

Metrics with Meaning:

How we can effect change to library assessment metrics used by non-library organizations

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Objectives:

- Highlight outdated and meaningless measures still collected by publishers and other non-library orgs
- Propose changes and new metrics that would better serve the stakeholders that publishers and agencies are trying to reach.
- Describe potential ways to have short-term and long-term impact on changing these national metrics so that they better represent libraries of the 21st century.

Why us? Kirsten reached out to ARL-Assess about questions asked by publishers this year. Zoltan separately reached out to some publishers, including Peterson's. Zsuzsa, Lisa and others had been talking about another project to change how we market libraries. The four of us starting talking, we worked with Peterson's, and we engaged librarians through a number of listservs where people might be thinking about their library's image and how to market themselves.

Context: We noted the strong professional opinion and personal confidence of librarians regarding a particular outdated metric (e.g. Zsuzsa at Cornell stated that they don't even count microforms anymore), but that the publishers are still collecting that metric, and the disparity between the two. Metrics are a lot like words and images – they convey a meaning, communicate a message, get across ideas, and they project an image. This can be the right message and image to the right audience at the right time, or not. Whether intentional or not, this communication happens every time you share a piece of library data with someone, and it influences people's image of and attitude towards your library.

What are we communicating?

8,459,539 microforms



78,670,137 downloads from
repositories, ebooks, ejournals

Here we have two images, an avocado colored kitchen ensemble from the 70's, and a brand new updated kitchen with granite countertops, etc. As a home-buyer, I would be attracted to the new updated model!

If you can choose one number to represent your library, would you choose the number of microfiche your institution owns, or the number of downloads from repositories, ebooks and ejournals?

Allowing an old image to persist (such as microforms) does not do justice to the rapid updates happening in libraries. Not only does an outdated image affect the promotion of our services to patrons, but it also affects our ability to negotiate with administration, and the value they see in us.

Good News: Library Community Initiatives

Attend any conference → exciting new directions!

- Individual projects and initiatives
- Consortium and group initiatives
 - Multi-institutional projects
- ALA, ACRL, ARL initiatives
 - Recently updated ARL/ACRL survey
 - Professional organizations supporting current issues
 - e.g. NCES/IPEDS task force & recommendations

The good news is that we have been having this discussion as a library community for a long time.

Year after year, there are new and exciting directions at each conference, showing our individual initiative,

and also showing the flexibility and nimbleness of our professional organizations (ALA, ACRL, ARL, etc.) to put their efforts and resources behind funneling these new directions into industry standards.

ARL updated their survey

NCES updated the ALS as a mandatory part of IPEDS,
ALA/ACRL/ARL initiative to improve the IPEDS definitions

Challenge: Entrenched Statistics

Potential for outdated statistics to endure...

- Accreditation agencies
- Publishers, college guidebooks

Peterson's Guide to Colleges

Wintergreen Orchardhouse

Princeton Review

Challenge: The old image is still hanging around, because entities for many years have relied upon our old metrics that libraries actively used in the past.

Accreditation agencies

Publishers – focus of this presentation.

Peterson's – case study.

In the past year, there has been a community discussion on the ARL assessment listserv about the outdated metrics still being collected by Peterson's, the company that publishes Peterson's Undergraduate Guide to Colleges. Peterson's is a well-respected and widely-used source of college information, a publisher that has been consistently gathering library data for decades.

Peterson's demonstrates the continued need to consider the image of libraries, as portrayed by entities outside of the library community.

FS1. Libraries

- a. Main library name: Limit: 70 characters
- b. Number of other libraries on campus:
- c. Number of books, serial backfiles, and government documents (paper and electronic titles) that are accessible through the library's catalog - include bound periodicals and newspapers and exclude microforms:
- d. Number of e-books:
- e. Number of microforms (units):
- f. Number of audiovisual (units):
- g. Does your library maintain an On-line Public Access Catalog (OPAC)? Yes No n/a
1. If yes, is it accessible from computers other than those located in the library? Yes No n/a
2. Are other college library catalogs available through your OPAC? Yes No n/a
- h. Does your library maintain its own World Wide Web page? Yes No n/a
1. If yes, does your library provide electronic reserves on its Web page? Yes No n/a

So let's take a look at Peterson's library survey.

