A Methodology for Implementing the Standardized Statistical Measures and Metrics for Public Services in Archival Repositories and Special Collections Libraries

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Cover Page Footnote

A Methodology for Implementing the *Standardized Statistical Measures and Metrics for Public Services in Archival Repositories and Special Collections Libraries*

In 2018, the Rare Books and Manuscripts Section (RBMS) of the Association of College and Research Libraries (ACRL) and the Society for American Archivists (SAA) published a joint standard, *Standardized Statistical Measures and Metrics for Public Services in Archival Repositories and Special Collections Libraries*[1] (hereafter the standard). The standard provides a shared vocabulary and set of statistical measures that help archival and special collections repositories articulate their value as they share concrete evidence demonstrating the impact of their services. The standard is specifically designed to be system agnostic so that all repositories can use it. Many of the standard's recommended measures, particularly those related to users and circulation, however, are challenging to implement without the use of a reading room management software system. To date, most of the conference presentations and literature on adopting the standard focus on doing so within the context of an institution that uses proprietary reading room management software.

This case study explores the adaptation of an existing quantitative assessment program to incorporate the measures and metrics suggested by the new RBMS/SAA standard at the University of Arkansas Special Collections Division (hereafter UA Special Collections) without the use of specialized reading room management software. Like many special collections and archival repositories, UA Special Collections historically has gathered a wide range of statistics about the use of the repository, but data capture, definitions, and reporting practices have varied significantly as responsibility for this work shifted from person to person. The introduction of the new standard offered Special Collections the opportunity to revisit the data points that we collect, discuss the purpose behind our data collection activities, and bring our practices into alignment both with our own institutional methods and with national trends, without investing in a new software solution. After establishing policies, procedures, and practices for capturing standardized data, we could then turn to using those metrics to craft narratives about the impact of our work.

Literature Review

In 1965, long before the RBMS/SAA joint task force began work on drafting the standard, H. G. Jones noted that "the major obstacle to improved administration of records, whether public or private, is the absence of a systematized, standardized set of archival definitions, principles, and techniques."[2] Schellenberg's observation remained accurate for decades, with Grimard noting in

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[1] Association of College and Research Libraries Rare Books and Manuscripts Section/Society of American Archivists, *Standardized Statistical Measures and Metrics for Public Services in Archival Repositories and Special Collections Libraries* (Association of College and Research Libraries, 2018), http://www.ala.org/acrl/sites/ala.org.acrl/files/content/standards/statmeasures2018.pdf.

[2] H. G. Jones, review of *The Management of Archives*, by T. R. Schellenberg, *American Archivist* 28, no. 4 (1965): 566.

2004 that "archivists have not significantly addressed evaluation of their programs, either from a theoretical or a methodological perspective,"[3] despite continued attention to the question.

In 2010, two projects signaled a shift from discussing a lack of methods to an emphasis on practical solutions for both assessment in general and interoperable metrics more specifically in the management of special collections and archives. First, the Archival Metrics project developed a set of tool kits to help archivists conduct user-based evaluations in a college or university setting using standardized, validated instruments.[4] Second, OCLC Research published the results of a survey of special collections and archival repositories. This report noted that the "lack of established metrics limits collecting, analyzing, and comparing statistics across the special collections community."[5] One of the key action items from the report was a call to "develop and promulgate **metrics** [emphasis in original] that enable standardized measurement of key aspects of special collections use and management."[6]

In the wake of these efforts, the special collections and archival literature witnessed a renewed interest in assessment and interoperable metrics. Chapman and Yakel reiterated the OCLC report's call for interoperable data sets with their own analysis of assessment efforts in special collections and archival repositories, noting "the need for the profession to achieve consensus on definitions for quantitative metrics to facilitate comparisons between institutions."[7] Similarly, in her analysis of the value proposition assigned to distinctive collections, Carter notes that "assessment activities need to be not only grounded in shared best practices and tools to provide a basis for external benchmarking but also tailored to address local questions and concerns . . . we need to gather data that help us strengthen our collections, workflows, services, and their impact."[8] In their 2013 analysis of previous attempts to create standardized statistical measures for archival and special collections repositories, Dupont and Yakel conclude that a "pressing need for special collections and archival metrics . . . remains."[9]

Following this renewed interest in interoperable metrics, a few publications considered local implementations of the Archival Metrics tool kit and responded to the OCLC Research Report.[10]

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[3] Jacques Grimard, "Program Evaluation and Archives: 'Appraising' Archival Work and Achievements," *Archivaria* 57 (2004): 69–70.

