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Newsletter for
Librarians and Management

The
One-Person
Library

# STATISTICS AND LIBRARY ADVOCACY

## A REPRINT FROM *THE ONE-PERSON LIBRARY: A NEWSLETTER FOR LIBRARIANS AND MANAGEMENT*

### Keeping Statistics Can Help You Keep Your Job
### by Judith Siess, *OPL* Editor

A discussion on the MEDLIB-L electronic list on if, why, and how librarians keep track of their online searches prompted me to write this article. Coincidentally, I read an article by **Julie Still** [Rutgers University, Camden, New Jersey, USA] that put my line of thinking into print. Says Still, "A resourceful librarian can use careful record keeping to promote her work now, and also to collect and to verify the experiences she'll need for the next step in her career." (Still, 5) She goes on to emphasize the importance of keeping meaningful statistics. "It's one thing to say, 'I created an online research guide;' it's another to say how many times it has been used and if other institutions have linked to it. It's one thing to say that a decline in reference desk statistics is made up by the increase in e-mail questions; it's another to state specifically how many students have contacted librarians by email. But we seldom collect and correlate this data. Administrators want to be able to speak well of the librarians and staff. Let's give them the hard data to do so." (Still, 4)

But what kind of records should we be keeping? Here are some of the suggestions from the MEDLIB-L list, based on the summary by **Michael Sholinbeck** [Sheldon Margen Public Health Library, University of California, Berkeley, USA]

**Some librarians keep records only for statistical summaries.**

Number each search as it comes in, so as to have a running total. Enter monthly total on a spreadsheet to keep track of whether the number of searches is increasing, decreasing, or remaining the same.

Keep track of searches by title of requester, purpose of search, and resources (databases) used.

Used to keep detailed records, but stopped doing so and discarded all of them, including old ones, because of the Patriot Act.

**Others use them to track or improve customer service.**

Note date and time search request was received, date results were needed, and date and time results were delivered to make sure customer deadlines are being met.

For a difficult search, cut and paste search history into a document, note zero results. Useful if you're asked to do the search again—or a similar one. Also keep details when dealing with difficult or micromanager clients.

Note date requested, date completed, requestor, and topic—to jog your memory when you see something pertinent later but can't remember to whom it should be sent **and** to see percentages of searches done for various groups (physicians, administration, nurses, other staff, etc.)

Keep track of number of searches and number of databases, assign subject—used by CME committee for needs assessment for grand rounds and other programs. "It's been a big hit."

Keep track of all reference questions over a specified period (such as four months), for program planning and training of new employees—or customers. Develop training modules or fact sheets/pathfinders/web links to aid answering of most common questions, using real-life examples. Remember to maintain confidentiality. Note trends in user demand for specific types of resources.

As a solo in a healthcare consulting firm, keep detailed records so someone can take over in case something happens to you. So someone can take over and to avoid getting calls when on vacation. Keep track of time spent on each project for time sheet and billing. Also, keep track of questions asked that took over 10 minutes and where the answer was found—in case one is asked again.

Cut and paste every bibliography in full, including any full-text articles and save under requestor's name and subject of the search. Helpful in determining whether to maintain hard copy (or any) subscriptions to journals.

Keep track of searches for annual reports and "to see what you have accomplished."

Report number of searches to "justify" your employment. Also, if someone stops you in the hall and says that the search you did last week was helpful, you can refresh your memory on which one it was.

**Finally, a few very wise librarians use the statistics as marketing tools, as suggested by Still.**

Keep track of how results were delivered (fax, interoffice mail, hand delivered, post) to document performance improvement, customer service, cooperation among departments—"all of which seem to be of interest to JCAHO these days."

Document time spent on searches to show how you are saving the time of administrators and managers "who don't have time nor skill to search" on their own.

"Every day on my way home I take a minute or two to record what I did that day…. At the end of every month, I compile this into a monthly activity report, designed to reflect my primary job responsibilities." (Still, 4)

**What Should YOU Be Doing?**

Keeping statistics or records takes time—time you can't afford to waste. Don't keep statistics just for statistics sake. If they are not mandated by an outside authority (including your boss) or if they aren't used to "justify your existence," then don't track them. For instance, just writing in your monthly report that reference desk inquiries are down and web site hits are up is a waste of the time of both you and the reader. Explain **why** questions are down and web use is up; explain what the numbers **mean**. For example, "reference requests are down because more customers are finding the information they need on the library web site."

Keeping track of who is using your services, and where they fit on your institution's organization chart, can help you make sure you are serving the decision-makers and people involved in the strategic goals of the institution. Critical departments not asking you for assistance should be targeted for a library marketing campaign, including personal visits with their personnel.

