From the 134th ARL Membership Meeting

Agenda

ARL Committee on Statistics and Measurement

Wednesday, May 12, 1999

8:00 a.m. - 11:00 a.m.

Pavilion VII, Ritz Carlton Hotel, Kansas City, MO

Note: The parenthetical times shown are estimates only to aid in moving the meeting along. If an issue warrants, we will take as much time as necessary.

1. Introductions and Overview: (5 minutes)

2. Approval of Minutes and Feedback on the 1999 Program Plan for the ARL Statistics and Measurement Program: (10 minutes)

Attachment 2a: Minutes of the Meeting of the ARL Statistics and Measurement Committee, October 14, 1998

Attachment 2b: ARL Statistics and Measurement Program summary from 1999 ARL Program Plan

Outcome: Approval of minutes; feedback on 1999 priorities

3. New Measures: (75 minutes)

A review of developments in new measures and action items for this committee.

Attachment 3a: Summary of January 1999 retreat and issue papers

Outcome: Identification of next steps

*** Break 9:30– 9:45 ***

4. Annual Projects Update and Discussion: (35 minutes)

Status report on the annual surveys and opportunity for discussion.

(a) ARL Annual Salary Survey

Attachment 4a: Letter from Mary Jo Lynch, ALA, with survey attachment.

(1) Request for addition to ARL Salary Survey from American Library Association for ALA Survey of Librarian's Salary

ALA's Office for Research and Statistics compiles an annual survey of librarian salaries. On behalf of member libraries that are selected as part of the sample for inclusion in the ALA survey, ARL submits data from the ARL file to ALA for inclusion in their dataset. The ALA survey was revised this year to focus on the nature of responsibility of positions, which is not reflected in the data ARL collects. ALA is asking if ARL would consider the addition of a field to the ARL salary survey that would provide the necessary data.

(2) OMB Revision on Standards for the Classification of Federal Data on Race and Ethnicity

Implementation on the new classification on race and ethnicity is imminent.

The federal government will use the new definitions in the 2000 Census and every federal agency will have to adopt the new definitions by 2003. To accommodate these new classifications, ARL’s salary survey questionnaire will need revision and survey coordinators will need to prepare to begin to gather the new data. A strategy for adopting the new classification and for implementing the data collection is proposed.

Attachment 4b: Strategy for adoption of new OMB classification
Attachment 4c: Revised ARL Annual Salary Survey form

Outcome: Endorsement of strategy

(b) ARL Statistics: The annual statistics were delivered from the printer May 6 and are being distributed to members and subscribers.

(c) ARL Academic Law and Medical Library Statistics: Data verification is nearly complete for the law and medical statistics and publication production will be completed by the end of May.

(d) ARL Supplementary Statistics: Data verification is in process and a report will be prepared at the end of May.

(e) ARL Preservation Statistics: Data verification is in process and publication is expected towards the end of June.

(f) Library Expenditures as a Percent of E&G University Expenditures: Preparation for data collection for 1997/98 is in process. This will be a web-based data collection.

(g) Developing Indicators for Academic Library Performance: Ratios from the ARL Statistics: The ratios are produced late in the summer and published in September. Custom reports (including multi-year tables) are prepared for several institutions.

5. ARL Data Use in Commercial Products: (10 minutes)

Management Dynamics, Inc., is a company developing and marketing statistical tools for libraries. They have asked if ARL would release member statistical data to include in their commercial products. There is no policy statement on use of ARL statistical data by commercial firms.

Attachment 5a: Company information

Outcome: Policy decision on use of ARL data in commercial products and services.

6. Workshops: (5 minutes)

Report on workshops held to date and suggestions for future activities.

(a) Electronic Publishing of Datasets on the WWW: The first of these workshops for 1999 was held at the University of Virginia in March.

(b) User Surveys: Planning for a revised workshop will be taking place this summer.

(c) Culture of Assessment: This proposed workshop topic is being explored with OLMS.