[4] Wendy Duff et al., "The Development, Testing, and Evaluation of the Archival Metrics Toolkits," *American Archivist* 73, no. 2 (2010): 569–99.

[5] Jackie M. Dooley and Katherine Luce, "Taking Our Pulse: The OCLC Research Survey of Special Collections and Archives," OCLC Research (2010), 10, https://www.oclc.org/content/dam/research/publications/library/2010/2010-11.pdf.

[6] Dooley and Luce, "Taking Our Pulse," 110.

[7] Joyce Chapman and Elizabeth Yakel, "Data-Driven Management and Interoperable Metrics for Special Collections and Archives User Services," *RBM: A Journal of Rare Books, Manuscripts, and Cultural Heritage* 13, no. 2 (2012): 129.

[8] Lisa R. Carter, "Articulating Value: Building a Culture of Assessment in Special Collections," *RBM: A Journal of Rare Books, Manuscripts, and Cultural Heritage* 13, no. 2 (2012): 94.

[9] Christian Dupont and Elizabeth Yakel, "'What's So Special about Special Collections?' Or, Assessing the Value Special Collections Bring to Academic Libraries," *Evidence Based Library and Information Practice* 8, no. 2 (2013): 12.

[10] Hayrunnisa H. Bakkalbasi and Jocelyn K. Wilk, "Getting to Know You (and Me!): Assessment and the Archival Metrics Toolkit at Columbia University Rare Books and Manuscript Library." In *Proceedings of the 2014 Library*

Most research and publications that focus on demonstrating the impact of repositories' work, however, have concentrated on local practice or one targeted programmatic area. Programmatic approaches to assessment in one area have considered, for example, instruction, web analytics and finding aids, archival collections assessment, and exhibitions programs.[11] Individual case studies also feature more holistic approaches to assessment, but they do not necessarily provide a framework for interoperability with other repositories.[12]

It was within this context of long-documented need that the new standard was published. The RBMS/SAA standard was designed to "provide archivists and special collections librarians with a set of precisely defined, practical measures based upon commonly accepted professional practices . . . to support the assessment of public services and their operational impacts."[13] Importantly, the standard was also designed to facilitate comparisons between repositories, regardless of size, collecting scope, and parent organization, ensuring that two hundred registered users in fiscal year 2018, for example, means the same thing at a historical society as it does as a government archive.

The standard covers eight domains associated with public services work in archives and special collections: user demographics, reference transactions, reading room visits, collection use, events, instruction, exhibitions, and online interactions. Each domain consists of a basic measure, considered the baseline measure for collecting data in the domain, followed by advanced measures, which repositories are encouraged to collect as necessitated by institutional needs and resources. Finally, each domain suggests recommended metrics, or the ratios between two measures or between a measure and an independent variable (e.g., time), for a repository to consider calculating.

Following its publication in 2018, there have been two contributions of note to the professional literature on adopting and implementing the standard. First, a seminar at the 2019 RBMS Annual Conference explored how early adopters at the University of California, Riverside; Yale

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Assessment Conference: Building Effective, Sustainable, Practical Assessment, Seattle, WA, August 4–6, 2014, 194–203, http://libraryassessment.org/bm~doc/proceedings-lac-2014.pdf; Melanie Griffin, Barbara Lewis, and Mark I. Greenberg, "Data-Driven Decision Making: An Holistic Approach to Assessment in Special Collections Repositories," *Evidence Based Library and Information Practice* 8, no. 2 (2013): 225–38; Martha O'Hara Conway and Merrilee Proffitt, "The Practice, Power, and Promise of Archival Collections Assessment," *RBM: A Journal of Rare Books, Manuscripts and Cultural Heritage* 13, no. 2 (2012): 100–112.

