To: ARL Statistics and Measurement Committee

Martha Alexander, University of Missouri
Claude Bonnelly, Laval University
Ronald F. Dow, University of Rochester
Cliff Haka, Michigan State University
Eileen Hitchingham, Virginia Tech
Ellen Hoffman, York University
Susan Martin, Georgetown University
William G. Potter, University of Georgia
Carolynne Presser, University of Manitoba
Dana Rooks, University of Houston
Sherrie Schmidt, Arizona State University

Guests:

Jennifer Cargill, Louisiana State University
Joanne Eustis, Case Western Reserve University
Joyce Garnett, University of Western Ontario
Bill Gosling, University of Michigan
Paul Kobulnicky, University of Connecticut
          (Chair, ARL Leadership and Management Committee)
Mod Mekkawi, Howard University
Sarah Pritchard, University of California-Santa Barbara
Paul Wiens, Queen’s University
Jennifer Younger, University of Notre Dame

From: Carla Stoffle, Chair, University of Arizona
     Julia Blixrud, Director of Information Services, ARL
     Martha Kyrillidou, Senior Program Officer for Statistics and Measurement, ARL

Enclosed are the agenda and supporting documents for the ARL Statistics and Measurement Committee meeting that will take place from 9:00 a.m. to 11:30 a.m. on Wednesday, October 13, 1999, in Meeting Room 3014 of the Washington Marriott Hotel, Washington, DC.

The major part of the meeting will focus again on our interest in new measures, and in particular the identification of target issues and defining an action agenda for this initiative. Since our last meeting, some project ideas have emerged and we will use meeting time to discuss them. As part of that discussion, we ask committee members and guests to think about significant cost drivers in their libraries. Those that emerge as priorities from among us would be the most promising areas to investigate as one of these new projects.

Thank you for your interest and participation in the work of this committee. We look forward to a productive meeting.
enclosures
AGENDA

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 Activities Report for the ARL Statistics and Measurement Program (5 minutes)**

   Attachment 2a: Minutes of the Meeting of the ARL Statistics and Measurement Committee, May

   Attachment 2b: ARL Statistics and Measurement activities from 1999 ARL Activities Report

   Outcome: Approval of minutes; feedback on 1999 activities

3. **New Measures (90 minutes)**

   Since the May meeting, several ideas for specific projects that address new measures have emerged. Each idea will be raised for discussion and questions to be answered include: should the project be supported and, if so, how; what are the next steps to be taken; what timeline and deliverables should be established; what funding support is necessary and how can that funding be obtained.

   Organizers of the Northumbria conference on performance measures have asked ARL to help organize and sponsor a conference on performance measures prior to the IFLA 2001 meeting in Boston. Vicky Coleman, University of Kansas, attended the recent Northumbria conference and will provide a brief report of the conference.

   Martha Kyrillidou met with members of the SCONUL statistics committee in May 1999 to talk about common interests in library measures.

   Attachment 3a: Status report on the new measures initiative
4. Annual Projects Update and Discussion *(5 minutes)*

Status report on the annual surveys and opportunity for questions and discussion.

(a) *ARL Annual Salary Survey*

85-90 percent of institutions have submitted their 1999/2000 survey. Stanley Wilder is analyzing the 1998/99 supplementary data for updating of his work on age demographics.

(b) *ARL Statistics*

Data collection for 1998/99 has begun.

(c) *ARL Academic Law and Medical Library Statistics*

The 1997/98 publication was published and distributed this summer. Data collection for 1998/99 has begun.

(d) *ARL Supplementary Statistics*

Data verification for 1997/98 has been completed and a report is in production. Data collection for 1998/99 has begun.

(e) *ARL Preservation Statistics*

The 1997/98 publication is in production. Data collection for 1998/99 has begun.

(f) Library Expenditures as a Percent of E&G University Expenditures

Some data has been collected for 1996/97 but with the change to the IPEDS forms, no formal report has been planned. Data collected to date is available to members as an excel spreadsheet.
(g) Developing Indicators for Academic Library Performance: Ratios from the ARL Statistics

The ratios for 1997/98 will be produced late this fall. Custom reports (including multi-year tables) also are prepared for several institutions.

(h) Statistics Program Web Pages

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

A task force has been established to examine this issue and provide a recommendation for ARL Board approval.

6. Workshops (10 minutes)

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

(a) Electronic Publishing of Datasets on the WWW

A workshop is scheduled for November 11-13, 1999, at the University of Virginia.

(b) Role of Assessment in Advancing Diversity for Libraries

Martha Kyrillidou, Julia Blixrud, DeEtta Jones, and Trish Rosseel are developing an online course (based on a previous two-day onsite program) that will be given in early December as part of the OLMS Online Lyceum. (Brochures will be available at the meeting.)

