

ARL Profiles: Emerging Themes

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A project report presented to the ARL Statistics and Assessment Committee.

Background

Four members of the 2009-2010 ARL RLLF program (Bob Fox, Pat Reakes, Brian Skib, and Ann Snowman) selected the Qualitative Profile initiative as their RLLF group project. The group began conversations with Martha Kyrillidou, Senior Director for ARL Statistics, in March 2010 about the Qualitative Profile initiative and potential contributions by the fellows in support of the initiative. The agreed scope of the project was that the fellows would use information gleaned from the profiles to make recommendations that might inform future changes to the ARL Annual and Supplementary Statistics. Initially, the fellows read the submitted profiles, worked to complete the profiles for their home institutions, and reviewed the initial data coding of the profiles as it became available. Through a series of conference calls, Martha and the fellows refined the possible scope and deliverable for their project and the themes that were beginning to emerge from the profiles. The fellows attended the Statistics and Assessment Committee meeting at the April 2010 ARL Membership Meeting. At this meeting, Committee Chair Bill Potter distributed a draft committee report on the profiles. Armed with the report and their previous observations, the fellows drafted a list of themes that warranted consideration. The fellows distributed this list to the other program fellows and asked them to share it with others at their institutions. We specifically requested consideration for which of the themes warranted additional study, how they might be studied or be appropriate for data collection, and with what frequency. Where some type of data collection might be warranted, we also asked for recommendations on the appropriate collection mechanism (ARL Annual/Supplementary Statistics, SPEC survey, ARL Salary Survey, etc.) The form that we distributed is attached as Appendix A.

Potential Themes

The themes that emerged from the review of the profiles are:

- Development/Fund Raising/Grantsmanship
- Digital publishing
- E-science/Data curation and management
- Collaborations across all levels and on/off campus
- Scholarly communication
- Assessment activities/Space utilization
- Social networking tools/mobile applications
- Staffing changes (i.e. new or reworked positions, new job titles, degree requirements)
- Collaborative collection building/development
- Warehousing/remote storage
- Instruction activities - current statistics include actual classroom instruction but do not capture efforts preparing materials for asynchronous instruction or the use of those materials (web guides, podcasts, etc.)

- Digitization efforts beyond or more specific than those already collected in the Supplementary Statistics (IRs, created and converted digital collections, etc.)

Horizons - an open-ended question requesting feedback from each institution annually on areas of emerging interest - new services, trends, services/resources you no longer provide, etc.

Responses to potential themes

In addition to input from the four fellows working on the project, we received 21 additional responses to our request to review the potential themes. These responses are summarized below by theme. The full responses are attached as Appendix B.

Development

Respondents in general believed this to be an important area for libraries and somewhat valuable for data collection. Responses were more mixed on what information might be collected. While dollars are very measurable, some concern was expressed whether grant funding should be separated from general fund raising. There were also concerns on how deferred giving/estate planning gifts and in-kind gifts might be addressed. Some respondents thought that a narrative report or a SPEC survey might be best here rather than statistics.

Digital Publishing

While there were several respondents who agreed that digital publishing activities represented a growing area of interest for research libraries, there was little consensus on what should be measured or how often. Suggestions for potential questions included: How many new e-journal titles did your library publish this year? How many e-journal issues did your library publish this year? How many e-books did your library publish this year?

E-science/Data curation

There was consensus that this area was very valuable but a concern was expressed that e-science *activity* may not yet be widespread enough to merit annual collection. Many libraries might answer that they are thinking about this type of service but are not actually providing the service yet. Please note that a report on E-science activities was published August 2010 and is available at: <http://www.arl.org/resources/pubs/reports/index.shtml>

Collaborations

While collaborative partnerships are critical for research libraries, there was little interest expressed in collecting any information here. Most respondents felt that there was little that could be quantitatively expressed and that any attempt to do so would be based on ambiguous criteria.

Scholarly Communications

There was recognition of the significant impact of this theme but almost no interest in attempting to address it through the annual or supplementary statistics. A number of respondents did feel that a narrative report possibly including best practices would be of value. Two recent SPEC Kits, SP299 Scholarly Communication Education Initiatives, August 2007 and SP310 Author Addenda, July 2009, have addressed scholarly communication components but perhaps a survey with a broader scope may be valuable.

Assessment

Respondents indicated little interest in collecting information regarding assessment activities. There was limited interest in a narrative report or SPEC survey but there has been a somewhat recent SPEC Kit (SP303 Library Assessment, December 2007).

Space Utilization

While one respondent suggested number of square feet renovated and cost per square foot for renovations as possible measurable data points, there was little overall interest in data collection for this theme. There was interest, however, in looking at studies of space utilization and reviewing innovative uses or best practices associated with library spaces. This theme may be valuable for a SPEC or ad hoc survey.