[11] Anne Bahde and Heather Smedberg, "Measuring the Magic: Assessment in the Special Collections and Archives Classroom," *RBM: A Journal of Rare Books, Manuscripts and Cultural Heritage* 13, no. 2 (2012): 152–74; Rachael Hu, "Methods to Tame the Madness: A Practitioner's Guide to User Assessment Techniques for Online Finding Aid and Website Design," *RBM: A Journal of Rare Books, Manuscripts, and Cultural Heritage* 13, no. 2 (2012): 175–90; Conway and Proffitt, "The Practice, Power, and Promise," 100–112. For a consideration of calculating benefits to a repository's operations through exhibitions work, see Michael L. Taylor, "Special Collections Exhibitions: How They Pay Dividends for Your Library," *RBM: A Journal of Rare Books, Manuscripts, and Cultural Heritage* 19, no. 2 (2018): 121–32. For an approach to user assessment of affective responses to an exhibition, see Meg Frost, Caitlyn Towne-Anderson, and Kendal Ferguson, "The Positive Side of Eliciting Negative Emotions: Survey Results of Visitor Responses to a Library Exhibit," *RBM: A Journal of Rare Books, Manuscripts, and Cultural Heritage* 20, no. 2 (2019): 84–94.

[12] Griffin, Lewis, and Greenberg, "Data-Driven Decision Making."

[13] RBMS/SAA, *Standardized Statistical Measures*, 5.

University; the University of Kentucky; the University of Michigan; Louisiana State University; and the University of Rochester implemented the standard in their own institutional contexts.[14] Notably, of these institutions, only the University of Rochester implemented it without having an automated reading room management system in place; all other implementations relied on specialized software to capture basic and advanced measures. At this presentation, the representative from Rochester focused on methods for implementing measures related to reference transactions, not the complete standard. Second, a recent case study from the L. Tom Perry Special Collections at Brigham Young University provided an analysis of creating an assessment program in light of the publication of the new RBMS/SAA standard.[15] Importantly for this case study, it also occurs at an institution that does not use an automated reading room management system and, at the time of writing, represents the only other published case study documenting ideas for how to implement the standard independent of specialized software. The present case study builds on the study at the L. Tom Perry Special Collections and offers the perspective of changing existing workflows and practices from an established assessment program in the wake of the new standard, whereas the L. Tom Perry case study focuses on designing a new assessment program in response to the standard's creation.

Making the Case for Adopting the Standard

UA Special Collections is located within the main library on the University of Arkansas campus in Fayetteville. The University of Arkansas is a research intensive, public, land grant university with an FTE enrollment of 27,000. The University of Arkansas Libraries, consisting of the main library and three branch libraries, hold just over 2.5 million volumes and employ 160 FTE staff members. UA Special Collections includes manuscript collections, rare books, and university archives in one repository. We have approximately fourteen FTE staff members, and we help around 2500 researchers each year in person and over email and phone. A little over half of our users are UA affiliates, with the other half spread fairly evenly between community members and visiting researchers affiliated with other institutions at the undergraduate, graduate, or faculty levels.

As Chapman and Yakel noted in 2012, "collecting administrative data solely for the sake of collecting data—without a clear sense of what questions the data will be used to answer—is not an uncommon practice in special collections."[16] Prior to adopting the RBMS/SAA standard, UA Special Collections data collection practices largely supported Chapman and Yakel's observation. The division collected numerous statistics that would be reported to the libraries' administration for university-wide and national reporting purposes, such as the number of instruction sessions held and the count of items in our collections. We also collected a wide range of data because those data points had been useful at one time, although we could not clearly articulate the current utility of the data. We reported data about collections processing information based on where collections were physically housed, despite the introduction of an

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[14] Robin Katz et al., "Do Your Metrics Measure Up? Assessment and Implementing the New Standards for Public Service Statistics," Presentation, RBMS Annual Conference, Baltimore, MD, June 18–21 2019.

[15] J. Gordon Daines III and Cindy R. Brightenburg, "Jumping In: Creating an Assessment Program for the L. Tom Perry Special Collections Reading Room," *Journal of Western Archives* 10, no. 2 (2019): 1–21.