(c) Building a Culture of Assessment in Libraries

This topic is being developed by OLMS as a short, interactive workshop that will address the organizational changes needed by libraries that want to build systematic assessment and evaluation processes.

(d) User Surveys

This former onsite workshop is also being considered as an online training event for 2000.

(e) Performance Measures

Preliminary conversations have been held with Danuta Nitecki for developing a workshop on service quality as part of the OLMS Online Lyceum program.

7. Report of Relations with External Constituencies (5 minutes)
(a) **IPEDS Academic Libraries Advisory Committee**

The summer meeting focused on the difficulties of gathering data for electronic resources. The IPEDS state coordinators indicated this is a major area of concern for many of their libraries and they are looking to the Committee for guidance in constructing appropriate measures.

(b) **National Postsecondary Education Cooperative**

(c) **National Consortium for Continuous Improvement**

8. **Information Items (5 minutes)**

(a) **ARL survey coordinators meetings**

   June 25, 1999 (New Orleans, LA) – no meeting held
   January 14-15, 2000 (San Antonio, TX) – agenda to include meeting on counting e-resources, and a workshop for new coordinators

(b) **ACRL Statistics**

(c) **IFLA Section on Statistics**

   A paper on the ARL Statistics program has been invited for delivery at IFLA 2001 to be held in Boston.

   Attachment 8: IFLA Meeting Summary by Wanda Dole

(d) **Recognition of Kendon Stubbs**

   Kendon Stubbs has resigned his role as consultant to the Statistics Committee and to ARL's Statistics Program. A web site to recognize his contributions to the understanding and appreciation of statistics for ARL libraries is being developed and a token of appreciation from ARL is being prepared.
Committee Members Present:
  Claude Bonnelly, Laval University
  Cliff Haka, Michigan State University
  Eileen Hitchingham, Virginia Tech
  Ellen Hoffman, York University
  Carolynne Presser, University of Manitoba
  Dana Rooks, University of Houston
  Carla Stoffle, Chair, University of Arizona
  Julia Blixrud, ARL

Guests:
  Jennifer Cargill, Louisiana State University
  Cindy Dobson, Iowa State
  Bill Gosling, University of Michigan
  Paul Kobulnicky, University of Connecticut
    (Chair, ARL Leadership and Management Committee)
  Mod Mekkawi, Howard University
  William J. Studer, Ohio State University

Introductions; Approval of Minutes; Feedback on the 1999 Program Plan for the ARL Statistics and Measurement Program

  Carla Stoffle, Committee Chair, convened the meeting and welcomed Committee members and guests. Introductions were made. Cliff Haka moved approval of the minutes of the previous meeting, Paul Kobulnicky provided a second and the minutes were approved by all present. There were no comments on the ARL Program Plan summary.

New Measures

  In order to develop an agenda to address new measures in research libraries, a facilitated retreat was held in Tucson, AZ, in January 1999. Participants included members of the Statistics and Leadership committees, as well as others interested in new measures. Results of the retreat had been communicated through the establishment of an electronic list, the development of a web site, and through the generation of some white papers on the topics identified as promising areas of interest. Those who attended the event shared their experience and the group engaged in a discussion of the results of the retreat. To determine interest in new measures from the rest of the ARL community, a luncheon meeting would be held at this ARL membership meeting to introduce ARL member leaders to the new measures initiative. Committee members discussed how best to structure the luncheon presentations and what information should be gathered when the formal presentations were over and table discussions began.
The Committee members then turned their attention to a review of the white papers. The purpose of the papers was reviewed and those present volunteered to provide feedback to the authors. The group agreed that much more work needed to be done before specific actions could be taken in most of the areas, but the lunch discussions would be most helpful in targeting those topics that were considered more important by the larger membership.

The Committee also spent time discussing what activities might take place that could help to move the new measures agenda forward. It was agreed that in many of the areas, more expert help was needed. It was suggested that for some topics, a structured meeting could be held. Since not all areas had papers, an initial step would be to get at least a rough draft for comment. Other suggestions were made of institutions or individuals working in the area of performance, assessment, and measures that would be useful contacts for this initiative.

Committee members were tasked to both review the existing white papers and provide feedback to the authors so revisions could be made, and to gather reactions from the full membership about the areas of interest to determine where the association might best direct its attention.

**Request from American Library Association for addition of fields to ARL Salary Survey for ALA Survey of Librarian's Salaries**

ALA's Office for Research and Statistics compiles an annual survey of librarian salaries and on behalf of ARL libraries that are part of the representative sample, 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 sent a letter to ARL requesting the addition of a field to the ARL salary survey that would provide the necessary data. The committee members felt that the burden of collection would be more than the value received and recommended that the addition not be made. Julia Blixrud will convey this decision to ALA.

