Measurement & Metrics for
U.S. Presidential Libraries & Museums

2016 Library Assessment Conference, Arlington, VA, October 31 - November 2

Wanda V. Dole
Abraham Lincoln Presidential Library

Jack Robertson
Jefferson Library at Monticello
Abstract

• There are measurements & metrics for academic & public libraries.
• Are there measurements & metrics for U.S. presidential libraries?
  • NARA presidential libraries?
  • Pre-NARA presidential libraries?
• What would be appropriate measures?
• This presentation reports a study of
  • characteristics & current practices at NARA & pre-NARA libraries
  • attempts to develop guidelines & metrics for measuring pre-NARAs
Outline

• NARA Presidential Libraries
• Pre-NARA Presidential Libraries
• Jefferson & Lincoln Libraries
• Goal
  • To identify peers
  • To learn what peers measure
• Methodology
  • Qualitative: interviews, calls, visits
  • Quantitative: survey
• Conclusions
Development of Federal Presidential Libraries

- FDR Library, 1939
- Truman Library, 1950
- Presidential Libraries Act, 1955
- Presidential Records Act, 1976
- Presidential Libraries Act, 1986
- NARA sets metrics for NARA Presidential Libraries
NARA Presidential Libraries & Museums: Year of Transfer to Federal Government

- Herbert Hoover, 1964
- Franklin Delano Roosevelt, 1940
- Harry S. Truman, 1957
- Dwight D. Eisenhower, 1964 (library)
- John F. Kennedy, 1979
- Lyndon Baines Johnson, 1984
- Richard Nixon, 2007
- Jimmy Carter, 1986
- Ronald Reagan, 1991
- George Bush, 1997
- William J. Clinton, 2004
- George W. Bush, 2013
Pre-NARA Presidential Libraries & Museums
*R denotes sites with scholarly research libraries

• George Washington *R
• John Adams
• Thomas Jefferson *R
• James Madison *R
• James Monroe *R
• John Quincy Adams
• Andrew Jackson
• Martin Van Buren
• William Henry Harrison
• John Tyler
• James K. Polk
• Zachery Taylor
• Millard Fillmore
• Franklin Pierce
• James Buchanan *R
• Abraham Lincoln *R
• Andrew Johnson
• Ulysses S. Grant *R
• Rutherford B. Hayes *R
• Chester A. Arthur
• James A. Garfield *R
• Grover Cleveland
• Benjamin Harrison
• William McKinley *R
• Theodore Roosevelt *R
• William Howard Taft *R
• Woodrow Wilson *R
• Warren G. Harding *R
• Calvin Coolidge *R
## Two pre-NARA Libraries

<table>
<thead>
<tr>
<th>Thomas Jefferson Foundation, Jefferson Library</th>
<th>Abraham Lincoln Presidential Library and Museum</th>
</tr>
</thead>
<tbody>
<tr>
<td>• 1923 (Foundation), 2002 Library</td>
<td>• 1889 (ISHL), 1998 (ALPL)</td>
</tr>
<tr>
<td>• Foundation/Association</td>
<td>• State Agency</td>
</tr>
<tr>
<td>• 5.5 staff including volunteers</td>
<td>• 25 plus volunteers &amp; interns</td>
</tr>
<tr>
<td>• 30,000 published collection</td>
<td>• 200,000 “published collection”</td>
</tr>
<tr>
<td>• 12,000 unpublished research</td>
<td>• 52,000 Lincoln “items”</td>
</tr>
<tr>
<td>• 100 Mss. Collections</td>
<td>• 6,000 Mss. collections</td>
</tr>
<tr>
<td>• 10,000 visitors per year (Library), 440,000 (Museum)</td>
<td>• 48,000 visitors per year (Library), 303,612 (Museum)</td>
</tr>
<tr>
<td>• 50 visiting scholars</td>
<td></td>
</tr>
</tbody>
</table>
Qualitative

• 32 sites contacted by phone, then email
• 11 sites visited – 46 contact hours
William Henry Harrison Home, Grouseland, Vincennes, Indiana
Rutherford B. Hayes Presidential Library and Museum, Fremont, Ohio
William McKinley Presidential Site, Canton, Ohio
Benjamin Harrison Home, Spiegel Grove, Indianapolis, Indiana
Quantitative: Survey

• Methodology
  • Identified pre-NARA Presidential & Presidential-like Libraries
  • Created and refined email list
  • Developed survey instrument
    • Web-based Survey Monkey survey
    • Short, 10-questions
  • Sent survey to 29 libraries, July 2016
  • 3 e-mail requests for participation
  • 23 participants responded (79% response rate)
Parent Institution of pre-NARAs

- Historical Society: 34.78%
- Academic Institution: 13.04%
- Government Agency: 21.74%
- Other (please specify): 21.74%
Pre-NARAs Collect These Data

(most frequently collected)

% of Response (Top 5 Responses)

- Number of tours/classes offered: 63.64%
- Budget: Income/Expenditure: 63.64%
- Number of volumes: 68.18%
- Number of visitors: 68.18%
- Size of archives/manuscripts collection: 72.73%
Pre-NARAs Consider These Data Most Useful

% of Response (Top 6 Responses)

- Size of archives/manuscripts collection: 66.67%
- Number of questions answered--on-site: 66.67%
- Number of volumes owned: books & journals: 66.67%
- Number of questions answered--online: 66.67%
- Number of visitors/readers: 71.43%
- Number of visiting scholars/researchers: 76.19%
Top Ways pre-NARAs Use Data

- Marketing and public relations: 66.67%
- Budget-preparation of next year: 66.67%
- Strategic planning: 66.67%
- Grant proposals: 71.43%
- Budget-appraisal of current year: 71.43%
- Review policies, procedures, workflows: 76.19%
- Accountability to governing board or agency: 80.95%

% of Responses
Data Required by Parent Institution

- Number of visitors
- Number of research transactions
- Expenditures
  - Staff
  - Collections
  - Other resources
- Staff size
- Collection
  - Size
  - Additions
  - Use by researchers
- None at this time
Other Data That Might Be Useful

• Core benchmarks for pre-NARAs
• Number of visitors/tours
• Total annual budget
• Total collection size
• Total staff
  • Number of volunteers
  • Number of interns
• Size of collection storage (square feet)
• Partner libraries & archives
• Use of library web site
  • Use of online catalog
Conclusions

• Challenge of identifying pre-NARAs

• Difference in reporting structure
  • Government agency
  • Academic institution
  • Historical society
  • Other

• Wide diversity
  • Some support libraries & archives on site
  • Some support libraries & archives elsewhere
  • Some have “libraries” that support only staff activity

• In addition to libraries & archives, sites include
  • Historic Homes
  • Museums
  • Scholarly research centers
Conclusions (continued)

• Results of survey provide
  • Baseline for analysis of local resources & activities
  • Identification of areas for growth & change
• Impetus for creating network of pre-NARAs
• Needs more study
Questions & Contacts

Wanda Dole - Emeritus Dean
University of Arkansas Little Rock
Interim Director of the ALPL
501.349.2049
wvdole@ualr.edu

Jack Robertson – Fiske & Marie Kimball Librarian
Director of the Jefferson Library at Monticello
434.984.7545
jrobertson@monticello.org