7. Statistics Program Web Pages: (5 minutes)

Attachment 7a: Selected web pages

8. Report of Relations with External Constituencies: (5 minutes)

(a) IPEDS Academic Libraries Advisory Committee: A recommendation has come to the NCES to conduct the IPEDS Academic Library Survey yearly and to use web-based collection forms. This recommendation is welcome because it signals within IPEDS the importance of the survey and will also contribute to a more rapid dissemination of the collected data.

(b) SCONUL: Martha Kyrillidou will be attending a SCONUL meeting in May to talk with their statistics committee about common interests in library measures.

(c) National Postsecondary Education Cooperative
(d) National Consortium for Continuous Improvement: Individuals involved with performance measures and quality initiatives within higher education have proposed the establishment of a National Consortium for Continuous Improvement (NCCI). Julia Blixrud attended the organizing meeting.

Attachment 8a: NCCI descriptive summary (draft document).

9. **Information Items: (15 minutes)**

(a) ARL survey coordinators meetings

January 29, 1999 (Philadelphia, PA)

June 25, 1999 (New Orleans, LA)

(b) ACRL: A statistical survey, similar to ARL's, was conducted by ACRL this spring. Some ARL members expressed concern about duplication of data gathering.

(c) IFLA Section on Statistics: The acting chair of the section, Wanda Dole, has asked for a paper on the ARL Statistics program to be given at the 2001 Boston IFLA. She has also noted there will be open slots for members in the section and encourages ARL member participation.

(d) Recognition of Kendon Stubbs: Kendon Stubbs has resigned his role as consultant to the Statistics Committee and to ARL's Statistics Program. A recognition of his contributions to the understanding and appreciation of statistics for ARL libraries is being planned for the Fall 1999 meeting.
Minutes of the
ARL Committee on Statistics and Measurement

Wednesday, October 14, 1998
8:00 a.m. - 11:00 a.m.
New York Room, Marriott at Metro Center Hotel, Washington, DC

Committee Members Present:
Martha Alexander, University of Missouri
Claude Bonnelly, Laval University
Ronald F. Dow, University of Rochester
Cliff Haka, Michigan State University
Susan Martin, Georgetown University
Carolynne Presser, University of Manitoba
Dana Rooks, University of Houston
William J. Studer, Ohio State University
Carla Stoffle, Chair, University of Arizona, Chair
Julia Blixrud, ARL

Guests:
Paul Kobulnicky, University of Connecticut, (Chair, ARL Leadership and Management Committee)
Jennifer Cargill, Louisiana State University
Joyce Garnett, University of Western Ontario
William Gosling, University of Michigan
Jennifer Younger, University of Notre Dame

Introductions and Approval of Minutes and Feedback on the 1998 Activities Report for the ARL Statistics and Measurement Program

Carla Stoffle, Committee Chair, convened the meeting and welcomed Committee members and guests. Sue Martin moved approval of the minutes, Martha Alexander seconded, and the minutes were approved. Program activities since the last meeting were described.

Performance Measures Projects:

The Committee spent considerable time discussing several items included with the agenda. These items were a mix of projects and activities addressing performance measures.

(a) Technical Services Costs Study:
Dilys Morris, Iowa State University, has been working on a 5-institution technical cost study that includes an analysis of time and costs for several functions: ordering, cataloging, catalog maintenance, volume preparation and preservation, conversion or other major project work. The study includes the use of specially developed software. The Committee felt this was not of interest to them at this time. Many have already done this kind of analysis and have moved to outsourcing some technical services functions. While some agreed that the project was interesting, addressed to some extent best practices, and could be of benefit to some of our members, the Committee's interest now was more towards outcomes.

(b) ACRL Task Force on Academic Libraries Outcomes Assessment:
An ACRL Task Force studied the topic of outcomes assessment for academic libraries and prepared a report, which was accepted by the ACRL Board at the 1998 Annual meeting. Committee members felt this report was not particularly useful. It lacked emphasis on student and undergraduate learning and was missing some major assessment articles in the bibliography.
It was acknowledged that the report had an accreditation focus and that was part of the intent of the task force charge.