**OMB Revision on Standards for the Classification of Federal Data on Race and Ethnicity**

The implementation of the new classification on race and ethnicity has begun. 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 definitions, ARL staff prepared a strategy for adopting the new classification and for implementing the data collection. The Committee members noted that many institutions would be unable to collect the data this year, but encouraged ARL staff to provide the necessary information so their human resources offices could be alerted to the changes and begin their local planning to gather the data.

**Update on ARL Statistical Surveys**

Julia Blixrud provided a status report on the data gathering and production of the various statistical surveys. Committee members confirmed the value of the electronic data in conducting local analyses.

**Use of ARL Data in Commercial Products**

Management Dynamics, Inc., a company developing and marketing statistical tools for libraries, 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. The Association does have a copyright statement for use of publications (and presumably data) and there had been specific agreements in the past regarding use of salary survey by researchers. After some deliberation, the Committee referred this question to the Board for their action.

**Workshops**

The ARL Statistics and Measurement Program continues its workshop offerings. An emerging opportunity is the development of online courses in conjunction with the OLMS Online Lyceum program.

**Relations with External Constituencies**

In addition to the regular groups with which ARL maintains affiliation, a new group has been established and ARL was part of the organizational meeting. The National Consortium for Continuous Improvement is comprised of individuals involved with performance measures and quality initiatives within higher education. NACUBO provides administrative support for the group.

**Information Items**

The acting chair of the IFLA Section on Statistics, Wanda Dole, has asked for a paper on the ARL Statistics program to be given at the 2001 Boston IFLA.

The ARL Statistics Program will again provide support to the data collection and production of the American Association of Law Libraries salary survey. This is a contractual project with AALL.

A recognition of the contributions by Kendon Stubbs to the understanding and appreciation of statistics is planned. Kendon resigned his role as consultant to the Statistics Committee and to ARL’s Statistics Program.
1999 ARL Activities Report

5.1 Statistics and Measurement

http://www.arl.org/arl/activities/stat.html
New Measures Status Report

BACKGROUND

The ARL Statistics and Measurement Committee and the ARL Research Library Leadership and Management Committee continue their investigation into new measures. Using the results of the retreat on this topic in January 1999, ARL is advancing a broad-based and ambitious agenda. This effort includes identifying strategic areas of interest in which the Association could address concerns about the reliance of current descriptive measures that do not tell the full story of the value of research libraries.

The 1999 retreat identified eight areas of interest and individuals at the retreat took responsibility to develop draft white papers that would take the areas and expand on their possibility for further work. The areas are:

- Ease and Breadth of Access
- User Satisfaction
- Library Impact on Teaching and Learning
- Library Impact on Research
- Cost Effectiveness of Library Operations and Services
- Library Facilities and Space
- Market Penetration
- Organizational Capacity Ability

The papers represent an initial attempt to take the ideas represented at the retreat a few steps further by identifying possible promising areas of investigation. A web site for the new measures initiative [http://www.arl.org/stats/newmeas.html](http://www.arl.org/stats/newmeas.html) provided a location for posting these initial drafts for comment by the community (the topics in bold have papers). No further work has been done with the papers. In addition, an electronic list was established for retreat participants and has been expanded to others interested in the development of new measures.

The eight areas of interest were tested with the larger ARL community at the May 1999 meeting of both committees and at a luncheon meeting hosted for the full membership. The general sense emerging from these several membership discussions and subsequently with other interested experts in the profession, is that these areas are of urgent concern to the future of research libraries, and an action agenda should be advanced allowing the Association to successfully engage the challenges identified. It was also recognized that ARL should make every effort to build on the expertise and experience present both within research libraries as well as in comparable venues.

CURRENT SITUATION

Since the May meeting, member leaders and others both interested and expert in measures have identified some target areas for action: the library impact on learning and research objectives of the academy; the utility of service effectiveness measures currently
underdevelopment; areas of library operations calling for reviews of their cost effectiveness; building on the experience of the ILL/DD studies and measures to support library development; and securing a better understanding of how electronic information resources are used. While some activities in support of these emerging target areas can be initiated within the limited staff and committee resources, there will be a need for additional assistance from ARL members, other agencies sharing these interests, and foundations. Also, a structural basis for advancing any of the ideas needs to be established (e.g., specific or joint committee assignments, task forces, contracted work). Target areas to be considered include:

1. **Developing a fuller understanding of outcomes research at the university level and the relationship of emerging library roles and contributions**

   This topic was discussed at the recent ARL/OCLC Strategic Issues Forum and discussions have been held with the Council on Library and Information Resources (CLIR) President concerning the possibility of a partnership to explore it. This partnership could engage a project investigator on staff at CLIR to prepare a paper that will provide our community with an understanding of current efforts in outcomes assessment in higher education, especially in the areas of research and teaching. The intent of this investigation is to learn if there is new or emerging research in these topics, what other organizations are involved, who might be available to work with ARL in any of the areas, and how that work could be accomplished.