Last year their request for data included questions such as: number of microforms – Does your library maintain an On-line Public Access Catalog (OPAC)? – If yes, is it accessible from computers other than those located in the library? – Are other college library catalogs available through your OPAC? – Does your library maintain its own World Wide Web page? – If yes, does your library provide electronic reserves on its web page?

These questions (in today's modern library landscape) are like having an old avocado-colored fridge representing a brand new updated kitchen.

Overcoming Inertia

Decades-long reliance upon customary stats by outside entities

- Business processes draw upon officially available data
- Infrequent review of processes (resource constraints)

Frequent, dynamic communication among librarians

- Active sharing of ideas at conferences, committees, etc.
- Active discussions in listservs, webinars, emails

→ Meeting of the Minds!



How can we overcome this challenge?

We have two groups – one very slow to change because of their priorities and resource, and one very dynamic with frequent discussion and sharing of adjustments. If the two are in communication, we can make progress.

Need for meeting of the minds!

What May Keep Individuals From Taking Action?

With all the initiatives, why do outside agencies still use outdated metrics?

- Crowd psychology (“Somebody should’ve told them by now”)
- Higher priorities (“They’re not on my lengthy to-do list”)
- No authority (“ARL or ACRL should tell them”)
- No consensus (“What would we tell them?”)
- No regular contact (“Who would we talk to?”)

Start with an FYI... Expand our circle of communication!

Internally, we have established common consensus about forward directions, why not externally?

Perhaps the external communication of these directions, to entities outside of the library community, have been low on our long list of priorities.

Or, perhaps as a community we have relied upon our advocates (ALA, ARL, ACRL, etc.) to do much of our official communication for us, and perhaps individuals did not feel they have authority to put their initiative to such efforts on their own.

It may also be that the widely varying personalities of our individual libraries make it difficult to have a consensus about measures to be used.

Negotiating Change = Providing a Service

Evolution: Negotiation begins with a position of knowledge

- Don't need all the answers to begin
- Just need a willing counterpart

Peterson's Undergraduate Guide to Colleges

- Needs of clients, target audience, consumers
- Business process constraints, data sources
- Good data is good business

Any guidance that improves their business is appreciated

How can be a good motivation for initiating communication?

A good paradigm for librarians to consider is the concept of negotiating change as equivalent to providing a service. Providing a service comes naturally, and if we recognize that another party would appreciate input as a service we are offering, they may be very willing to participate in a discussion.

Evolution of our discussion and conference call with Peterson's:

Discussion of their needs and constraints, and finding that for them also, it's about good data.

They know when data is good or bad, and in fact limited the use of the outdated data.

Through our conference calls, emails and edit process, Peterson's appreciated updating their data.

Peterson's Library Survey (after conference calls, edits)

	Physical	Digital/Electronic
c. Number of books	_____	_____
d. Number of databasesN/A.....	_____
e. Number of serial titles	_____	_____
f. Number of weekly public service hours:	_____	
g. Does the library have study areas open 24 hours a day, either 5 or 7 days a week? (Yes/No)		
h. Does the library allow students to reserve study rooms? (Yes/No)		

As you can see, Peterson's will be collecting and distributing a much more relevant set of measurements,

both in their representation of the libraries, and also in their usefulness for prospective undergraduates, parents, and guidance counselors.

Win-Win Outcome!

Discussions revealed potential for mutual positive benefit

- More relevant set of metrics: better for Peterson's, better for libraries
- Better data: increased data sales, improvement in library image

Peterson's Undergraduate Guide to Colleges

- Survey questions before discussion
- Survey questions after discussion
- Potential for future updates

It may have been bold for a group of 4 individuals to tackle, but the process was very straightforward.

And ultimately this effort to reach outside of the library community resulted in a great win for all involved.

What measures are we collecting nationally that we can propose to Peterson's to include in future updates?

The work with Peterson's resulted in an improved survey, but also a great potential for future improvements.

Metrics: The Wording Makes the Number

“Recently renovated”

vs.

“Renovated in the past 5 years, or plan to renovate in the next 5 years”

- How a library might answer the question (what is “recent”?)
- How the answers can be interpreted (what does 60% mean?)

A simple percentage, by its wording, can be constructed to represent anything.

Wording clarity = Metrics with meaning!

As we explore the complex terrain of creating library metrics, and the possibility of potential future metrics, let’s consider a reminder to harness the power of word choice:

Keep the statistic simple (% , count, etc). But use the *wording* to clarify and give meaning.