Social Networking/Mobile Applications

One potential question suggested for mobile applications would solicit the percentage of library-student interactions accomplished through mobile devices versus other methods. Most respondents though did not feel that either of these themes lent themselves well to data collection and that a SPEC survey would be the appropriate venue for determining library usage here. SP304 Social Software in Libraries, July 2008, does address social networking but may be suitable for an update at some point. It does not appear that mobile applications have been a SPEC survey subject.

Staffing Changes

Respondents indicated a broad interest in areas such as new types of library positions and changing educational requirements for positions. There was also some interest in folding succession planning into this topic. While some respondents believed the topic might warrant annual or periodic data collection, no potential questions were offered. The potential for a SPEC survey was also noted. Previous SPEC Kits (SP256 Changing Roles of Library Professionals, May 2000; SP257 The M.L.S. Hiring Requirement, June 2000; and SP276 Recruitment and Retention, September 2003) have provided some coverage for this area but are several years old so it may be timely to revisit this theme.

Collaborative Collection Building

Respondents believed this theme to be valuable and felt that a SPEC survey would be the most appropriate tool to address it. There are no recent SPEC Kits focusing on this theme.

Warehousing/Remote Storage

Respondents had very mixed reactions to this theme. Some felt the theme was valuable enough that it should be included with the annual statistics. Potential questions included the percentage of collections in remote storage and whether remote storage was managed on an institutional or consortial basis. One respondent felt a SPEC survey would be valuable. Others questioned whether the use of remote storage should be studied at all as they viewed it not as any quality or service measure but simply a reflection that the library lacked shelving space.

Instruction Activities

There was widespread interest in this theme. Respondents felt that the current statistics did not adequately reflect efforts in this area. Particularly, respondents indicated that the current statistics should be amended to include asynchronous instructional activity such as number of podcast or web guide views. There was also interest in noting how many libraries link instructional support tools to course management systems.

Digitization Efforts

There was interest in broadening the current data collection for this theme in the supplementary statistics to collect specific information on the number of “born digital “ and converted documents added as well as more detailed information on institutional repositories.

Horizons

We asked respondents to comment on the value of an open-ended question each year seeking institutional response on new services, trends, emerging interest areas, and areas where services have either been reduced or discontinued. While some respondents noted that the question would produce no quantifiable information or might be too broad, all agreed that it would be interesting to see the ideas shared.

Summary

Respondents supported amending the current annual and supplementary statistics to seek additional information on instructional and digitization activities. They also believed an open-ended “horizons” question could produce an interesting view on current trends and should be considered for inclusion with the annual statistics. They felt that several of the themes (Development, Scholarly Communication, Assessment, Space Utilization, Mobile Applications, Staffing Changes, and Collaborative Collection Building) could be studied in future SPEC surveys though some may be more appropriate as an ad hoc survey. Limited interest was expressed in adding either annual or supplementary statistics questions in the areas of development, digital publishing, space renovation, and mobile application usage. These may warrant further attention but lacked strong support at this time. Finally, there was interest expressed in having an ongoing periodic narrative report from member institutions that went beyond the quantitative information supplied through the annual and supplementary statistics. Perhaps some version of the qualitative profile could fill this expressed need for telling the stories of how libraries meet their user needs.

The findings of this report will be shared with members of the Statistics and Assessment Committee, the upcoming statistics task force, and with key ARL personnel to determine which

themes warrant data collection and what collection and reporting mechanisms would be most appropriate.

This report and its appendices are available online at:
<http://www.arl.org/bm~doc/profilesRLLFproject.pdf>

APPENDIX A:

Fellows sent the following inquiry to other program fellows and colleagues:

Most ARL libraries have completed a qualitative profile within the last two years addressing the library's facilities, collections, and services. A summary report from these profiles is located at:
<http://directors.arl.org/wiki/institution-profiles>

Our team of ARL RLLF fellows (Bob Fox, Pat Reakes, Bryan Skib, and Ann Snowman) has been reviewing themes that emerged in the qualitative profiles to help inform future iterations of ARL Statistics. We'd like your help in reviewing these themes personally as well as sharing them with colleagues at your institutions. For each theme, consider whether this is a matter that should be included in statistics gathering. For example, an area may be of interest but we may not be able to collect useful data for it.

If the theme warrants data collection, are the ARL Annual Statistics and Supplementary Statistics the place for their collection or would another data collection mechanism be more appropriate? (ARL Salary Survey, SPEC Kits, etc.)

Finally, should this data be collected each year or should it be included periodically?

Potential Themes

Development/Fund Raising/Grantsmanship - activities/staffing/successes

Digital publishing (i.e. OJS)

E-science/Data curation and management

Collaborations across all levels and on/off campus

Scholarly communication (open access/author rights, etc.)

Assessment activities (i.e. data portals, data driven decisions)

Space utilization (innovative renovations/uses, gate counts, etc)

Use of social networking tools/mobile applications

Staffing changes (i.e. new or reworked positions, new job titles, degree requirements)

Collaborative collection building/development

Warehousing/remote storage (shared/individual, on/offsite, active use/dark archive, etc.)

Instruction activities - current statistics include actual classroom instruction but do not capture efforts preparing materials for asynchronous instruction or the use of those materials (web guides, podcasts, etc.)