   The outcome of this investigation would provide ARL with a framework of higher education outcomes in which to develop the tools to describe and measure library services.

2. **Conducting demonstration studies of the utility of service effectiveness measures readily available**

   Texas A&M University Libraries has proposed a two-year pilot project to demonstrate the utility of the SERVQUAL instrument in a variety of research library environments. SERVQUAL is a statistical device that measures the difference between minimum expectations of the clients on a range of library dimensions and the perceived delivery of those services. At the local library level, this device allows management to determine those areas where it best meets user expectations and to detect where it may have problems when perceived delivery approaches minimums or perhaps even falls outside the zone of tolerance. Management may then concentrate its energies and resources on correcting the deficits. Pilot libraries would administer the instrument; evaluate their results; and seek among the cohort examples of best practices that may assist with correcting locally identified deficits. If successful, the SERVQUAL instrument would be operated by ARL for member libraries and a database of best practices maintained to support local development efforts.

3. **Identify areas of library operations calling for reviews of their cost effectiveness**
With the success of the ARL cost and performance studies of Interlibrary Loan and Document Delivery Services, a number of suggestions have been made to identify other library functions that are seen as cost-drivers and should be addressed in a similar fashion. This topic is on the agenda for both the Statistics and the Leadership Committees at their meetings this week.

4. Develop an assisted self-study program applying the results of the ILL/DD studies

The ARL Access Committee has expressed interest in securing support to apply lessons learned from the ILL/DD cost and performance studies, the several ILL/DD workshops, and a variety of organizational experience in redesigning and reengineering ILL/DD. This may take the form of preparing a self-study manual and process that could be applied by a larger number of libraries.

5. Conduct a workshop to secure a better understanding of how electronic information resources are used

It is apparent that work in academic libraries in England, in the US with public libraries, and in a variety of library schools is starting to identify elements that usefully describe the nature of user access to electronic information. An invitational workshop could bring together key ARL member library leaders with a panel of experts to inventory available measures and assess the utility and desirability of applying these measures more broadly in the research library environment.

ONGOING ACTIVITIES

In addition to these distinct project ideas, ARL staff continue their work with organizations such as NCES/IPEDS, ALA and ACRL, NACUBO and the National Consortium for Continuous Improvement (NCCI), CNI, SCONUL, CAUL, and others both nationally and internationally that have an interest in measures. Individuals who attended the recent Northumbria International Conference on Performance Measurement in Libraries and Information Services will provide an update on the conference, and the Northumbria organizers have asked ARL to co-sponsor an international multi-center teleconference on performance measurement in conjunction with IFLA 2001.

JCB and DEW 10/5/99
JCB and CS revised 10/8/99
\textit{Amos Lakos, University of Waterloo - 09 October 1999}

The theme of the \textit{3rd} Northumbria International Conference was “Value and Impact” of performance measurement activities in libraries. The conference, sponsored by the Department of Information and Library Management at the University of Northumbria at Newcastle, took place on August 26 to 31, 1999, at Longhirst Hall, just north of Newcastle upon Tyne. This event follows upon the two earlier successful conferences, also sponsored by Northumbria. (Proceedings to the earlier conferences are still relevant and are available from Information North. Information North will publish the current conference proceedings in early 2000 for the Department of Information and Library Management, University of Northumbria at Newcastle.) All told there were 43 papers presented, including four Keynote Speakers and four Invited Speakers. The published proceedings will include 45 papers (two presenters could not attend).

The organizers firmly believed that in the two years since the last conference in 1997 there has been more than enough research and practice of performance measurement in libraries to justify a new conference. The conference aims were to provide a venue for discussing various library measurements and assessment issues and activities, to exchange experiences, to increase awareness of current research and to identify issues for further study and work. The goal was to focus on values and ways to translate them into outcomes and impacts.

The papers reflected the emphasis on assessing values and identifying and assessing outcomes and impacts of library services. Some major themes are emerging: defining and measuring value of libraries; defining network indicators and developing comparative networked services indicators; implementing the “balanced scorecard” approach in libraries; benchmarking activities; developing “best practices”; management information services; defining service quality indicators and applying SERVQUAL; using outcomes to assess team and individual performance; government interest in library performance measures; activity based costing; process management and more.

In Europe, increased cooperation between libraries across national boundaries is continuing, usually with European Union support. An emerging trend is that governments are insisting on some demonstrated positive outcomes and accountability from local governments and educational institutions, and by implication from libraries. The profession is scrambling to develop meaningful and comparable networked services indicators. The trend from quantitative measures toward qualitative impact measures is continuing.