Whenever possible, back up statistics with stories—specific examples of how information provided by the librarian contributed to the strategic goals of the organization or the company's bottom line. Collect testimonials or comments from satisfied users, even if you have to ask for them. Words speak much louder than numbers! These stories should be included in monthly and annual reports and used liberally in marketing programs.

To summarize, should you keep track of online searches? Yes. Why? To make sure that the powers-that-be, the people who make decisions about the continuation of your position, know how you and the information you provide contribute to fulfilling the purpose of the organization. And how should you keep them? Keep only those that contribute to the goal above and keep stories as well. You don't have time to waste on meaningless numbers.

**Read More About It**

Still, Julie, How Resourceful Librarians Can Keep Records to Promote Their Work, *MLS: Marketing Library Services* 19(3):1,4-5, May/June 2005.

*The One-Person Library: A Newsletter for Librarians and Management* 22(10):5-7, February 2006


## Which Statistics to Keep?
### by Judith A. Siess, *OPL* Editor

Every librarian keeps statistics—lots of statistics. But which of these **should** be collected and which should be discontinued? Obviously, we should keep those statistics that are useful and help to show our value. But how to determine which these are?

This was the subject of a discussion on the SOLOLIB-L electronic list last year. Here are some of the ideas presented by your fellow solos and my comments.

Statistics commonly collected fall into the following categories.

**Circulation:**

- Total number of items checked out for a given period
  - Items checked out by person or department
  - Items checked out by subject (using broad call number categories)
- Average number of check-outs per library item, such as four per year
- Total number of items out at any one time (**John** Welford, formerly of Marconi, Coventry, UK, reported this as a snapshot taken at the same time each week)

Numbers about how many books were checked out, questions received, documents ordered, etc., is less impressive than saying...I provided information to Ms. ABC for the XYZ project, or I send out a news service, that all the VPs read or I created a database of technical reports for the R&D staff.

It is a good idea to show how the collection is growing and to show that the books are going out the door. I once heard that the "perfect" library would have NO books on the shelves. They would all be so relevant that they would all be checked out. I have found that what is relevant is either checked out or "stolen" and what remains, except for reference works, is not very useful. I always tracked circulation by user and department. If you ever get your budget reduced (and who hasn't) it gives you ammunition to go to that department and say, "your people constitute 25% of my users. Wouldn't you like to come up with 25% of my funding so I can continue to serve them?"

**Natasha Bergson-Michelson** [The McKenna Group, Mountain View, California, USA] said, "there is another reason to track users by department, if you can. At a former job, department heads used to actually come to me to find out if their department was being as productive as other departments, that is, using me! So, I started compiling a departmental usage report that I distributed to all the directors and to my boss. It was the most effective marketing I did the whole time I was at the company."

**Document Delivery:**

- Interlibrary Loan
  - Number requested
  - Number supplied
  - Number unfilled
  - By format (articles, books, films, etc.)
  - By supplier (In addition, I tracked the cost and the time to receive the loan; so I could determine preferred suppliers.)
  - By person or department
- From other suppliers:
  - Number downloaded from the Web (with source)
  - From commercial suppliers (keep statistics on cost and time to receive)

You might want to add ILL to other forms of document delivery and report them together. Be sure to say how much you save the company by using ILL instead of a commercial document delivery service. (If ILL isn't saving you much, outsource everything to a commercial service and buy yourself some time!)

**Technical Services:**

- Overdues processed (and amount collected; so you can decide if it's worth it)
  - Number of items overdue at any one time
  - Customers with large numbers of overdues
- Number of invoices processed
- Acquisitions
  - By type of material
  - By subject
  - By requestor (person or department)
  - Number ordered for library vs. number ordered for other departments
  - Inventory of books by subject and/or publication date

One librarian compares inventory with search requests by subject statistics and the top ten subject searches for the year. He then comes up with a plan to purchase books in specific areas that need upgrading based on these reports as guidelines.

Keep a log of the books you order. If you don't, how can you tell if they are in or not? I always kept a log with title, requestor, estimated price, actual price, savings by using that vendor, purchase order number, who's paying, vendor, date ordered, date received, date paid (so you can find open PO's where the material has come in but you haven't been billed). I also reported the savings by having monthly bills from the book jobber vs. individual bills for each book from the publisher. At about $75 per check generated by the accounting department, this really adds up. I also used this log to quickly tell a customer the exact status of his or her order.

