



What Do We Collect and Why?

Using a Self-Study to Improve Data Collection Practices

A Case Study at the University of Mary Washington Libraries

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Summer Durrant

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Project Overview

In Fall 2015, the UMW Libraries initiated a self-study to better understand and improve our data collection practices

A small working group was formed comprised of staff from different library departments (access services, special collections and archives, systems, technical services, etc.)

The working group's initial charge was to:

- 1) Compile an inventory of all library metrics collected by staff and systems
- 2) Devise and implement strategies to standardize and optimize data collection methods
- 3) Assist staff with using data to make informed decisions



Methodology/Approach

Interviewed all 26 full-time library staff using a standard questionnaire

The questionnaire solicited information about the types of data staff collect and the challenges they experience with data collection and analysis

This information was used to create a data inventory spreadsheet and set of recommendations to improve data collection methods

Staff Questionnaire

1. **Can you provide us with an overview of the types of data or usage statistics your service area collects?** Take notes on each item and follow up to find out:
 - a. **Description** – what information is being collected? (e.g., library website traffic, ILL requests)
 - b. **Collection Method** – how is the information collected? We want to know if the information is manually recorded (entered into a spreadsheet, document, online form, etc.) or automatically captured by a system like Virtua, ILLiad, Springshare, or Google Analytics.
 - c. **Storage/Access** – details about where the information is stored or accessible. Does the information reside on a server that can be queried as needed, or is it stored as a spreadsheet, document, or other format? Where are the paper or electronic files located?
 - d. **Frequency** – how often is this information captured or compiled? Examples include daily, monthly, quarterly, annually, or occasionally.
 - e. **Outcome** – what is the importance of this information and how is it used? For example, usage data may be used to support resource renewal or cancellation decisions. Also, some data may need to be reported to external organizations like ACRL.
2. **What are some of the challenges you've experienced with collecting data or being able to use data to make decisions or demonstrate impact?**
3. **Are there other kinds of data or statistical information you wish we collected or had access to?**
4. **What data do you think we could stop collecting? Why?**
5. **Do you have any suggestions or comments you'd like to share with the Data Gathering Group?**