Digitization efforts beyond or more specific than those already collected in the Supplementary Statistics (IRs, created and converted digital collections, etc.)

Horizons - an open-ended question requesting feedback from each institution annually on areas of emerging interest - new services, trends, services/resources you no longer provide, etc.

APPENDIX B:

Responses concerning: Development/Fund Raising/Grantsmanship - activities/staffing/successes

RESPONSE ONE: “Yes, this would be of interest, especially as decreasing budget resources requires academic libraries to place more focus on private fund-raising. I would separate information on grants from development: the latter tends to be based on friend-raising and requires different skills and resources. I realize that foundation grants are a grey area, because they are a cross between grants and fund-raising.”

“Even simple stats on dollar amounts raised would be useful, and would provide libraries with comparative data. For example, how much private funding would a library serving 25,000 students be expected to raise? Consider separating deferred gifts from cash gifts. The balance between the two often changes based on the economy.”

RESPONSE TWO: “I don’t think this should be in statistic gathering. It seems like it belongs in a narrative.”

RESPONSE THREE: “**grants received** would be good.”

RESPONSE FOUR: “Warrants data collection. Reporting annually seems advisable”

“... At least some aspects are amenable to quantitative measures which could be reported annually; qualitative data may also be valuable but would take some careful thought to facilitate both useful and relatively easy reporting; annually”

RESPONSE FIVE: “Everyone is doing this – maybe grants would be a good distinguishing criteria.”

RESPONSE SIX: “Of the most interest to me would be capturing current, changing and best or innovative practices regarding the following themes you guys identified:
Development/fundraising/grants”

RESPONSE SEVEN: “Yes, important for everyone to be doing, and measurable (dollars)”

RESPONSE EIGHT to RESPONSE SEVEN: “Agreed, but it needs to clearly define what is raised by the unit as opposed to what is raised on behalf of the unit by the Foundation, etc...”

RESPONSE NINE RESPONDING to SEVEN and EIGHT: “Another challenge will be to define what counts as a dollar: does a \$100 check count the same as \$100 of deferred giving (like

estate planning)? And how about in-kind donations -- what if two different institutions estimate the same in-kind gift as having different monetary values? I realize these sound like nitpicky questions, but the answers to them could have a significant impact on the cross-institution reliability of the data."

RESPONSE TEN: "Periodically "

RESPONSE ELEVEN: "this is of interest; but SPEC Kit seems adequate."

RESPONSE TWELVE: "(Annual)"

Responses concerning: Digital publishing (i.e. OJS)

RESPONSE ONE: "The entire area of digitization-digital publishing-scholarly communications is of great interest, but is not geared towards data collections because it is not easily quantified and the definitions are murky. I suggest that this area be targeted for a separate study. Academic libraries are investing a lot of resources into scholarly communications efforts, but the ROI is not easily described."

RESPONSE TWO: "I'd combine with Scholarly communication"

RESPONSE FIVE: "This would be a good criterion to measure."

"Digitization efforts beyond or more specific than those already collected in the Supplementary Statistics (IRs, created and converted digital collections, etc.) - Good if innovative, new, unique, interesting, etc.: Digital publishing (i.e. OJS) "

RESPONSE SEVEN: "Not yet widespread enough to be a measure for all."

RESPONSE EIGHT to RESPONSE SEVEN: "Agreed."

RESPONSE NINE RESPONDING to SEVEN and EIGHT: "It's true that "digital publishing" is a big and fuzzy concept, but it might be useful to ask for stats reflecting very specific types of initiative: Have you started up any new ejournals this year? If you have existing ejournals, how many issues were published? Have you published any ebooks? Did you create (or finally make public) a new digital collection of some kind?"

RESPONSE TEN: "Periodically "

RESPONSE ELEVEN: "Supplementary Stats; annually"

RESPONSE TWELVE: "Digital Publishing ... (Annual)"

Responses concerning: E-science/Data curation and management

RESPONSE ONE: "See above." (Referencing scholarly communication and digital publishing.)

RESPONSE TWO: "Are you trying to get a handle on the types of activities...again, in a narrative."

RESPONSE FOUR: "Warrants data collection. At least some aspects are amenable to quantitative measures which could be reported annually; qualitative data may also be valuable but would take some careful thought to facilitate both useful and relatively easy reporting; annually"

RESPONSE FIVE: "This would be a good criterion."

RESPONSE SEVEN: "Important, potentially measurable, maybe implementation not yet wide enough."

RESPONSE EIGHT to RESPONSE SEVEN: "Agreed on all points. I suspect that there would be a lot of responses that indicate "We're thinking about this."

RESPONSE NINE RESPONDING to SEVEN and EIGHT: "Agreed."

RESPONSE TEN: "Periodically"

RESPONSE ELEVEN: "??Don't know"

RESPONSE TWELVE: " (Annual)"

RESPONSE THIRTEEN: "I'd say these are the areas that are and will have the largest impact on ARL libraries moving forward: E-science/Data curation and management."