[16] Chapman and Yakel, "Data-Driven Management," 131.

off-site storage facility that radically changed the types of collection management decisions that the data point was originally designed to help solve. We reported researcher use of photographs separately from manuscript collections on some reports but not all, even when photographs were housed and described in a larger manuscript collection. We kept meticulous records regarding our visiting researchers' home city but did not routinely track what time of day patrons typically visited the reading room.

Further, we lacked a shared understanding of what each data point we captured actually represented. Due to our public service model, which includes two full-time staff members in Research Services as well as regular desk shifts by all permanent staff in the division and between three and five student assistants, we had as many as eighteen staff members recording public services data on paper-based tracking forms at any given time. In addition, depending on which staff member transferred data from the paper forms into an Excel spreadsheet, the count of researchers working in the reading room for a month might include or exclude staff members, might count each time an individual researcher checked in each day, or might instead count each individual researcher only once per day. We recorded researcher interactions for each year in the composite, so we are unable to quickly look back to previous years and know how many of the 2500 researchers we helped were registered users working in the reading room versus an email patron contacting us to find out if we held a collection containing a certain type of material. Most of UA Special Collections' public services data stems from paper-based registration forms and call slips, and the electronic summaries of these forms were housed on different staff members' computers and in different formats, including Excel sheets, Word documents, and Access databases. Special Collections data points for libraries-wide statistics were occasionally but not always reported using shared, libraries-wide LibInsight forms. In short, although each data point was originally collected for a defined purpose with a use case in mind, data collection had become a rote habit, and it was time to engage in conversations around both *why* we collect data and *how* to collect data consistently and uniformly.

The publication of the ACRL-SAA standard in 2018 provided us with the impetus and a framework for conversations that took place over the course of 2019 about both how and why we collect public services data at UA Special Collections. By framing conversations around the standard, we were able to focus on product and process without becoming too bogged down in perceived value judgments about previous practice. This was particularly important in our institutional context as our implementation was conceived of and led by two relative newcomers to the division: the head of Special Collections, who began work in July 2017, and myself, the assistant head of Special Collections, who joined the division in October 2018. Following the publication of the standard, our head charged me with evaluating and comparing current practice at UA Special Collections to the standard and devising a work plan to implement the standard. A complicating factor was that our implementation needed to be budget neutral; we could order standard office supplies, such as a ream of multicolored office paper, but software subscriptions, hardware, and furniture were outside the budget scope for the project.

The initial review of the standard and current practices resulted in the creation of two local working documents. The first document provided an executive summary of the standard, with

mappings either to current local practice or gaps in local practice for each of the basic and advanced measures across the standard's eight domains. The second document took the form of a scope of work, which recommended a series of actions for implementing the standard within the local context of UA Special Collections. Both documents provided the basis for broader conversations within the division about the standard and past practices. As a newcomer who had not yet seen a full year of data capture and reporting, it was important for me to have conversations with those who were previously responsible for this work. These conversations served two purposes. First, they provided background information to public services staff, many of whom were not familiar with the standard. Second, they provided me with important information checks where my read of local practices was off or missing nuance. The scope of work document in particular provided a roadmap for implementing the standard and guided the process.

Implementing the Standard

In this case study, I consider each of the eight domains and discuss how UA Special Collections implemented data collection practices for the basic measures and determined which advanced measures and recommended metrics to capture given the realities of working in an environment without an automated reading room management system.

Domain 1: User Demographics

The basic measure for the user demographics domain is user association, or the relationship between a user and the repository and/or the repository's parent organization. The goal of this measure is to capture a discrete number of users alongside the users' relationship to the parent organization during a defined period of time. Prior to implementing the standard, UA Special Collections did not consistently maintain an accurate count of discrete users during a specified time period, and records were spotty regarding user affiliation with the university. Instead, we counted "researchers" by interaction—a patron emailing with a reference question, for example, was included in the count of "researchers," as were staff members working in the reading room preparing for an instruction session. Further, our procedures around registration made it difficult to count discrete users as we required registration only of patrons requesting use of manuscript collections. Researchers using only published materials were not required to register.