**Serials:**

- Number of titles
  - By subject
  - Whether for library or for other department
- Time involved in renewing serials

You will want to track circulation and usage (in-house) by title, so you can justify the expense of each serial. Also, if you log the number of uses by department, when your budget gets cut you can make a case for asking the primary department using a specific title for help paying for the subscription.

Knowing how much time you spend renewing serials can be very helpful when justifying the use of a subscription service, which, as we all know, does not save money, just time. By your doing it for the organization, you save the time of all the people or departments using the title.

Research:

- Number of reference questions
  - Quick reference (directional, informational, less than 15 minutes)
  - Research questions (greater than 15 min.)
- Number of literature searches
  - Online vs. paper-based
  - In-house resources or external
  - Current awareness
  - By subject, person, department
  - By time spent

**Access:**

- Number of visits or requests
  - by mode (in person, email, telephone, via website)
  - by source (external or internal; department or person)
  - by purpose (browsing, checkout, reference/research)
- Number of visits in a given time period
- Number of hits on library intranet or Web page
  - By screen
  - External or internal customer

I'm not sure how useful tracking just the number of hits on your intranet or Web page would be. It would help **you**, but management might not be very impressed unless you show that, say, the library gets twice the hits on its pages as some other department.

**User Education:**

- Number of training sessions given to customers

- By subject (Internet/Web, library resources, orientation, research methods, specific databases)
- By department

**General Comments:**

Statistics come in handy for those times when you haven't done anything spectacular. It is always easier to collect a statistic and not use it than decide you need one and have to go back and create it. Most can be collected electronically through automated systems or, at worst, don't take long to jot down as they occur (such as questions answered, documents ordered, etc.).

"Someone once told me that one statistic that I should try and track regularly is the amount of time that I saved the engineer that I did the research for. That amount of time saved multiplied by the hourly rate of the engineer provides a sometimes stunning amount of money, but it is something that mgmt. can relate to quite easily. I will also state that this dollar figure is only one of the statistics that I collect. I also do the other statistics that have been discussed on the list, but the question that seems to get me the most respect from management is the dollars saved." **Sara Davis** [Jacobs Engineering, Houston, Texas, USA]

Yes, this is a nice way to show your value--IF the company 1) believes your figures and 2) cares. My former employer did not care about time saved since they didn't pay overtime and if the engineers had to spend extra time looking for information it didn't matter to management. (Of course management never figured out that the engineers would just not look for the information or would quit looking if they didn't find it right away.)

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## Those Darn Statistics

### by Judith Siess, Editor, *OPL*

> "There are three kinds of lies: lies, damn lies, and statistics." attributed to **Benjamin Disraeli** by Darrell Huff in *How to Lie With Statistics* (NY: WW Norton, 1954)

A while back a question appeared on the SOLOLIB-L electronic list asking how librarians that do not have automated circulation systems keep track of circulation statistics. Answers ranged from a simple hand tally or a clicker to a more sophisticated system using Excel spreadsheets. Uses for these statistics varied from just watching to see if circulation is going up, down, or holding even from month-to-month and year-to-year, to determining which periodicals to renew, to keeping track of what goes out and what type of materials they are.

Another list had a discussion on keeping reference statistics. One librarian wrote, "what you count, and how you count it, depends entirely on what you want to do with the data. For example, if you've been answering the phone at the reference desk and are

thinking about answering it someplace else, you would want to indicate how questions come in. If you're thinking of changing what sort of person (what skills) staffs the reference desk, you'd structure your categories based on the skills needed to answer questions. If you need to consider different staffing levels (number of people) working the desk at different times of the day, you'd want to keep track of questions by time of day. If you're thinking of changing what's on your web site (like adding your journal holdings), you'd want to separate holdings questions about books from questions about journals."

Think about whom will see, or need to act on, the results of your study. If you have to present to researchers, you will need greater detail than if you're just keeping the statistics for in-library use. One library limited the statistics it keeps to those required by the organization to which it reports.

Another librarian said she didn't record who asked a question, only the service provided. She divides services into four categories: Machine or Computer, Informational or Directional, Ready Reference, and Research (taking over ten minutes to answer) She also does not distinguish among in-person, email, or phone questions.

Sometimes a question may overlap categories, for instance, helping someone do a search, then explaining the printing process, and then telling them where they can find the journals. One librarian said that if the question leads to any form of instruction, then it is counted as training.

Another statistic you might want is the time expended per question. One library divides this into four groups: 1-5 minutes, 5-10 minutes, 10-20 minutes, and over 20 minutes. They also track time of day, by hour. (I would suggest only doing this for a limited time, to get a rough idea of the distribution of questions. You could spend a lot of time gathering and analyzing data and not add much value.)