RESPONSE FOURTEEN: "Looks like a really good list, [XXX]. The few that stand out to me as being particularly worthy of measurement are **E-science/Data curation** and management, Scholarly Communication, Staffing changes, and Warehousing/remote storage. "

RESPONSE TWENTY: "Agreed. Either people are thinking about it or everyone's definition of "escience/data curation and management" is different. "

Responses concerning: Collaborations across all levels and on/off campus

RESPONSE ONE: “I would like to see more focus on liaison activities, which appears to be the new definition of what subject specialists do. Has anyone considered measuring faculty contacts, perhaps in the form of faculty contact hours? A parallel methodology could be measuring student-contact hours. For example, student contact hours might better measure not only the time spent in a classroom, but in follow-up consultations.”

“I believe this convention is used elsewhere in education—secondary ed?—but I have not seen it used in academic libraries. If we are to become truly student-centered, to use Penn State parlance, then we need to measure this student-centeredness in meaningful ways.”

RESPONSE TWO: “to what end? Crucial for success but not for statistics.”

RESPONSE THREE: “ NO”

RESPONSE FOUR: “Warrants data collection. At first blush, this doesn’t seem overly amenable to useful quantitative data collection; qualitative data would take some careful thought to facilitate both useful and relatively easy reporting; perhaps every other year or as there are things to report”

RESPONSE FIVE: “Not sure this would be worthwhile.”

RESPONSE SEVEN: SPEC Kit. “Too easy to fudge numbers to be a measurement. Yes, I’m slightly cynical.”

RESPONSE NINE RESPONDING to SEVEN and EIGHT: “I agree here as well. “Collaboration” is another example of a big fuzzy concept that is only meaningfully measurable if you ask very specific and narrow questions. And I’m not sure what those would look like. Collaboration is one of those Great and Good Ideas that we should all be leery of claiming we can measure in any real way.”

RESPONSE TEN: “Periodically “

RESPONSE ELEVEN: “I don’t know that this is measurable quantitatively; perhaps a qualitative SPEC investigation is merited.”

RESPONSE THIRTEEN: “I’d say these are the areas that are and will have the largest impact on ARL libraries moving forward: Collaborations across all levels and on/off campus “

Responses concerning: Scholarly communication (open access/author rights, etc.)

RESPONSE ONE: "See above" (Referencing E-Science.)

RESPONSE TWO: "I'd fold data curation into this and again, more narrative or a SPEC Kit...it would be a good SPEC Kit."

RESPONSE FOUR: "Warrants data collection. At first blush, this doesn't seem overly amenable to useful quantitative data collection; qualitative data would take some careful thought to facilitate both useful and relatively easy reporting; perhaps every other year or as there are things to report"

RESPONSE FIVE: "This would be a good criterion, although it would depend on the academic environment beyond the Libraries."

RESPONSE SIX: "Of the most interest to me would be capturing current, changing and best or innovative practices regarding the following themes you guys identified: Scholarly communications"

RESPONSE SEVEN: "Measurable?"

RESPONSE EIGHT to RESPONSE SEVEN: "Nope. So, it is a qualitative description of where we stand at each institution. Interesting, I guess. "

RESPONSE NINE RESPONDING to SEVEN and EIGHT: "Like "collaboration," the concept is too broad for meaningful measurement. You can measure the size of an IR, the number of classroom hours spent educating people on copyright issues, and the number of faculty on editorial boards of OA journals. But I doubt that you can combine those numbers into a single datum that measures "scholarly communication."

RESPONSE TEN: "Periodically "

RESPONSE ELEVEN: "This is of interest; but SPEC Kit seems adequate."

RESPONSE TWELVE: "4) Scholarly Communication (can assess by number of events/programs and instruction sessions, another area we excel by providing Open Access Week programming and instruction to faculty) (Annual)"

RESPONSE THIRTEEN: "I'd say these are the areas that are and will have the largest impact on ARL libraries moving forward: Scholarly communication (open access/author rights, etc.)"

RESPONSE FOURTEEN: “Looks like a really good list, [XXX]. The few that stand out to me as being particularly worthy of measurement are E-science/Data curation and management, Scholarly Communication, Staffing changes, and Warehousing/remote storage. “

Responses concerning: Assessment activities (i.e. data portals, data driven decisions)

RESPONSE ONE: "I don't see how we would measure this. A better measure would be the outcomes of the applications of assessment."

RESPONSE TWO: "these activities should drive decisions, not an end in themselves"

RESPONSE FOUR: "Warrants data collection. Qualitative data seems the only reasonable data and would take some careful thought to facilitate both useful and relatively easy reporting; perhaps every other year or as there are things to report."

RESPONSE FIVE: "Not sure what is being measured here?"

RESPONSE SIX: "I am interested in the assessment activities, but would like to know how it is used to direct organizational change or service refinement or other innovations. ...".

RESPONSE SEVEN: "This sounds like it should be measurable, but..."