Adapting our registration policies and procedures along with making a few simple changes to our registration form enabled us to capture with relative ease the number of users visiting our repository each year along with each user's association. We began asking all researchers, regardless of the type of material they were using, to fill out a registration form, and we now ask all researchers to update their registration with us once per year. We also modified our registration form to provide more granular status options, differentiating between UA faculty, for example, and faculty members visiting from other institutions. While we have always asked researchers to provide an institutional affiliation, patron-provided data in this field has been patchy at best. Adding a status for each type of UA-affiliate has eliminated that data variation.

We also added a few fields to our registration form to enable capture of select advanced measures and recommended metrics related to demographics. An important advanced measure

for our institution is user affiliation, defined locally to include institutional affiliation and rank at institution, such as "graduate student" or "alumnus/a." Including this measure in our reporting enables us to describe the range of patrons served and demonstrate impact beyond our local campus, which is a crucial element for a land grant institution. We track newly registered users each month to help gauge seasonal fluctuations in the types of support required for staffing the reading room.

Domain 2: Reference Transactions

Prior to adopting the standard, UA Special Collections captured in-person reference transactions using a libraries-wide LibInsight form. Email reference, however, was inconsistently reported across the division with wide variance between staff members and was not always counted in the libraries-wide reporting. In order to capture the basic measure in the domain "reference transactions," which is the number of unique reference questions received, regardless of method, we took steps to standardize our capture of reference activities. We implemented staff training to ensure that all staff captured reference transactions, regardless of where they occurred or the method by which they were received, using the existing LibInsight form. We also created an internal work form (see appendix A) to help track longer, more complex reference transactions that multiple staff members contributed to answering. While this work form created an additional manual data point to record, it also ensured that each question was counted only once rather than being counted by each staff member who worked on it.

After consulting with librarians in other units who use the shared reference transaction form, we added an optional data point to the existing LibInsight form for one advanced measure: time spent responding to a question. The method by which the question was received was already on the form; ensuring the form was consistently filled out ensured that we captured this advanced measure. As we are currently using a libraries-wide LibInsight form to capture reference transactions, we elected not to add additional advanced measures from the standard.

Domain 3: Reading Room Visits

The basic measure for reading room visits, a count of the number of registered users per day, with each user counted once regardless of the number of times they enter or leave the room, proved one of the more challenging measures for us to collect in terms of labor required of staff and researchers. Prior to implementing the standard, we allowed researchers to reuse call slips from previous visits. In order to capture an accurate number of visitors to the reading room without adding an additional form to fill out, such as a guest book, we implemented a policy where researchers fill out a new call slip each day. While we worried about researcher reactions, particularly from frequent visitors, the change in policy resulted in very few reactions, negative or otherwise. The handful of times a researcher has complained, a staff member has assisted with data entry on the call slip.

On our call slip, we also added a field for arrival and departure times, enabling us to capture the advanced measure of user hours, which the standard defines as the cumulative amount of time a user spends in the reading room per day, as well as a number of recommended metrics, including the total number of reading room visits per day and the average number of reading room visits

per day. These metrics proved very helpful as we reviewed our staffing levels and hours of operation.

Domain 4: Collection Use

Prior to implementing the standard, we kept meticulous records of collection usage, but these records existed solely on paper call slips filed by date, and we did not differentiate between researcher use and staff use for reporting purposes. We invested time in cross-referencing material types, such as "manuscript collection" or "rare book collection," with user status, but annual reporting was aggregated at the collection level, making it difficult to track usage at the container level across patrons. To capture the basic measure related to collection use, which is defined as the number of collection unit checkouts for any use by staff and researchers, we implemented changes to our call slip (see appendix B) to make it easier to track collection usage at the container level. At the same time, we introduced changes that enabled us to track select advanced measures, including reading room use and staff use. We kept existing check boxes for patrons to indicate their research purpose from our old call slip and added a number of additional checkboxes that map to advanced measures for staff use, including exhibition use, instructional use, reference use, and operational use, which we call "other" on our call slip to eliminate confusion regarding the definition of "operational." We also began consistent use of call slips for operational use outside of Special Collections, including digitization requests and interlibrary loan requests.