Data Inventory Spreadsheet

Library Metric	Brief Description	Library Unit	Collection Method	Data Source	Compiled	Purpose	Reporting
Staffing							
Total Staff FTE	Number of filled or temporarily vacant FTE positions paid from the library budget	Administration	Manual	Employee Directory	Fiscal Year	External Reporting	ACRL
Librarians FTE	Number of staff members doing work that requires professional education (the master's degree or it's equivalent) in the theoretical and scientific aspects of librarianship	Administration	Manual	Employee Directory	Fiscal Year	External Reporting	ACRL
Support Staff FTE	Number of staff members without formal qualification in librarianship or other relevant specialization	Administration	Manual	Employee Directory	Fiscal Year	External Reporting	ACRL
Student Assistants FTE	Number of student assistants employed on an hourly basis in the library, including through the Federal Work Study Program	Administration	Manual	Library Supervisors	Fiscal Year	External Reporting	ACRL
Expenditures							
General							
Total Library Expenditures	All funds expended by the library from its regular budget and other sources (e.g., research grants, special projects, gifts and endowments, and fees for services)	Administration	Automated	Banner	Fiscal Year	External Reporting	ACRL; IPEDS; Petersons
Total Wages & Salaries Expenditures	Total amount paid in wages and salaries before deductions to librarians, support staff, and student assistants, excluding fringe benefits	Administration	Automated	Banner	Fiscal Year	External Reporting	ACRL; IPEDS
Total Collection Expenditures	All expenditures for materials purchased or leased by the library	Administration	Automated	Banner	Fiscal Year	External Reporting	ACRL; IPEDS
Total Other Operating Expenditures	All other expenditures not reported elsewhere	Administration	Automated	Banner	Fiscal Year	External Reporting	ACRL; IPEDS
Wages & Salaries							
Librarian Salaries & Wages	Salaries and wages before deductions for all full-time and part-time librarians	Administration	Automated	Banner	Fiscal Year	External Reporting	ACRL
Support Staff Salaries & Wages	Salaries and wages before deductions for all full-time and part-time support staff	Administration	Automated	Banner	Fiscal Year	External Reporting	ACRL
Student Assistant Wages	Salaries and wages before deductions for all student employees	Administration	Automated	Banner	Fiscal Year	External Reporting	ACRL
Employee Fringe Benefits	Contributions to retirement plans, social security taxes, medical/dental plans, unemployment compensation plans, group life insurance plan, etc. paid from the library budget	Administration	Automated	Banner	Fiscal Year	External Reporting	ACRL; IPEDS
Collection							
Books and Serial Backfiles (One-Time)	Amount expended for one-time purchases of books, serial backfiles, and other published materials	Acquisitions	Automated	Banner; Alma Analytics	Fiscal Year	External Reporting; Decision-Making	ACRL; IPEDS
Electronic Books (One-Time)	Amount spent on one-time purchases of e-books	Acquisitions	Automated	Banner; Alma Analytics	Fiscal Year	External Reporting; Decision-Making	ACRL
Ongoing Commitments to Subscriptions	Amount expended for ongoing subscriptions to serials in all formats (e.g., print, electronic, and microfilm) and databases that require an annual subscription fee	Acquisitions	Automated	Banner; Alma Analytics	Fiscal Year	External Reporting; Decision-Making	ACRL; IPEDS
Other Library Materials	Amount spent on providing document delivery and interlibrary loan services, including the cost of bibliographic management tools	Administration	Automated	Banner	Fiscal Year	External Reporting	ACRL; IPEDS
Physical Item Expenditures by Discipline	Amount spent on books and DVDs broken down by department	Acquisitions	Automated	Alma Analytics	Fiscal Year	Decision-Making	
GOBI Monograph Expenditures	Amount spent on books in GOBI; broken down by classification, fund code, or publisher	Acquisitions	Automated	GOBI Reports; Alma Analytics	Fiscal Year	Decision-Making	
Journal Subscription Expenditures	Number of titles by format, total cost, and average cost per title	Acquisitions	Automated	EBSCONET; Alma Analytics	Fiscal Year	Decision-Making	
Other Operating							
Preservation Services	Expenses associated with maintaining library and archival materials, including binding, materials conservation, de-acidification, lamination, and restoration	Special Collections & University Archives	Automated	Banner	Fiscal Year	External Reporting	ACRL; IPEDS