RESPONSE EIGHT to RESPONSE SEVEN: "Measurable?" "We made three data-driven decisions this year. They were..." I think that this is too squishy. After all, isn't the political environment in which one works a data point that we should be considering when making decisions?"

RESPONSE NINE RESPONDING to SEVEN and EIGHT: "Agreed."

RESPONSE TEN: "Helpful for those with assessment assignments; probably better as some kind of narrative (Annually)"

RESPONSE ELEVEN: "I don't know that this is measurable quantitatively; perhaps a qualitative Spec Investigation is merited."

Responses concerning: Space utilization (innovative renovations/uses, gate counts, etc)

RESPONSE ONE: "Possible measures: # of square feet renovated and the cost per SF; also time spent on computer in library"

"I keep thinking about the recommendation to use toilet paper usage as a measure of student use of the library! "

"A form of assessment that is under-utilized in academic libraries is observational studies. We have too little understanding of what students actually do in libraries: how long do they stay in their seat? How many functions (get coffee, check a book, talk to a friend) take place during their visit? How much time do they spend in the library? What is the time scope of their visits? Etc., etc. "

RESPONSE FOUR: "Warrants data collection. I'm not exactly sure why "gate counts" got put in the parenthetical explanation for this one. If it truly is a good fit it's easy quantitative data to report. Otherwise, qualitative data seems the only reasonable data to report and a narrative seems appropriate (unless you ask for something like "square footage repurposed"; perhaps every other year or as there are things to report."

RESPONSE FIVE: "This would be a good criterion – the innovative part, not the gate count parts."

RESPONSE SIX: "Of the most interest to me would be capturing current, changing and best or innovative practices regarding the following themes you guys identified: Space utilization"

RESPONSE SEVEN: SPEC Kit? "Useful information to have, but I don't see this as a measurement. "

RESPONSE EIGHT to RESPONSE SEVEN: "Agreed."

RESPONSE NINE RESPONDING to SEVEN and EIGHT: "Yup. You can measure your space, and you can measure how full it is. But I don't see how you measure its "utilization." "

RESPONSE TEN: "Periodically "

RESPONSE ELEVEN: "This is of interest; but SPEC Kit seems adequate."

RESPONSE TWELVE: "5) Space utilization ... (Annual)"

Responses concerning: Use of social networking tools/mobile applications

RESPONSE ONE: “What % of library-student interactions take place in mobile devices, through the web homepage, etc., and how are these percentages changing with time?”

RESPONSE TWO: “belongs with other technology stuff...not in statistics...perhaps a SPEC Kit”

RESPONSE FOUR: “Warrants data collection. Some quantitative data reflective of use of such tools might well be available and useful to report; qualitative data could be a narrative describing new efforts and revisions to ongoing efforts; annual reporting of any quantitative data.”

RESPONSE FIVE: “This would be a good criterion.”

RESPONSE SEVEN: “SPEC Kit.”

RESPONSE EIGHT to RESPONSE SEVEN: “Agreed.”

RESPONSE NINE RESPONDING to SEVEN and EIGHT: “Yup.”

RESPONSE TEN: “Provide information on how rapidly these trends are being adopted. (Annually)”

RESPONSE ELEVEN: “??-don’t know”

RESPONSE FIFTEEN: “You have social networking...but perhaps a mention of technology as the interactive/collaborative/business-approach sort of ... dare I say it ... the Google Books sort of database creation. We need something that approximates what we’d like OLE to become—an Open kind of community-based/networked knowledge repository. “

Responses concerning: Staffing changes (i.e. new or reworked positions, new job titles, degree requirements)

RESPONSE ONE: “Yes, new or re-described positions and in what areas they occur. Most of our resource allocation is in people, but we have inadequate tools to measure this. Where are we putting our shrinking dollars?”

RESPONSE TWO: “would be good to gather these in the statistics gathering process”

RESPONSE THREE: “yes, as part of annual.”

RESPONSE FOUR: “Warrants reporting. Narrative only; annually”

RESPONSE FIVE: “Don’t know that this would be worthwhile.”

RESPONSE SEVEN: “Good info to have, but not a measurement.”

RESPONSE EIGHT to RESPONSE SEVEN: “Honestly, this could be a SPEC Kit in itself. Dividing up the types of positions into different categories and providing copies of announcements, etc....”

RESPONSE NINE RESPONDING to SEVEN and EIGHT: “Staffing changes are measurable, but I’m not sure the measure would necessarily be meaningful. Maybe it’s useful to know that in 2008 there were 30 Scholarly Communication Librarians in ARL libraries, and in 2010 there are 75. But is it useful enough to justify the cost of gathering the data? Maybe so.”

RESPONSE TEN: “Periodically_”

RESPONSE ELEVEN: “Annual info would be very valuable; would have to be more than merely quantitative to be of valuable .” (sic)

RESPONSE THIRTEEN: “I’d say these are the areas that are and will have the largest impact on ARL libraries moving forward: Staffing changes (i.e. new or reworked positions, new job titles, degree requirements)”

RESPONSE SIXTEEN: “For staffing changes, I recall that loads of retirements are coming up, yes? How will this impact the top level library leadership ranks? Besides RLLF, where are ARL’s going to get their next batch of Directors and Deans?”