Keep it simple! It's very easy to make a tally grid that's so intricate that the recording takes longer than answering the questions. One librarian reported doing a trial week (which also gets the bugs out of the form) and then a real week, and repeating the real week maybe once a month for a few months. Then stop for a while. Which weeks or months you choose will also vary with what you want to study. For instance, in an academic library; the beginning of a school year would likely give different data than the middle of a semester, or a holiday period.

Another librarian had a very simple technique. She uses brightly colored 3" Post-It® notes on which she writes the request and requestor. She just tosses them in a small box and at the end of the day, or early the next, adds them to a spreadsheet listing department, type of question, a one-line description of the request, sources consulted, and any notes. Once she's added the information to the spreadsheet she tosses the notes. The results are saved monthly, tabulated quarterly, and summarized annually.

It is much too easy for librarians to get caught up keeping statistics for the sake of keeping statistics. Keep only those that are meaningful to you and/or your management. (However, it is a bit better to err on the side of keeping statistics. It's easier to ignore them than to have to go back and create them.) Also, resist the temptation to over-analyze things. Things that **may** be meaningful: number of items circulated, by type (book article, journal), by department (especially those departments **not** helping to pay for the library), by subject (to see holes in the collection), reference questions answered, by type (quick reference, online search), or break searches down by database (to see which can be

dropped easily). You may also want statistics on the cost of searches (especially if the library is absorbing all costs), by department (see above), turnaround time (a good metric to try to improve), and by method of submission (phone, in person, email, website). I always kept track of all items ordered, by type (books, journal subscriptions, document delivery), by requestor (as above), turnaround time, and cost (to assess which document delivery services are cheapest/fastest). I strongly urge you to keep track of **all** monies spent by the library, whether from library funds or departmental funds. This is the total amount of money controlled/handled by the librarian—always a good number to have at hand.

Another trap to fall into is over-analysis of the statistics you keep. With computer spreadsheet programs, it is very easy to analyze information sixteen different ways and make graphs, charts, and other pictorial depictions. But are these really meaningful to you or your manager? You can spend a lot of time—which you do not have—and still add no value. (I have often been guilty of this. I love playing with spreadsheets.)

Statistics can serve a valuable purpose—proving your worth to your parent organization. When presenting your case to management, you must use techniques and terms that they understand: cost-benefit analysis, unit-cost analysis, value added, and the like. Use spreadsheets to illustrate your points. By using statistics and relatively simple calculations you can show that the value of what you do easily meets or exceeds the amount your institution spends on the library (including salary and benefits, the collection, subscriptions, online services, floor space, air conditioning, water/sewer, and telephone). But you must be specific and have the data to back up your case. One law librarian showed that she saved the law firm the cost of her salary and benefits simply by checking the invoices from the legal publishers. The law firm had been paying all of the invoices—duplicates and erroneous ones as well as the correct ones. A hospital librarian can show direct cost savings achieved by reducing a hospital stay or diagnostic tests, or by saving clinical staff time and thus increasing their productivity. One medical librarian used the example of a nurse who spent two hours searching the literature and found only five pertinent articles. The librarian found forty relevant articles in only five minutes. When costed out, the articles the nurse found cost over 150 times as much as the ones found by the librarian. (Unfortunately these savings—of time—are soft savings. To be really valuable, you need to show how these timesavings result in the reduction of headcount for the organization.) But it's a move in the right direction.

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## Measuring Your Performance

**Joan Yanicke** [St. Vincent Hospital/Worcester Medical Center, Worcester, Massachusetts, USA] asked the MEDLIB-L electronic list about what statistics they kept. She summarized, "The answers sort of fell into two camps: the minimalist group and the 'count everything' group. The minimalist group counted the things we have all counted forever and maybe a few more. The count everything group tended to see it from the perspective of being able to use the numbers to build the case for more (fill in the blank) or to maintain (again fill in the blank) or for their own trending and building perspective.

"I got a really interesting response from someone in a special/corporate library who collects some of her statistics in a way similar to lawyers. She tracks time in five general categories as well as tracking project work. I found that useful for some of the things that I do on a sort of project basis such as the web design and page maintenance for the library websites and several other areas. And I believe I may incorporate more of this into my statistics when I have more time to work it through.

"There were also comments about the importance of keeping track of the following, in addition to the regular stuff: telephone calls, meetings attended, education/programs/publicity provided, and electronic resource usage.

"The real summary is this: keep statistics based on what you are going to do with them. If you are doing it as a perfunctory process, minimalism is fine. If you want to support a change, a service, or a process, then think about what you need to have in order to do that and start counting."

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