In addition to revising the call slip, we also revised our workflows for transferring call slip information into an online database. This step is enormously time consuming, but it provides crucially needed operational data to help inform collection management decisions, particularly as we opened a new offsite storage facility in late summer 2018 and now rely, in part, on circulation data to decide which collections are too heavily used to be stored offsite. A staff member enters all data from call slips into a LibInsight form (see appendix C), with one form filled out for every container that circulates. The resulting report from LibInsight provides us with the basic measure for collection usage, and it also allows for simple manipulation via spreadsheet export from LibInsight to determine staff versus researcher use as well as usage purpose.

We rely on permission to publish forms, revised in spring 2020 to be called notification of intent to publish forms, to capture the advanced measure publication use. Similarly, we use work forms generated by ILLiad software and sent to Special Collections staff via email to track interlibrary loan requests received and interlibrary loan requests filled. Patron requests for reproductions also generate a work form sent to Special Collections staff via email, and this form provides the basis for the advanced measures reproduction requests and reproduction requests made. A staff member transfers all of these measures from paper or email forms into a database using LibInsight forms for data entry.

Domain 5: Events

While some domains, such as collections use, were challenging to implement because of the amount of manual data entry required, others, such as events, required creative solutions as our implementation occurred within the larger context of an academic library and existing reporting

structures. The basic measure for the events domain is the number of events, or a simple count of all events, including but not limited to lectures, presentations, tours, and webcasts. Historically, UA Special Collections has reported our events on a libraries-wide LibInsight outreach form, which does provide the basic measure as well as the advanced measure of event attendees, defined as the number of attendees at a given event. Since the form is shared by a number of units in the libraries, we identified two options. First, we could make a new, Special Collections–only form to capture more of the advanced measures, such as type of event; second, we could continue using the existing form and negotiate for the addition of new fields.

Although having a more customized form was appealing, we ultimately decided to continue using the existing libraries-wide form to help streamline required reporting to ACRL and the Integrated Postsecondary Education Data System (IPEDS). In conversations around the standard, it became clear that having a better understanding of the amount of time required for certain tasks and duty assignments was very important, particularly as our division is fully staffed and taking on new projects will require giving other things up. Therefore, we requested and received permission to add an optional field to the existing form for the advanced measure event preparation time.

Domain 6: Instruction

As with events, for a number of years UA Special Collections has reported instruction sessions via the libraries' centralized LibInsight form, ensuring that our instruction was captured and reported in university and external reporting. As we wanted to continue using this centralized reporting mechanism, we were limited in the number and extent of changes we could make to the form. Fortunately, the existing workflow captured the basic measure for instruction, which is the total number of instruction sessions. It also captured several advanced measures, including number of students, instructional level of students, and instruction session duration. One advanced measure not captured was instruction session preparation time. This measure was important to us to capture in order to better understand the division of labor, so as with the shared events form, we negotiated adding it to the existing shared instruction form.

Domain 7: Exhibitions

Although UA Special Collections has had an active exhibitions program for many years, installing an average of nine to twelve exhibitions per year, prior to implementing the standard we did not formally count or report our work in this area. In order to capture the basic measure— number of both physical and digital exhibitions mounted—we created a simple LibInsight form (see appendix D). In keeping with our practices in other domains, being able to quantify staff effort in the area of exhibits was important to us, so we added fields for a number of advanced metrics, including exhibition preparation time and number and type of exhibition promotions. We also added custom, institution-specific fields for the primary curator and any curatorial assistants so that we could better track division of labor.

Many advanced measures in the exhibitions domain, however, proved impossible for us to implement. Tracking the advanced measure exhibition visitors, for example, requires a repository to count the individuals who visit a physical exhibit. Our exhibit cases are spread over two floors

and all but two lack a direct line of sight from any office or service point in Special Collections. As there is no door or entry point to a gallery, asking visitors to sign in when visiting an exhibition proved logistically impossible. Therefore, we decided not to collect this data point. Similarly, our exhibit program is currently physical only; there is not a digital component. Therefore, instead of collecting the advanced measure of exhibition types, we altered the measure to focus on exhibition location, including an option for pop-up exhibits that take place outside of the main library.

