

**Background of Presentation:**

The presentation outlined below discussed library metrics and methods of measurement strategies, as presented by Denise M. Davis, Director, American Library Association Office for Research and Statistics. This served as the Council session entitled, "Metrics and Measurements." This session outlined:

- Putting measurement in a context
- Standards that inform survey design and measurement
- Integrating performance measures, outcomes, "Balanced Scorecard" or other assessment tools (du jour)
- Depository Survey uses and improvements

Libraries have long collected output measures and evaluated themselves using these metrics. In fact, some have gone so far as to rank libraries on only a few output metrics. Expanding the universe of measures to integrate customer/user perspective and re-aligning inputs to assess performance takes many forms. The presentation outlined key performance initiatives and discussed the role of the NISO Standard Z39.7 in moving performance indicators forward in the U.S., as well as how to present results of the Biennial Survey of Depository Libraries in a context of performance.

**Metrics and Measurement: Moving from Outputs to Performance Indicators**

**Key Discussion Points -**

- Measurement for a reason
- Examples of metrics, traditional and electronic (E-metrics)
- Examples of tools and resources to expand FDL P survey value

**Background documentation –**

**Standards and best practices:**

- NISO Z39.7 [www.niso.org/emetrics](http://www.niso.org/emetrics) Bertot and McClure work  
[www.ii.fsu.edu/emis](http://www.ii.fsu.edu/emis) Association of Research Libraries (ARL)  
<http://www.arl.org/stats/newmeas/emetrics/>
- Project Counter <http://www.projectcounter.org/> Library Statistics & Performance Measures. Compiled by: Joe Ryan [jryan@mailbox.syr.edu](mailto:jryan@mailbox.syr.edu)  
<http://web.syr.edu/~jryan/infopro/statopic.html#Balance>

## Outcomes Measurement

- Bond, Sally L., Boyd, Sally E., and Rapp, Kathleen A. (1997). *Taking stock: A practical guide to evaluating your own programs*. Chapel Hill, N.C.: Horizon Research, Inc.
- Institute for Museum and Library Services (IMLS). *Outcome Based Evaluation*. <http://www.imls.gov/applicants/overview.shtm>
- Smith, Ken R. *Higher Education Outcomes (HEO) Research Review*. Sponsored by Association of Research Libraries (ARL). <http://www.arl.org/stats/newmeas/heo.html>
- Childers, Thomas & Van House, Nancy A. (1993). *What's good? Describing your public library's effectiveness*. Chicago: American Library Association. 93 p. ISBN 0838906176.
- Powell, Ronald R. (1992, July-September). Impact assessment of university libraries: A Consideration of issues and research methodologies. *Library and Information Science Research*, 14 (3), 245-257.
- Listing of Research Related to Library Value (Return on Investment). Compiled by Denise M. Davis <http://www.ala.org/ala/ors/reports/roi.htm> ARL LibQUAL+
- Cotta-Schønberg, Michael. (1995). *Performance measurement in the context of quality management*. 1st Northumbria Conference on Performance Measurement. Also available via ERIC: ED405866
- Hernon, Peter and Whitman, John R. (2000). *Delivering satisfaction and service quality: A Customer-based approach for libraries*. Chicago: American Library Association.

## Summary:

GPO is investigating improving its biennial questionnaire to capture information to inform the program about its improvements in dissemination and impact. This presentation outlined areas in the existing survey warranting attention, and ways to position the biennial survey to leverage other data sets - yielding more robust analysis opportunities for the FDLP.

## Q&A Summary

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Tuesday, April 4, 2006. 1:30-3:00 PM

### **Question 1:**

**Balanced Scorecard method of benchmarking and its value to libraries.**

#### **Summarized Responses:**

- The balanced scorecard tool needs to be used with caution – detailed planning and use of prior data are important in setting benchmarks.
- Use the tool in context for your institution.

### **Question 2:**

In the context of what we're supposed to be doing as depository library, what is per capita?

#### **Summarized Responses:**

- Per capita is the population that you serve.
- It's either a population of a legal service area as a public library or as full-time enrolled students and faculty if it's an academic institution. And if it's K through 12, which it isn't, that would be student enrollment and teachers, so it's very clear. It's not the state population.
- It's not about who you think you serve. It's about who pays for service from your institution. So it's either a taxpayer or it's a student or a faculty member.

### **Question 3:**

3(a) Reporting on aggregate might be better, particularly in this case. Why should we worry about numbers in our institutions if they're limited by how we define our demographics in other surveys? But if we combined every institution in that state, then you've got a better per capita.

3(b) You were saying that if we use that kind of common definition, we might also be able to add an additional metric for other populations beyond that -- so that we could do both. We could put the data in the context but we could also capture the fact that as depositories, these institutions are serving a broader population.

#### **Summarized Responses:**

- You'd have a more realistic per capita. You'd have some duplication (because you have instate students, and they'd be measured twice), but an aggregated measure – for the purposes of the FDLP - is a much better metric.

### **Question 4:**

In your experience in looking at surveys, have you looked at surveys that are initiated by other depository programs internationally (e.g., EU, WTO, Canada)?

**Summarized Responses:**

- The national libraries collect information about those depository collections, the foreign national libraries.
- International Standards Organization (ISO) sets the definitions for what is reported.
- Hybrid collection portal (outside of UNESCO) is LibEcon ([www.libecon.org](http://www.libecon.org)).

**Question 5:**

Congressional districts to identify service areas?

**Summarized Responses:**

- There are a couple of tools you can use. Christy Koontz from Florida State University did some work for ALA last year as a part of CapWiz project, and we had her map congressional districts and plug in public libraries.

**Question 6:**

Are you aware, from your position within ALA, of anybody who's having some success with this sort of software, like WebTrends, to develop a profile of activity on their websites?

**Summarized Responses:**

- Houston Public Library has done an enormous amount of work using Weblog analysis, and they've done it for a number of years.
- Another library to contact is the Oregon State Library.

**Question 7:**

7(a) I just want to think a little bit about the collection aspects of the kind of data that you're talking about. And specifically, I guess, usage statistics. So I guess I think it's just an interesting question for all of us to be talking about as to what we think the demonstrable product or outcome of the data would be and whether or not it's ultimately going to support the case that we're trying to make.

7(b) As I see surveys evolving, there seems to be so much more emphasis counting in some way what we're doing with electronic information rather than being media neutral and counting what we do with access to information.

**Summarized Responses:**

- What does it mean to provide access? And, in the case of what is happening with GPO where the content is moving to digital open access, anybody can go.
- The question that you need to be asking is who are we serving and how are we serving them?
- The pressure is really on GPO at some level to report back to you as their customer what happened between your computer and their computer.

**Follow-Up Information:**

Discussions will continue with Council and GPO staff.