Total attendance was 137 persons from 27 countries - a truly international gathering – and a list of participants is available. US participation increased from 6 to 16 and the Canadian participation remains at 3. Almost all were from ARL member libraries and there were several presentations given by North American participants with relevance to academic libraries:

\textbf{Keynote Presentations:}

\footnote{1 Proceedings of the earlier Northumbria Conferences: \url{http://ilm.unn.ac.uk/pm3procs.html}}

\footnote{2 Conference Delegate List: \url{http://ilm.unn.ac.uk/dels.pdf}}
Charles McClure, (Florida State University), "Issues and Strategies for Developing National Statistics and Performance Measures for Library Networked Services and Resources."

Invited Speakers:


Presentations:

Shelley Phipps and Carrie Russell, (University of Arizona), "Performance Measurement as a Methodology for Assessing Team and Individual Performance."

Carolyn Radcliff, (Kent State University), "Benchmarking with the Wisconsin/Ohio Reference Evaluation Program."

Amos Lakos, (University of Waterloo), "Implementing a Library Management Information System: Update and Lessons from the TriUniversity Group of Libraries Experience."

Vicki Coleman, (University of Kansas), Colleen Cook and Fred M. Heath, (Texas A & M University): Panel Presentation - "SERVQUAL: A Client-Based Approach to Developing Performance Indicators."

Josephine Kibbee and Jennifer L. Ward, (University of Illinois at Urbana-Champaign), “Assessing and Addressing User Reactions to a New Public Access Catalog.”

Marjorie Murfin (Ohio State University) and Michael Havener (University of Rhode Island), “Perceived Value, Importance and Impact of Information: How are They Related? How Do They Influence the Reference Transaction?”

A new international journal was launched at the Conference. Performance Measurement and Metrics: The International Journal for Library and Information Services. (ISSN 1467 8047) will be published by Aslib. It will focus on library performance measurement and assessment activities. There will be three issues a year. Subscription rates are £65/$99, with 20% discount to Aslib Corporate Members. The journal has an international editorial board, including Joan Stein, from Carnegie Mellon University. A sample issue (August 1999) is being sent to libraries and other interested venues. It includes an opinion piece by Amos Lakos, articles by Rowena Cullen, Dr. Roswitha Poll and Joan Stein, reviews and EndNotes.
PERFORMANCE MEASUREMENT OF U.K. UNIVERSITY LIBRARIES

by Ian Winkworth, Chair, SCONUL Advisory Committee on Performance Indicators, and Director of Information Services, University of Northumbria at Newcastle

This article summarizes current activity in measuring the performance of United Kingdom university libraries, focusing particularly on work with Government and with university representative bodies.

Just like their U.S. cousins, United Kingdom university libraries have a long tradition of collecting and publishing comparative library statistics. The association that represents all 135 U.K. university libraries and national research libraries, the Standing Conference of National and University Libraries (SCONUL), publishes an annual volume of statistics on member library inputs, throughputs, and outputs. Additionally, in recent years, the Higher Education Colleges Learning Resources Group (HCLRG) has collected and published a smaller set of data for most higher education college libraries in England, Wales, and Scotland, based on the SCONUL definitions (see <http://www.hclrg.ac.uk/>).

For the past ten years, the SCONUL data have been brought together in a database for trend analyses over time. This work, and production of the annual statistics publication, has been contracted to a specialist agency—the Library and Information Statistics Unit (LISU) at Loughborough University—that also handles the aforementioned HCLRG data as well as data about U.K. public libraries. More information about LISU and its publications, which cover all types of U.K. libraries, is available on LISU’s website at <http://www.lboro.ac.uk/departments/dils/lisu/lisuhp.html>.

Through its Advisory Committee on Performance Indicators (ACPI), SCONUL has sought to develop the collection and use of statistics into the production of useful performance indicators that are recognized nationally beyond the contributing libraries, revealing trends across time and comparing descriptive and evaluative data between libraries. There was initial expectation and enthusiasm that we could rapidly agree on a small set of indicators that would support and fine-tune subjective judgements about the quality of libraries. By the early 1990s, after several years’ efforts, the Advisory Committee faced the common truth that the exercise would be more technically complex and politically difficult than expected.

But persistence has finally brought partial success with the imminent publication of a small set of U.K. Higher Education Library Management Statistics, 1997/98. This publication brings together SCONUL data, parallel data collected for higher education college libraries, and university-level data—University income, enrollment, etc.—drawn from official Government statistics about universities. The data are presented as six “management statistics” along with further background data about each library and institution, chosen to characterize the individuality of institutions and cast light on the variations in the management statistics. The management statistics are:

- total library expenditure per FTE user (i.e. full-time equivalent target user group of students and academic staff);
- expenditure on information provision per FTE user;
- expenditure on staffing per FTE user;
- seat hours available per week per FTE user;
- loans per year per FTE user; and
- interlibrary loans as a percentage of all loans.
The publication identifies for future inclusion three areas where data are not currently collected or are not yet sufficiently robust: stock on loan, electronic services, and user education. We also acknowledge the need to address a few gaps where institutions provide incomplete data and we expect that the increasingly official nature of this usage will encourage nearer to 100% compliance. The Advisory Committee had hoped to have the statistics published as a supplement to the Higher Education Statistics Agency’s official volume of comparative university statistics, but HESA was unwilling to publish data it had not itself collected. Instead, the library management statistics will be published by SCONUL in a format as close as possible to that of HESA’s official statistics publication.