Responses concerning: Collaborative collection building/development

RESPONSE ONE: “Not sure how to measure this—percentage of collections budget that is a result of consortial relationship? This information doesn’t seem all that useful except to each institution.”

RESPONSE TWO: “ already counted in statistics. For example, we could have counted all the Wiley titles that were sent to IU in our print journal archive project (failed, but good example!)”

RESPONSE FIVE: “could be useful.”

RESPONSE SEVEN: SPEC Kit. “ Also would be measurable.”

RESPONSE EIGHT to RESPONSE SEVEN: “Agreed.”

RESPONSE NINE RESPONDING to SEVEN and EIGHT: “Yes.”

RESPONSE TEN: “Important trend to follow; probably better as some kind of narrative(Annually)”

RESPONSE ELEVEN: “This is of interest; but SPEC Kit seems adequate. “

RESPONSE SEVENTEEN: “There might be some value in knowing more about the number of new and ongoing relationships between institutions that exist – and perhaps the number of (and value of) items acquired as a result of these relationships. I’m not sure if it would be useful to try to capture numbers by subject area – even by general area (i.e. science, humanities, social science, other). Should these numbers only apply to print volumes? Or e-resources too? Does each collaborating institution get to count these in their stats? Only the one that houses the physical volume? There will likely be much more to these situations than just the numbers, but the numbers might show trends.”

Responses concerning: Warehousing/remote storage (shared/individual, on/offsite, active use/dark archive, etc.)

RESPONSE ONE: “Percentage of collection in remote storage vs. on-site? We could measure the # of materials e-repositories.”

RESPONSE TWO: “Archiving initiatives would make a good SPEC Kit.”

RESPONSE THREE: “YES”

RESPONSE FOUR: “Warrants data collection. At least some aspects are amenable to quantitative measures which could be reported annually; qualitative data may also be valuable but would take some careful thought to facilitate both useful and relatively easy reporting; annually.”

RESPONSE FIVE: “Don’t think this would be useful to any great extent.”

RESPONSE SEVEN: “Good information, but doesn’t go to the quality of the library, just the lack of room in the stacks. “

RESPONSE EIGHT to RESPONSE SEVEN: “Agreed.”

RESPONSE NINE RESPONDING to SEVEN and EIGHT: “Actually, I think this information could be very interesting in tandem with information about changes in staffing, materials budget, etc. Coming up with the data points would be a nightmare, though.”

RESPONSE TEN: “Periodically”

RESPONSE ELEVEN: “Supplementary Stats; annually”

RESPONSE FOURTEEN: “Looks like a really good list, [XXX]. The few that stand out to me as being particularly worthy of measurement are E-science/Data curation and management, Scholarly Communication, Staffing changes, and Warehousing/remote storage”

RESPONSE SIXTEEN: “I would be interested in learning more about remote storage within consortia. Maybe a few questions about remote storage at each ARL and if their program is a local effort only or from a state or regional perspective. “

RESPONSE SEVENTEEN: “Knowing the extent to which external storage facilities are being used might be of some value. The total number of volumes stored off site and the number of retrieval requests might be interesting. The number of volumes contributed to a joint storage facility (as the SUL will be doing) might also be of interest. Who gets to count these volumes when they are turned over to a shared storage facility and no longer “owned” by the original institution?”

RESPONSE EIGHTEEN: "I'm glad warehouse/remote storage will be covered. This way, we can include records management stats. Plus, the ...dark archive's stats (...) can go in a more appropriate place."

RESPONSE NINETEEN: "See "Collaborations ..." above. However, if this is included, annual reporting of quantitative data related to this would be appropriate "

Responses concerning: Instruction activities - current statistics include actual classroom instruction but do not capture efforts preparing materials for asynchronous instruction or the use of those materials (web guides, podcasts, etc.)

RESPONSE ONE: “Agree. This would be a very useful study. The Ithaka Report calls for the balance of subject librarians’ efforts to be tipped towards instruction, however that is defined. We need to measure these efforts in a more effective way. Conventional wisdom indicates that instruction promotes the use of collections and websites—but this has not been studied in depth. (I believe that E Cahoy has done some research in this area....)”

RESPONSE TWO: “current statistics include actual classroom instruction but do not capture efforts preparing materials for asynchronous instruction or the use of those materials (web guides, podcasts, etc.)”

RESPONSE FOUR: “Warrants data collection. At least some aspects are amenable to quantitative measures which could be reported annually; qualitative data may also be valuable but would take some careful thought to facilitate both useful and relatively easy reporting; annually.”

RESPONSE FIVE: “This would be OK if it was innovative stuff (like the space utilization above – with emphasis on innovative).”