Proposed Metrics

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Asked librarians: What kinds of metrics would you consider “meaningful”? (in the context of Peterson’s Guides and Princeton Review.)

We got many replies, ranging widely from things that were very particular to a single institution (such as, “do libraries have a personal librarian assigned to each student as freshmen?” or specific use numbers for smartboard technology installed in the library) to very traditional output measures, like number of reference transactions.

Individual libraries can use some of these, but not really potential for all libraries.

Framework for Metrics

Standardize across all libraries



The BusyBrain Apples & Oranges. They don't compare

Know your audience



John Lee "Guide Me"



"Just One Minute" Penn State 4/8/2009

Parameters for what metrics would represent the library of the 21st century, across the board: 1) Know your audience! Peterson's focus is on a wholly different community: prospective students and parents. 2) Standardize the metrics across all libraries.

Many suggestions from our request:

- Outcomes data? Would the fact that if you use the library, you are more likely to have a higher GPA mean something to someone trying to choose a college? In general outcomes measures would hold more meaning for campus administrators than potential college recruits. And the body of literature on VAL seems to be in its exploratory stages and many of these studies need to be replicated at other institutions, too, before we can truly standardize them.
- Outcomes measures a little complicated anyway, because there are some arguments that students with the better GPAs may already have had better study habits, or had learned to use the library before. Is it really the library? What makes the library a positive attribute of the school when choosing a college? Maybe the better use of these outcomes metrics is to use them in enrollment and recruitment marketing in our own unique context.
- Study by Emmett Lombard in 2012 that said that libraries are not of any import in college choice.
- UCLA's "The American Freshman" survey found that incoming students' concerns are with the college reputation, getting financial aid, price of tuition, and rates of employment directly following graduation. The library doesn't really fit into that list either, except maybe by contributing to the college reputation.
- Parents want to know that their kids will be taken care of, so our values of personalized help, stress relief, and creature comforts may resonate with parents. But how can we make those subjective measurements standard across all libraries?
- Even, CARL, the Canadian Association of Research Libraries did try to standardize such simple things as seat count and staffing figures, but then ended up rejecting those because they were so difficult to standardize.
- Some metrics could easily be misleading, even if we could standardize them. As one example, she specifically said that on a campus where students are required to have laptops, a library wouldn't necessarily have many or even any to lend. And whether it's a residential, commuter, or online campus would also impact whether the library felt the need to loan laptops. So a metric like laptop lending would be skewed depending on the type of campus.
- What do prospective students even say about what they want? We learned that Peterson's doesn't ask; they just use what libraries have already decided are important, based on the NCES standards.

Spaces and Equipment

- 24/7 or 24/5 space availability
- Renovated in the past 5 years, or plan to in the next 5
- Availability of equipment in library, or for checkout
- Availability of major and expensive software and hardware
- Percentage of textbooks and course materials on reserve
- Free or low-cost printing and scanning services

Spaces and equipment

- Space is an important question in libraries now, as people less familiar with libraries can't understand why libraries need space if collections are becoming digital. So what metrics will really show the value of space, either to prospective students and parents, or to communities as a whole?
- Availability of spaces open 24/7 or 24/5? Just the existence of those spaces may be meaningful to prospective students
- How recently spaces have been renovated would appeal to people?
- To make it more meaningful the metric could ask whether a college has any library that has been renovated in the past 5 years or will be in the next 5.
- A major concern for students and parents is actually ways to save money. People had some suggestions for that, such as whether computers are available in library spaces or for checking out.
- Expand it to other equipment check out such as headphones, chargers, high-end calculators, or cameras.
- Availability of major and expensive software packages and hardware may be pretty meaningful to everyone.
- Having textbooks, coursepacks and e-reserves is also an important money-saving aspect of the library. With textbook costs on the rise, a library that enables students to borrow these is a big winner.
- Those rising costs for students also make this hard to sustain for libraries. Also, what is the metric? Yes or no, we have them? Many libraries can only carry some. Maybe the metric is the percentage of textbooks on reserve.
- Having free or low-cost printing and scanning services is a win though.