This modest outcome has taken six years of studies and negotiations. In 1993, the report of a national committee of enquiry, the Follett Report, first advocated that “a coherent and generic set of performance indicators for libraries should be developed as soon as possible.” The developmental stages have included:

- an initial working party report;
- a national consultation on the working party’s recommendations;
- a data-cleansing project to identify and correct errors and gaps in historical data;
- a one-year funded research project to explore in detail the validity and usefulness of fifty potential performance indicators;
- a second national consultation on revised recommendations; and
- detailed review and approval by a group set up by the heads of Universities—the Higher Education Management Statistics group.

All this work, of course, sits beside the continuing process of collecting the basic data from university libraries.

Why has this process proved so difficult? First, there is less underlying commonality of view than expected about what makes a good library, leading to emotional debate about which indicators to use. Second, there are some aspects of library performance for which indicators are less easily defined—areas like user education, reference services, overall performance, and effectiveness in terms of economy or efficiency. Third, different stakeholders—librarians, institutions, users, library staff—have different priorities and needs. Fourth, the task of making definitions watertight and effectively understood by data providers has proved as taxing as expressing the definitions to users of the resulting statistics and indicators. However, it might be argued that the process of collectively defining the issues has itself been progress, and a learning exercise that probably could not have been avoided. Let’s hope the outcomes produce some additional useful benefits!

The SCONUL Advisory Committee on Performance Indicators is pursuing other approaches to this issue. The Committee has sponsored a national benchmarking exercise involving small groups of volunteer libraries in jointly producing and testing benchmark processes for particular aspects of library activity, for example reference desk service. SCONUL will publish the outcomes of this project as a book later in 1999. A second working group is producing a national user-satisfaction questionnaire. We are monitoring work elsewhere to develop management statistics covering electronic services: there is no point in replicating funded research.

The Advisory Committee has also established cross-representational links with the Statistics Working Group of the organization that represents U.K. University IT Services—the Universities and Colleges Information Systems Association (UCISA). UCISA has recently begun to collect statistics about IT activity (see <http://www.ucisa.ac.uk/docs/statsur/stats98.htm>). The aims of this collaboration are: to share knowledge and save effort; to use compatible definitions where
appropriate; to deal with the shifting boundaries brought about by growing use of electronic
technology; and to ease the situation of the growing number of “converged” Information Services
units in U.K. higher education. More than half of U.K. universities have brought their libraries
together organizationally with all or some of their IT services. Some of the resulting units are
highly converged and thus have difficulty separating out their resources and activities into
traditional “library” and “IT” pockets in order to contribute data separately to both SCONUL and
UCISA.

We in SCONUL have looked with admiration at the web-accessible presentation of ARL statistical
data, and hope to do something similar. But we have taken on board ARL’s advice that such
exercises are not simple and need specialist skills.

Another SCONUL working party, known for brevity as the SCONUL Quality Group, has been
approaching library performance measurement from a different viewpoint. In the U.K. there has
been strong Government pressure on the higher education funding agencies and on universities
to demonstrate the existence of effective quality measures for teaching, learning, and the student
experience, and to publish the results of these measures. The significant influence of this concern
reflects the dominance of national Government funding of teaching activity in U.K. higher
education and a cross-party political determination in a “customer is king” society to ensure good
value for money. As a result, there has evolved what might be described as a national
accreditation agency for universities—the Quality Assurance Agency (QAA) (see
<http://www.qaa.ac.uk/>). Jointly owned and financed by the funding agencies and the
educational institutions, the QAA regularly inspects institutions and particular subject program
areas and issues public reports grading and commenting on its findings. When this process was
first initiated, coverage of learning resources management and provision was sketchy and
inconsistent. The SCONUL Quality Group was set up as a joint project between SCONUL,
HCLRG and UCISA, and representatives of the predecessors of the QAA, in order to develop an
appropriate weighting and methodology for review of the quality of learning resources. The
outcome has been that “learning resources” (which covers departmental teaching facilities as well
as central services) is one of six aspects of provision that are evaluated in each subject report in
each institution, using a standard set of question guidelines evolved with input from the
SCONUL Quality Group. We have consequently achieved a good standard of consistent
reporting and a source of detailed data—beyond statistical measures!—about the effectiveness of
university libraries in support of teaching. Furthermore, explicit inclusion in the QAA visit
checklist has had very positive effects in encouraging good communication between subject
departments and university library services and the development of joint approaches.