RESPONSE SIX: “Of the most interest to me would be capturing current, changing and best or innovative practices regarding the following themes you guys identified: **Instructions activities**”

RESPONSE SEVEN: “Maybe a new definition for the current statistic?”

RESPONSE EIGHT to RESPONSE SEVEN: “Agreed. Revise the stats. Don’t make us respond to the same question twice. “

RESPONSE NINE RESPONDING to SEVEN and EIGHT: “Vigorously agree.”

RESPONSE TEN: “Statistics should be captured annually since many patrons use the library remotely as opposed to coming into the building. ARL Statistics would be an appropriate place to collect this data. (Annually)”

RESPONSE ELEVEN: “Supplementary Stats; annually”

RESPONSE TWELVE: “ (I know that I along with all the subject librarians are spending time this summer creating new subject guides using the LibGuides software. Usage stats will be available for assessment and statistical analysis) (Annual)”

“Also, under Instruction, I would like to see how many libraries have teaching faculty who have

their course management software (Sakai, Blackboard) link to their libraries online resources (databases or reserves or subject guides) (Annual)”

RESPONSE NINETEEN: “I don't have a lot of feedback: agree with the direction your group is going in terms of instruction - capturing asynchronous and use of tutorials, resource guides, etc_... I'd like to see the instruction category not be a catch all for tours, orientations, classes, outreach events, use of library space by non-library staff. These are all important components of our agenda and to be able to see what other ARL Libraries are doing would help - as we break most of these things locally in our instruction log.”

Responses concerning: Digitization efforts beyond or more specific than those already collected in the Supplementary Statistics (IRs, created and converted digital collections, etc.)

RESPONSE ONE: See above.

RESPONSE FOUR: "Warrants data collection. At least some aspects are amenable to quantitative measures which could be reported annually; qualitative data may also be valuable but would take some careful thought to facilitate both useful and relatively easy reporting; annually."

RESPONSE SEVEN: "Again a broader definition may be in order."

RESPONSE EIGHT to RESPONSE SEVEN: "Agreed. Revise the stats. Don't make us respond to the same "question twice.

RESPONSE NINE RESPONDING to SEVEN and EIGHT: "Strenuously agree."

RESPONSE TEN: "Periodically

RESPONSE ELEVEN: "This is of interest; but Speck Kit seems adequate."

Responses concerning: Horizons - an open-ended question requesting feedback from each institution annually on areas of emerging interest - new services, trends, services/resources you no longer provide, etc.

RESPONSE ONE: “ Impact of our digitization efforts—how are (and if?) our digital collections being used? Have we digitized the right collections? What demographic uses them? Are they used for teaching or for research? Are the images downloaded?”

RESPONSE FIVE: “Good open-ended question, just to see what ideas are mentioned.”

RESPONSE SEVEN: “An annual horizons report would be great! That said, I don’t see it as a measurable statistic.”

RESPONSE EIGHT to RESPONSE SEVEN: “Honestly, I think that this is almost as valuable as anything else. I don’t know that I would leave this as open ended though. Imagine that this has been done for a couple years.... A question that asked institutions to respond to the points above with reference to the response that they submitted the previous year – how had the horizons that they thought they were approaching, etc... changed, been impacted by events within and beyond their control, etc... “

RESPONSE NINE RESPONDING to SEVEN and EIGHT: “Agree that this won't yield much in the way of rigorously quantitative data, but the answers would sure be interesting.”

RESPONSE TEN: “Definitely collect this information, if not annually, then biannually; probably better as some kind of narrative (Annually)”

RESPONSE ELEVEN: “Great idea for annual survey.”

RESPONSE THIRTEEN: “I’d say these are the areas that are and will have the largest impact on ARL libraries moving forward:UF4Horizons - an open-ended question requesting feedback from each institution annually on areas of emerging interest.”

RESPONSE NINETEEN: “Absolutely”

Specific method/metrics mentioned

- Development/Fund Raising/Grantsmanship - activities/staffing/successes
 - Even simple stats on dollar amounts raised would be useful, and would provide libraries with comparative data. For example, how much private funding would a library serving 25,000 students be expected to raise? Consider separating deferred gifts from cash gifts. The balance between the two often changes based on the economy
- Collaborations across all levels and on/off campus
 - I would like to see more focus on liaison activities, which appears to be the new definition of what subject specialists do. Has anyone considered measuring faculty contacts, perhaps in the form of faculty contact hours? A parallel methodology could be measuring student-contact hours. For example, student contact hours might better measure not only the time spent in a classroom, but in follow-up consultations.
- Space utilization (innovative renovations/uses, gate counts, etc)
 - Possible measures: # of square feet renovated and the cost per SF; also time spent on computer in library
 - Observational studies – how is the space used, by whom, for how long
 - Time spent on a computer in library
- Use of social networking tools/mobile applications
 - What % of library-student interactions take place in mobile devices, through the web homepage, etc., and how are these percentages changing with time?
- Warehousing/remote storage (shared/individual, on/offsite, active use/dark archive, etc.)
 - Percentage of collection in remote storage vs. on-site? We could measure the # of materials e-repositories.
- Digital publishing (i.e. OJS)
 - Impact of our digitization efforts—how are (and if?) our digital collections being used? Have we digitized the right collections? What demographic uses them? Are they used for teaching or for research? Are the images downloaded?

