
- Consultation Hours
- Exhibition Use
- Event & Activity Use
- Reproductions +
- Interlibrary Loans +
- (+Citations/Publications)

Metrics examples: Average # of pages per reproduction order; Ratio of reproduction requests to reading room visits







## Events

Basic measure: Number of Events

Advanced measures:

- Number of Attendees
- Type of Event (+Instruction)
- Event Prep Time
- Length of Event

Metrics examples: Average number of collection units used per event; Average prep time per attendee



## Exhibitions

Basic measure: Number

Advanced measures:

- Duration
- Visitors
- Preparation Time
- Types
- Publications

Metrics examples: Average number of visitors per exhibition; Average visitors per day/week/month





# Online Interactions

Basic measure: Page Views

Advanced measures:

- Unique Page Views
- Session Time
- Traffic Source
- Downloads
- Downloaded Material Type
- Social Media Reach

Metrics examples: Average downloads per user; Loyalty



# Proposed Public Service Measures

- More details on SAA website
- Submit comments & suggestions
- Version 2 release expected January 2017



## Qualitative

How do we measure our impact?  
How do we collect & tell our stories?





# Implementing Data Gathering

Why?

What do we have?





# Implementing Data Gathering

## Instruction & Tours (existing library form)

- Number of people
- Total time
- Course





## More Implementation

### Researchers in the Reading Room

- Time of day (when do people *actually* visit?)
- Total time (minutes)
- Number of books and collections used
- User type (self-identified)
- Collecting areas used







## Reading Room Form - LibInsight

Record Data to Archives & Special Collections Reading Room

Go To:

Don't want to record data manually? You can also upload data in bulk! [Upload File](#) Or you can also [Manage your Records](#)

Pre-Defined Entries [?](#)

Entered By

Internal Notes

- Reading Room \*
- 8-9am
  - 9-10am
  - 10-11am
  - 11am-12pm
  - 12-1pm
  - 1-2pm
  - 2-3pm
  - 3-4pm
  - 4-5pm
  - Other

Start Date [?](#)

Duration (minutes)

Books

Archival & Manuscript Material [?](#)

- User Type
- Alumni
  - Donor
  - Faculty
  - General Public
  - Graduate Student
  - High School Student
  - Undergraduate Student
  - University Staff



# Implementation continuing

## Researchers / Reference Transaction

- Question & Answer
- User type
- User affiliation
- How received
- Reason for use (Reviewed & changed)
- Service provided
- Duration
- How many days
- Search tools used (Reviewed & changed)
- Any referral
- Collecting area



## Researchers Form - LibInsight

Record Data to Archives & Special Collections Researchers

Go To: Archives & Special Collections Researchers ▼

Don't want to record data manually? You can also upload data in bulk! [Upload File](#) Or you can also [Manage your Records](#)

Pre-Defined Entries ?

Entered By Schindler, Amy ▼

Internal Notes

Start Date ?

Question \*

Response \*

User Type

Affiliation

Received \*   
Phone  
Walk-in  
Other  
Social Media

Reason For Use \*

Service

Duration (minutes) \*

Multiple Days

Search Tools Used \*

Referral



# Adopting Springshare LibAnalytics (2014), LibInsight (2015)

- Discuss
- Demo
- Test
- Discuss
- Implement
- Check-in
- Quality control





## Outcomes

- Internal data sharing
- Year in review document (new bosses!)
- Processing
- Acquisitions
- Digital initiatives
- Positioned for assessment program
- Staffing - yes & no





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