SCONUL would be happy to provide more information about any of the above activities, and to
hear of comparative U.S. developments. The author can be contacted by email at
ian.winkworth@unn.ac.uk. The SCONUL Secretariat can be contacted at
sconul@mailbox.ulcc.ac.uk or via its website <http://www.sconul.ac.uk/>.

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1 Standing Conference of National and University Libraries, SCONUL Annual Library Statistics,
1997/98 (London: SCONUL, 1999). (Volumes for previous years also available.)
SCONUL, 1999).
3 Joint Funding Councils’ Libraries Review Group, Report (Bristol, Higher Education Funding
As the ALA representative to the Statistics Section, I attended the Section's Standing Committee meetings, browsing session, and program as well as the meeting of the Contributing Board for the division to which the Statistics Section reports (Division 6, Management and Technology). For the past year I have served as acting chair and information coordinator of the section. At the Bangkok conference, I was elected chair of the Statistics Section and chair of CB 6. My representation is sponsored by the ALCTS Library Materials Price Index Committee and LAMA Statistics Section.

STATISTICS SECTION MEETINGS

As section chair, I presided over the August 21st and 27th Standing Committee meetings. Elections for the 1999-2001 term were held; I was elected chair and Marie-Dominique Heusse (France) was elected secretary for a second term. Committee members reported on Section business and projects.

Current Projects

1. **Performance Measures Manual.** Secretary/Treasurer Marie-Dominique Heusse (Bibliothèque de l'Université de Toulouse) reported that the French translation of the manual prepared by the IFLA University Libraries Section (Measuring Quality: International Guidelines for Performance Measures in Academic Libraries, IFLA Publication 76: K.G. Saur, 1996) is not yet finished. The Statistics Section has taken responsibility for this translation with funding from the University and Research Libraries Section.

2. **Statistics Section brochure.** Marie-Dominique Heusse distributed copies of the English and French versions of the new brochures. Copies were available at the IFLA booth during the conference; additional copies will be sent to IFLA HQ. Ludmilla Kozlova has completed a Russian translation of the brochure; Marie-Dominique will have it printed this fall. Francisco Javier Alvarez Garcia will arrange for translation into Spanish.

3. **Revision of the Medium Term Plan.** The Section made the following revisions to the Action Plan for 1999-2001. Action 2.2, DELETE Establish an e-mail discussion group for LIS statistical experts. Rather than establishing its own discussion list, the Statistics Section will piggy-back on the CAMILE discussion list run by Manchester Metropolitan University in the U.K. To subscribe to the CAMILE list, e-mail the following message: subscribe camile to the following address: majordomo@mmu.ac.uk Add as Action 2.2. Liaise with ISO over ISO 11620.

* Explore possibilities for closer cooperation between IFLA groups and others involved in the study of performance measures (1999-2000).
New projects

The Section discussed conducting a survey on the teaching of statistics in schools of library and information science. Since the Section on Management and Marketing also intended to conduct a survey on the teaching of marketing, the two sections will work together to produce a survey. Patricia Ward (member of Management and Marketing) will manage the survey for the sections. Results will be featured at a pre-Boston IFLA satellite meeting in Montreal or Quebec.

Plans for future conferences. 2000 IFLA. This year's Program Session (see below) drew over 80 attendants. The program evaluations expressed the desire for practical programs, more diversity in speakers, and inclusion of speakers from developing countries.

A tentative topic for the Jerusalem program is Statistics for the Twenty-first Century. Tentative structure for the two and one-half hour program includes presentations of 15-20 minutes each by three speakers and a question-answer period. Speakers should be encouraged to use good, clear visual aids. Possible speakers include an Israeli speaker (to be identified by IFLA 2000 Program Committee member Prof. Bluma C. Peritz, Hebrew University, School of Library, Archive & Information Studies), a speaker from a library consortium on the use of library statistics by consortium (possibly a report on the ICOLC Guidelines), Yvgenie Kuzmin (Ministry of Culture, the Russian Federation) on the gathering of library statistics in the Russian Federation, and a report on the revision of ISO 2789:1991.

Dean Jue and Christine Koontz of the Section of Management and Marketing would like Statistics to sponsor a three-hour workshop on Using Statistics for Improving the Marketing Your Library.

Plans for IFLA 2001 in Boston include a program and workshop on statistics for digital libraries. Tentative plans for the program include a progress report on the Association of Research Libraries (ARL) attempt to establish measurements for digital collections, the French attempts to establish guidelines for library statistics to be furnished by automated systems, and possibly a vendor (on the role of vendors or bibliographic utilities in supplying library statistics). The Boston workshop would concentrate on practical aspects of gathering statistics from automated systems, from database vendors, etc.