Manual Data Collection Spreadsheet

Library Metric	Collection Method	Format	File Location	History	Notes
Access Services					
Book Repair Statistics	Student aide records information about the number and type of repairs made to physical items in the collection	Paper; Excel	Shannon's Desk and Circulation Workroom Computer	1990-present	
Circulation Desk Transactions	Staff enter information about circulation desk interactions into Gimlet	Online	https://umwlibraries.gimlet.us	October 2008-present	Raw data can be downloaded in CSV format
Gate Count	Every morning, a staff member records the gate count number on a paper calendar. Gate count is later tabulated by week, month, and fiscal year	Paper Binder; Excel	N:\Public\Circulation\Circulation\Patron Counts	1989-present	
Evening / Extended Hours Count	Allied Barton security guard counts the number of people in the library after 9:30 p.m. by hour and floor	Paper; Excel	N:\Public\Library Stats\Circulation Stats	2006-present	Current year is kept on paper in Access Services; previous years have been digitized and are stored on the shared drive
Evening Patron Sign-in	Allied Barton security guard scans Eagle One cards of all people entering and exiting the building after 10:00 p.m.	Excel	Circulation Workroom Computer	2010-present	This used to be tracked on paper but recently moved to using a scanner. The older paper files are kept on file in Circulation
Print Serial Usage Statistics	Every evening a student aide collects the print periodicals that have been left out or placed on the reshelving cart and records the usage in an Excel spreadsheet	Excel	N:\Public\E-Resources & Serials\Stats\Circulation	2002-present	Current spreadsheet is stored on the circulation desk computer. Electronic files are available from 2013-present. Historical data from 2002-2012 are on paper in Summer's office.
Electronic Resources & Serials					
Bindery Statistics	Serials assistant tracks the amount spent and number of titles sent to the bindery	Excel	Tammy's Computer; Serials Filing Cabinet	2000-present	Older files are kept on paper ledgers
Reference					
Reference Transactions	Staff enter information about reference desk interactions into Gimlet	Online	https://umwlibraries.gimlet.us	October 2008-present	Raw data can be downloaded in CSV format
Research Consultations	At the end of each semester reference librarians compile the number of research consultations by department and course level	Excel	N:\Public\Library Stats\Library Class Instruction	2006-present	
Instruction Sessions	At the end of each semester Reference librarians compile the number of classes taught by department and level	Excel	N:\Public\Library Stats\Library Class Instruction	2006-present	Jack may have historical data back to 1996 in paper
Instruction Sessions Total Attendance	Each reference librarian collects this information for the classes he/she teaches and compiles them as needed	Excel	Reference Librarians' Computers	2014-present	
Library Instruction Evaluations	Reference librarians ask students to complete an evaluation form after library instruction sessions	Online	http://libraries.umw.edu/	2015-present	Raw data can be download in CSV format from WordPress
Public Computers	At the top of every hour, reference librarians and student aides count the number of people using computers on the first floor of the library	One Drive Spreadsheet; Excel	N:\Public\Library Stats\Computer Stats	2011-present	
Tours & Events	At the end of each semester reference librarians compile the number of tours given in the library or HCC	Excel	N:\Public\Library Stats\Library Class Instruction	2006-present	This information is recorded on the same spreadsheet as the library instruction sessions
Special Collections & University Archives					
Digitization Requests	Staff enter information about new digitization requests or projects as they arise	Excel	N:\Public\Special Collections\Digital Archiving Lab	2014-present	
Exhibits & Displays	Carolyn records information about the topic and date range of each exhibit or display in the Library	Word	Carolyn's computer hard drive	2003-present	
Rare Books	Staff enter information about each rare book that is added to the collection through purchase, donation, or transfer	Paper Binder	Carolyn's office	1963-2016	The entries in this binder are currently being transferred to an Excel spreadsheet by Carolyn's student aide
Technical Services					
Physical Volumes Added & Withdrawn	Cataloging assistant keeps a hand tally of physical items added or withdrawn from the collection, including books, media, and microforms. Statistics are kept for titles and volumes and broken down by Simpson and Stafford.	Paper	Technical Services Filing Cabinet	1974-present	Tina coordinates the collection of these statistics and keeps them on file for reporting purposes

Challenges

From the interviews, we learned that staff experience a number of obstacles when collecting and using library data. Key themes that emerged include:

- Lack of awareness about the breadth of data collection in the library
- No standardization in data collection processes
- No centralized storage location for collected data
- Data stored in library systems was not easy to retrieve or analyze
- Data was not being used for decision-making or assessment purposes



Outcomes

The most valuable outcome of the self-study was that staff gained a better understanding of what data is collected and how it is used

Improved data collection in following areas:

- Reference statistics
- Public computer usage statistics
- Print serials in-house usage statistics

Recommended purchase of a digital gate counter for more accurate patron counts

Migration to Ex Libris' Alma has provided new opportunities for automated data collection, centralized storage, and enhanced reporting



Next Steps

We continue to use the results of the self-study to improve data collection practices and assist staff with using data to make informed decisions. Current efforts include:

- Automating and optimizing data collection processes
- Integrating data collection and assessment into daily workflows
- Providing staff training on querying and using data stored in library systems
- Ensuring appropriate data collection for external reporting (ACRL, IPEDS, Petersons)
- Identifying KPIs to demonstrate library value to internal and external stakeholders





Thank You

Please contact us for a copy of the interview questionnaire or data inventory spreadsheet:

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