Services

- Reference counts (in-person, virtual)
- Instruction counts (classes, people reached)
- Number of credit courses
- Availability of virtual help services, or # hours of virtual help
- Number of one-on-one conversations between librarians and students
- Percentage of all library staff with MLS or other advanced degree

Services

- What about the importance of library staff, and what value they add to a college or university? The easiest metrics to gather are outputs, which we collect regularly for our standardized reports, like in-person and virtual reference statistics, instruction counts and people reached. But do they have value for potential students?
- Focus on potential impact? For example, the number of credit courses offered by the library. Maybe the idea that a library offers credit courses gives some sense of support for students' research efforts. Some of the original outcomes research does tie library instruction to measures of student success, but it doesn't seem as though these bring us any closer to metrics that would entice a potential student.
- Reference services? We put a lot of energy and effort into being available to our students when they need help. Focus on virtual service hours? Of course, ARL and ACRL have recommended eliminating the virtual reference statistic in the IPEDS survey.
- The number of one-on-one consultations librarians have with students? The problem with consultation numbers is again our audience. Would they understand the meaning or value of these?
- Maybe the way to address the value of staff services is through the personalized stories of current student tour or orientation leaders who have been helped by these services. People suggested a number of other good service metrics, but I think that these numbers without a personal story behind them may not be as meaningful.
- To express the value of the efforts and *expertise* of library staff in this list of metrics for marketing purposes, we really need a way to express the creativity and innovative value of library services into at least one metric. The library really provides a service to the community because it is a locus where ideas cross-pollinate. How about a metric that describes that interconnection, one that capitalizes on the advanced degrees of the library staff, like what percentage of all library staff have an MLS or other advanced degree? Gets the qualitative value of staff into a more quantitative measure.

Collections and Access

- Number of databases, serial titles, and e-books, in addition to number of print books
- Number of web site visits, number of sign-ins
- Amount downloaded or printed
- Digital/institutional repositories and their usage or downloads
- Major, unique collections
- Scholarly output of faculty and graduate students
- Ratio of unique users of the collection to student population
- Collections size relative to student population

Collections and Access

- We got Peterson's to agree to a major change to the number of print books. They will be adding the number of databases, serial titles and e-books which libraries have as well.
- Some people suggested that we include the number of website visits or number of sign-ins, downloads or printed items.
- Report on digital/institutional repositories and their usage or downloads.
- All of these may be less useful to people who are not used to considering those figures.

- List major or unique collections. That would be more meaningful in distinguishing one university from another, but it's really hard to envision an actual metric that would represent that reasonably.
- A nontraditional metric that describes the depth and quality of library collections might be meaningful, one that looks at scholarly output of faculty and (at least) graduate students. This goes beyond traditional measures of volumes added or amount spent.
- Another less traditional option -- the ratio of unique users of the collection to student population. But not easy for all libraries to determine.
- A ratio of collections size relative to student population? If we define what "collections size" means so that it is comparable across institutions, that would be a ratio that could have impact.

Student Engagement

- Student employment opportunities
- Availability of writing or other non-library services in the library
- Pleasure reading collections
- Media/films
- Cafe space, food/drink allowed in the library
- Availability of makerspaces

Student Engagement

- Outreach efforts that promote student engagement with the library and therefore the school? Would potential students and their parents find that interesting? Research does show that engagement leads to student retention.
- Libraries really do a lot of work to engage students in university and college life.
- Work study positions or other student jobs in the library. Student jobs gets at the “how to fund college” question. Maybe a metric that specified number of jobs available would be powerful, rather than are there jobs available or not?
- Availability of writing services and other non-library services?
- Whether a library has pleasure reading collections or media/films. That answer might apply to the “creature comforts” element of the library that we mentioned above.
- Having a cafe space and the allowance of food and drink in the library would also fall under “creature comforts.” But that is almost a given in many libraries? Know of some faculty who are actually against taking up library collections space with a cafe. I could see this having value as a “do you or don’t you have it” question.
- The availability of makerspace in the library was another great idea, if we could be sure that the terminology was actually meaningful to the audience.

“Ask yourself, would you report this number if you think it might make your library look bad? If not, then you're not doing assessment. You're doing public relations.” –*Jim Self, at Library Assessment Conference, Charlottesville*

- Seems to be an exercise in public relations and advocacy.
- Many of the indicators that were shared seemed more important to libraries and campus administration
- Need to advocate for student-driven metrics. We need to ask what students and parents want when they look at colleges and libraries. If it includes cost-savings, then we need to find ways that the library saves the student money and market that.
- However, if this audience tells us that libraries are at best a minor factor for college choice, then should we even invest a lot of energy in advocating to students why libraries will be important to them? Maybe our advocacy focus should be on other metrics, such as how libraries figure into college rankings such as the [U.S. News and World Report](#) ranking system? Though this ranking relies heavily on a measure of College reputation (see Gladwell, 2011).
- At FSU, we ignored the reputation factor and looked at the *USNWR* top 25 public institutions and compared their library expenditures with our own. We found that they spent a lot more money on their libraries per student FTE. And, yet, as far as a good education at a lower cost, FSU is less expensive than the top ranked colleges.