Domain 8: Online Interactions

While some domains were challenging to implement, the final domain, online interactions, proved one of the simplest for us to capture. The basic measure in this domain is page views, including all views from the repository's main website, finding aids, online exhibitions, and digital exhibitions. The standard recommends excluding staff page views if possible. The UA Libraries already used Google Analytics to track website usage, so we confirmed with the web services librarian that our analytics parameters were set to include all of our online content. Unfortunately, due to the way our campus configures its network, it is impossible to exclude staff views from the measure. Google Analytics also tracks a number of the standard's recommended advanced measures, including unique page views, sessions, session duration, and traffic source, and we configured the reports Google Analytics generates each month to include these measures. UA Special Collections contributes content to the library's social media channels, but we do not have our own profiles on any platform, so we decided not to focus on social media reach at this time.

Using the Standard to Tell the Story of Our Work

At the RBMS 2019 session on implementing the standard, all participants, regardless of the technology used at their repository, noted how useful it was to create monthly summary reports for each of the domains in the standard.[17] The need for a centralized, quickly accessible report was immediately apparent in our local context as well. Our data reporting had become more unified as all measures except online interactions were tracked via LibInsight forms, but the reports LibInsights creates require customization and manipulation to provide meaningful data for analysis and sharing. Librarians from Louisiana State University generously shared a model for a monthly report with UA Special Collections, and I adapted it to fit our local implementation.

Each month, a staff member enters information from paper registration forms and call slips into LibInsight forms, creating a searchable database. Individual staff and faculty members in the division are responsible for inputting their own reference transactions, exhibition records, instruction sessions, and outreach events into the appropriate LibInsight form within five working days of the end of each month. After all the data has been entered into the system, I download reports, aggregate numbers where needed, and create a monthly report for each of the eight domains. It is important to reiterate that this report is not automatic or created with the push of a single button. This would be true, regardless of the software used to track public service

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[17] Katz et al., "Do Your Metrics Measure Up?"

metrics, but it is especially important in an environment without reading room management software that relies more heavily upon staff labor to generate statistics. What the standard and our centralized reporting structure enabled was not automatic report creation but a knowledge of what data points we are collecting, what those data points mean, and where to find a complete data set.

It is also crucial to highlight the fact that the data we have collected after adopting the standard is not the end point of our assessment efforts. Rather, it is a crucial first step. In our institutional context, telling stories about operational impact that are supported by data is central to advocating for support. To support our ability to tell stories grounded in standards-compliant data, we tasked our functional teams that oversee different areas related to the standard (such as instruction, exhibitions, and reference) with implementing regular reviews and analysis of the data set rather than trying to write narratives at the end of our fiscal year, as we had previously. This approach yielded benefits in two areas. First, it requires that we analyze data routinely. During our implementation year, this helped us identify gaps and inconsistencies in our methods and allowed us to make incremental adjustments rather than having an entire year of data that was missing certain elements.

A second benefit to regular analysis of data hinges on the entirely quantitative nature of the standard. It does not provide a framework for collecting the qualitative aspects of our work that are beneficial to impact narratives. From our data collection via the standard we know, for example, that in November 2020 UA Special Collections installed two exhibitions and that ten different staff members participated in some aspect of the curatorial process. Comparing these numbers to other months indicates that November is an outlier in a number of ways. We usually do not mount multiple exhibits in one month, and almost three times the normal amount of staff were involved in exhibitions during November as is typical. By analyzing this data in late January rather than waiting until August of 2021, November's experience was fresh in our minds and we could easily pinpoint the reason for this anomaly and explain its significance: one of these exhibitions represented an experiment in a distributed curatorial model. These numbers, therefore, have significance not only for our exhibitions program but for our staffing decisions as well.