Specific SPEC Kit or Ad hoc Study Suggestions

- Scholarly communication (open access/author rights, etc.)
- Use of social networking tools/mobile applications
- Warehousing/remote storage (shared/individual, on/offsite, active use/dark archive, etc.)
- Digital publishing (i.e. OJS)

Ad Hoc suggestions:

RESPONSE THREE: “ [...] A few comments below in red. Re what's coming (from my perspective)/ some desirable items?

Communications - e.g. newsletters produced

Who has staff associations?

Professional development hours

Travel support levels

Website - size, traffic (hits, etc.)”

“[XXX], I'm not sure how helpful I can be here, but I think it clear that there would have to be a LOT of difficult definition work to do to render any of the categories you enumerate (as below) for data gathering. A second issue of which I became aware while serving on ARL's Special Collections Task force is that ARL was really reluctant to expand the scope (and hence the cost) of its existing data gathering effort.

There is a definite weakness in data gathering for special collections in ARL libraries (and elsewhere); we need metrics that provide useful measurements of our work, as we need metrics that are meaningful to our colleagues in other parts of ARL libraries. A tough combination to address.

I hope this is useful to you and your colleagues.

RESPONSE SIX: “The annual salary survey from ARL needs a review, too. The definition for subject specialist is limited to people who primarily do collection management. No titles for instruction or liaison...”

“Of the most interest to me would be capturing current, changing and best or innovative practices regarding the following themes you guys identified: Applications of technology -broader than social apps, etc.”

RESPONSE TWELVE: “I think it's critical that ARL Annual Statistics start to measure the emerging areas that progressive libraries are involved with and trying to grow.”

RESPONSE THIRTEEN: “I believe most if not all of the themes listed in your document are issues that are current and important, and if mechanisms could be implemented to collect and report this data it would be a big step for all the ARL libraries. However, I'm having trouble

envisioning how a library would report figures or stats for many of the themes as we do with ARL stats or supplementary stats. Some of themes might be included in the ARL Stats: development / fundraising / grants could certainly be quantitatively reported by dollar amounts; but how would a library report innovative renovations or staffing changes as an ARL stat? Those types of issues might be best served and described in a narrative format; so perhaps another annual survey instrument could be designed that paralleled the ARL Stats annual reporting? Or, could ARL combine the ARL Stats and Supplement to make just one survey (this seems to be what ARL has been doing over the past couple years anyway) that is basically the quantitative measurement; then use the Supplement form and revise it to accommodate the themes that cannot easily be quantified – more like an ongoing, condensed qualitative response to such things as data curation or efforts for collaborative collection building. “

RESPONSE SIXTEEN: “I do not know if the ARL Preservation statistics are being reviewed or not. If they are, perhaps asking about digital preservation efforts, and who is coordinating those efforts, would be very interesting. “

“Given the speed of technological change, I would say annual gathering is preferred.”

RESPONSE EIGHTEEN: “I'd like to see an area to enter stats on born digital items. ..., I entered stats in the preservation document, so I had to review the general ARL document. I really didn't see a place to enter info about born digital items. Here ..., we have a lot, and I'm sure [xxx] has the same. I'm sure y'all have dealt with that regarding ... stats, but I felt like it was important to mention it.”

RESPONSE NINETEEN: “As I reviewed your list, I find it very difficult to see any of those themes going beyond anything more than an occasional SPEC Kit.”

“Way to measure service points outside of the Library - such as hours held in campus departments or locations such as the Student Center by librarians.”

RESPONSE TWENTY-ONE: “I think your group has done terrific work. The themes you mention should help our library improve since our reputation has largely been built on emphasizing the things that are currently tracked by ARL, like collection size.

“I think it would be useful for *all* services to be captured by the qualitative profile, with emphasis on those that are unusual/reinvented. You touch on this in the "horizons" section. For each service, I'd like to know if the library is providing the service or if the library is simply providing space for an externally-run service. For each service, it would be great if we could capture the extent of the service, i.e., the press publishes 1000 volumes/year, the writing center provides 50 consultations/year.

- At ...State, the library is the only unit that provides technical support for course management systems. On most (all?) other campuses, this support is provided by the IT division. This unit is managed by librarians & staffed by clerical/student staff. 30,000 transactions/year.

- Utah's Books Arts Program.
- University press operations. You mention a component of press operations, digital publishing (OJS), but running the press as a whole can involve many other activities.
- Archives
- Writing Centers
- IT service desks
- Checkout of laptops, projectors, cameras, iPads, etc. To what extent? Thousands of checkouts/year? This may sound routine, but we do not circulate laptops at all, perhaps because we have 500+ desktop computers in the library.
- Academic advising
- Plotter/large-format printing support, scanning support
- Cafe/food services