Our Suggestions for Potential Metrics

- 24/7 or 24/5 space availability
- Availability of equipment in library, or for checkout
- Availability of major and expensive software and hardware
- Percentage of textbooks and course materials on reserve
- Percentage of all library staff with MLS or other advanced degree
- Number of databases, serial titles, and/or e-books, in addition to number of print books
- Collections size relative to student population
- Student employment opportunities
- Food, drink and amenities availability within the library

Our suggestions:

- Many library metrics we could use to “sell” the college to a prospective student and their parents.
- List of all suggestions we received will be available.
- After some discussion amongst the four of us, here is a short list of the ones we thought might be the most likely possibilities. Of course, these are just an initial draft.
- This list focuses on our two main parameters -- “know your audience” and “is the metric standardizable across libraries.” Beyond that, we continued to argue about all of these. For example, if we include “renovated in the past 5 years,” someone could say that renovations are not always a sign of a well-designed library.
- Or, if we choose to use the percentage of advanced degrees among library staff to illustrate our expertise, someone would argue that an advanced degree doesn’t necessarily make a good librarian. And of course, beyond that, we still don’t really *know* the audience of incoming students and their parents.

Advocacy



Photo taken from henryjenkins.org

1. Grassroots advocacy **starts with a question. Who is collecting this data and for what purpose and audience?**
2. Such as, why are we still counting microfiche for Peterson's Annual Undergraduate Survey?
3. It is a **Proactive process where we blaze a new trail** (gather others who are asking the same question in the library community)
4. **Mediate** (initiate communication process with non library organizations)
5. **STOP:** When do we rely on ARL/ACRL to be our Advocates (IPEDS)? Are these associations our primary vehicles for change?
6. **Engage and Negotiate for change.** (with non-library organizations/publishers/outside entities)
7. **Feedback loop:** How can gather collective confirmation from the library community that these suggestions are good for libraries?
8. Some data can be leveraged to help or be in favor of libraries; some data is just not useful for our purposes or too esoteric, so what really impacts us.
9. Advocate for the audience that the data is being collected for! HAVEN'T SPOKEN TO POTENTIAL STUDENTS about SECURITY

Next Steps

- Broaden to non-academic libraries
- Influence other agencies to change what affects us
- Other advocacy efforts

Thinking about moving forward, there are a few more things that we might consider.

- Because we started with academic libraries and guides like Peterson's and the Princeton Review, etc., we have focused our thoughts on a very particular market. But if we are really looking to find metrics that unify libraries across the disparate types, then we need to include public and special libraries in this discussion as well.
- Some issues arise when non-library agencies make decisions that affect us. For example, there is a discrepancy between how the SOC codes for librarians and library technicians don't actually match the way our library jobs are defined. The SOC codes are how govt. authorities determine what counts as library staff, and on the IPEDS survey, this really has impact. Does it have impact in this context as well?
- There are some other groups who have used grassroots efforts to change how we collect information to market the library. The National Survey on Student Engagement (NSSE) now offers a library module, with questions beyond the typical library facilities questions. A small group of ARL Libraries (COFHE libraries) has begun to use its NSSE equivalent survey to ask similar questions at each institution, again, to find some ways to get common information about libraries across schools. And LibQual libraries have been comparing and sharing their data in a variety of ways. These are all models that we could consider as we move forward.

Closing and Q&A

- How can we band together to take action as a larger community to improve the metrics that represent libraries?
- How are routine metrics damaging how libraries are perceived by our constituencies?
- How do you advocate in your own libraries for more meaningful metrics in a variety of contexts?

Now we open it up to you all. How can we move forward? What kinds of questions do you have?

Outcomes from today:

Three learning outcomes: Audience members will

- Be motivated to band together to take action as a larger community to improve the metrics that represent libraries.
- Have an enriched understanding of how these routine metrics are damaging how libraries are perceived by our constituencies.
- Advocate in their own libraries for more meaningful metrics in a variety of contexts.

Thank you!

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