(c) ICOLC Guidelines for Statistical Measures of Usage of Web-Based Resources:
The International Coalition of Library Consortia has been developing a set of guidelines that would establish a basic set of requirements for electronic product usage data. Committee members discussed whether these were measures that could be incorporated into ARL's supplementary statistics questionnaire and determined that the project deserves close monitoring, but made no recommendation for action at this time.

(d) CLIR Publications addressing ARL Statistics and performance measures:
Two items, a research brief and a book chapter, recently issued by the Council on Library and Information Resources include references to ARL statistics and encourage the development of new measures. The Committee members discussed each of the reports, which led to a more general discussion of what is happening in the field of measures.

Performance Measures Retreat:
At the meeting in May 1998, committee members had recommended holding a retreat to discuss performance measures. Subsequent staff discussions over the summer and possible funding have led to planning for a larger meeting. The Committee discussed the idea of a summit, but generally agreed that we were not ready for a larger effort and would prefer that a more targeted retreat be held first. A lengthy discussion ensued on what kind of meeting should be held, what topics should be covered, what issues were the most important, what measures were the most critical. Committee members agreed to move forward with some kind of a retreat in which at least three discussion topics could be pursued: what measures define research libraries (is another measure needed for membership); how can we assess the library's local impact (is there a way to identify outcomes); and what data should be collected for benchmarking purposes (are their specific service areas to measure performance). Staff will work with the Committee Chair to develop a possible agenda, time, and location.

ARL Index:
Questions about the ARL Index come up frequently. A mailing was sent to directors with information on the background and issues surrounding the ARL index. Committee members commented that the mailing was helpful in understanding the index and recommended no other action at this time. It was observed that the Index was a membership issue and should be considered by the ARL Board.

Review of Annual Projects:
Julia Blixrud provided a brief review of the status on the annual surveys on behalf of Martha Kyrillidou and the Statistics Program. She noted the addition of demographic data collection for the salary survey and the identification of a pre-existing document regarding volume counts for remote storage items. Committee members did not see the need to revise that document at this time. Ms. Blixrud noted that the clarification about counting electronic journals may change some serial counts. The Committee was asked about establishing categories to describe article budgets, but agreed to wait on this as new measures are investigated. It could be put on a Survey Coordinator agenda as a topic for discussion, however. Ms. Blixrud noted that optional data will once again be collected for digital preservation.

One action item was that a slight change may need to be made in the E&G data as a result of the changes to IPEDS finance form. An email from Paul Mosher noted that expenditures for hospital services could skew some library's percentages and staff were instructed to take his message into consideration as next year's data collection instrument was developed.

Report on Electronic Expenditures:
Tim Jewell, ARL Visiting Program Officer, has nearly completed work on the CLIR-funded project to investigate the investments libraries are making in electronic resources. A report will be distributed by the end of the year.

Workshops:
The Statistics Program continues to see success with its workshop on Electronic Publishing of Datasets on the WWW. Interest in user surveys is high and staff were encouraged to develop a revised user survey workshop and to examine other areas for training.

Statistics Program Web Pages:
Highlights of the changes made to both the ARL Statistics Program web site and the interactive data site at the University of Virginia were provided to Committee members.

Relations with External Constituencies:
Julia Blixrud noted that the ARL Statistics Program maintains contact with many external organizations. In particular, the IPEDS Academic Libraries Advisory Committee is also grappling with the issues of measures for electronic resources and has been following ARL's work closely.
Information Items:

Several information items were noted: ARL survey coordinators meetings, the upcoming ALA Survey of Librarian’s Salaries, the ACRL survey will be gathered over the WWW and will be based on ARL’s instrument, a committee is revising ISO 2789, the international standard on library statistics.

Committee members were alerted to an advertisement from Primary Research Group, which advertises a budget and expenditure report for academic libraries. Previous investigation about this group reveals no information about the principal investigators and a review of a previous edition of this work indicates it is lacking in quality and reliability.