IFLA 2002. The Section would like to hold a pre-conference satellite meeting at the LISU at the University of Loughborough. The meeting would include an overview of LISU’s services (especially the provision of "tailor-made" statistics).

MEMBER ACTIVITIES

Melita Ambrozic (National and University Library, Slovenia) reported that the ISO Standard for Performance Measures is being translated into Slovenian. They have tested a few of the performance measure indicators. Melita has finished her dissertation on library statistics and performance measures in academic libraries. She has introduced a continuing
education seminar on Statistics in Public Libraries and next year will introduce a course in Statistics for School Libraries. Slovenia is using LIBECON standards for collecting national library statistics.

Aline Girard-Billon (Bureau des Bibliothèques, City of Paris) reported that an association of users of automated library systems had been formed. The association will create a working group to compare information and to establish a list of data that should be provided by library systems. They will use the statistical document published by the French Ministry of Culture and Ministry of Education. They hope that this will improve the quality of information supplied to libraries by vendors.

Liz Chapman reported a change in public perception of academic libraries in the U.K. Until recently, university education had been free. Now that students have to pay, there is more interest in comparing universities. Even popular universities are beginning to publish ranked tables on universities, library collection size and spending. SCONUL has taken this opportunity to press for change in the kind of statistics collected in university libraries.

Ludmilla Kozlova reported that there are two working groups working on the revision of the gathering of statistics on the national level. Book production statistics are gathered by the Book Chamber.

Jacob Harnesk reported that work on the Swedish national statistics is progressing. Measuring school libraries is a problem. The subcommittee working on the revision of ISO 2789: 1991 (the standard for library and publishing statistics) has produced a working draft that will be sent out for comments soon.

Wanda Dole reported that in the U.S. the Association of Research Libraries continues to study the problem of measuring electronic resources.

Bjorg Glesne reported that Statistics Norway has shortened the period from collecting to production of the report. They hope that this will improve the utility of the statistics. They are trying to improve the collection of data from automated library systems.

Francisco Javier Alvarez Garcia reported that public libraries in Spain have several problems accepting the ISO standard for library statistics. They have just finished translating ISO 11620. There are problems with data collection. The general organization for data collection in Spain is new and is having difficulty obligating various communities to report statistics.

BROWSING SESSION, AUGUST 22

The Section held its fifth Browsing Session on August 22. Like the previous four, this year's session was a small exhibition of published national statistics from different countries. The 1999 session concentrated on public library statistics. The sessions satisfy the delegates need for a hands-on session with time for questions and discussion.
The session, entitled "Statistics: A Practical Tool for Library Management", drew an audience of approximately 80 people. Gary E. Gorman (School of Communications and Information Management, Victoria University of Wellington, NZ) discussed some of the pitfalls of data collection and encouraged librarians to develop means of controlling data so that statistics may be used more effectively. Alvin Schrader (School of Library and Information Science, University of Alberta, Canada) described Canada's National Core Library Statistics Program. This program is designed to capture several key indicators of the broad impact on Canadian society of library services provided by the public, academic, and special library sectors. It is a joint effort of the National Library of Canada and an advisory committee comprised of representatives of various library associations and agencies. The first year of operation was 1995-96, during which 1994 statistics were collected. In 1997-98, 1995 statistics were similarly processed, and in 1998-99 the third year of the Program was completed covering 1996 statistics. Plans are underway to continue the program for 1997. Jakob Harnesk (Sweden) reported on the work of the international group of experts charged with surveying the current implementation of ISO 2789: 1991 (the standard for library and publishing statistics), preparing recommendations for additions covering electronic resources, and revising the standard reported on recent meetings. Progress reports are posted at the Web site (http://www.kb.se/bibsam/sc8/standards.html). David Fuegi (LIBECON 2000, Colchester, UK) gave a progress report on LIBECON 2000, a project funded by DG13 of the European Commission within the Telematics Application Program. LIBECON 2000 will run for 3 years (until early 2001). The project collects and library statistics of 29 European countries on its Web site (http://www.libec2000.org). The Web site also contains a bibliography of relevant data sources for countries and individual library sectors, key statistics contained in the sources referenced, and persons/organizations to The full texts of the presentations, except for Harnesk's, are available at the IFLA Web site (http://www.ifla.org).

Evaluation of the program. For the first time, the Section handed out evaluation forms at the open program. Fifty-one of the ca. 80 delegates attending the program completed evaluation forms. Evaluations were generally positive. Suggested topics for future programs included Web-based data collection, software for library statistics, performance measures/indicators, interpretation of statistics, and practical applications of library statistics.