This distributed curatorial model represents just one example of how we are using data from the new standard to drive strategic planning and assessment. Other areas that we considered early on include hours of operation for our reading room and collections storage decisions for materials in offsite storage. Moving forward, we expect to use data to help inform our reopening strategy after closures related to COVID-19. Narratives created around last year's data, for example, illustrate the impact of in-person research visits from non-affiliates, including visiting faculty, students, state department officials, and international government representatives studying the history and ongoing impact of international exchanges. Our reopening strategy needs to take these types of researchers into account, either in enabling physical access to the collections, providing robust duplication services, or creating a network of proxy researchers. We also expect to use narratives informed by this data to help us rethink essential services as we plan for instruction, programming, and research visits in a radically altered environment.

While there are numerous benefits to our local implementation of the standard, our ongoing commitment to quantitative and qualitative assessment, enabled by our use of the standard, represents a significant outlay of both patron effort and staff time. Almost all of our patrons have cheerfully assisted us with filling out forms, it is true, but the system is not effort neutral for them. In terms of staff time, one staff member devotes approximately 30 percent of her effort per month to entering statistics into LibInsight, and I spend approximately five hours per month manipulating and analyzing data. After data entry is complete, smaller groups within the division spend about an hour each meeting and discussing quarterly reports. Despite the challenges and labor required, knowing what statistics we collect, why we collect them, and having data sets that are interoperable with other repositories has proved beneficial to our daily operations and strategic planning.

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Appendix A: Work Form to Track Complex Reference Questions

Worksheet for Special Collections Distance Researchers

Request received by: ☐ Mail ☐ Email ☐ Telephone ☐ Fax

Name _____ **Telephone__(   )_____
(Please print)   Last   First

Address _____
                   Street   City   State   Zip code

Email _____   **Date** _____

Request type (check all that apply:

☐ Request duplication services ☐ Reference question ☐ Research consultation

☐ Other _____|

Collections accessed by staff to answer reference question:

Collection Number / Call Number	Title	Series Number, Box Number

Duplication request:

Number of pages reproduced:

Request filled:

Notes:

Appendix B: Revised Call Slip

Arrival:
Departure:

CALL SLIP
Special Collections
University of Arkansas Libraries

Name: _____

Email: _____ **Date**: _____

My research is for:

☐ Publication ☐ Dissertation ☐ Thesis ☐ Coursework ☐ Personal Interest ☐ Commercial Use

☐ Media ☐ Staff: Exhibition ☐ Staff: Instruction ☐ Staff: Reference ☐ Staff: Other

☐ Other _____

Collection Number / Call Number	Title	Series Number, Box Number

Appendix C: Materials Used LibInsight Form

Date of Visit [_____ 📅]

Arrival Time [_____ 🕐]

Departure Time [_____ 🕐]

Name (Last name, First Name) [_____]

Material Requested for:
- ☐ Publication
- ☐ Dissertation
- ☐ Thesis
- ☐ Coursework
- ☐ Personal Interest
- ☐ Commercial Use
- ☐ Media
- ☐ Staff: Exhibition use
- ☐ Staff: Instruction use
- ☐ Staff: Reference use
- ☐ Staff: Other

If other, describe:
[_____]

Type of Material Requested
- ○ Manuscript Collection
- ○ University Archives
- ○ Rare Book Collection
- ○ Arkansas Collection
- ○ Vault
- ○ Map
- ○ Photograph Collection
- ○ Vertical File
- ○ Microfilm

Call number / MC Number [_____]

Author [_____]

Title [_____]

Series Number, Box Number(s) [_____]

❓ [Submit] or [Submit & Clear] ❓

Appendix D: Exhibitions LibInsight Form

Name of Exhibition

Primary Curator

Curatorial Assistants

Location of Exhibit
- ○ Reading Room Wall Cases
- ○ Reading Room Flat Cases
- ○ Hall Cases
- ○ 2nd Floor Vitrine
- ○ 2nd Floor Flat Cases
- ○ Walton Cases
- ○ Pop-up Exhibit
- ○ Other

If other, please describe

Date of Preservation Review ❓

Exhibition Start Date

Exhibition End Date

Exhibition Preparation Time ❓

Exhibition Promotions ❓
- ☐ Newswire
- ☐ Facebook post
- ☐ Tweet
- ☐ Instagram post
- ☐ Blog post
- ☐ News article
- ☐ Broadcast
- ☐ Interview
- ☐ Event