

Statistics Gathering

Monthly Statistics for Public Services
Department of Special Collections

NAME: _____ MONTH/YEAR: _____

ON SITE:

TELEPHONE	E-MAIL	FAX	WALK-IN	LETTER / MEMO

OFF SITE:

TELEPHONE	E-MAIL	FAX	WALK-IN	LETTER / MEMO

CLASSES GIVEN:

SESSION	NUMBER OF ATTENDEES

<p>Penn State </p>	<p>Special Collections</p>
<p>University Libraries</p>	<p>Public Service Manual</p>
<p>Table of Contents</p>	<p>Chapter VII</p>
<p>Introduction</p>	<p>Statistics</p>
<ul style="list-style-type: none"> • Mission Statements • Special Collections Organizational Overview • Access Policy • Purpose of Public Service Manual • Training 	<p>Purpose</p> <p>Accounting for Special Collections patrons via statistic collection is a long-standing practice in the department. Originally each unit was responsible for their own statistical collection, but when the 3 units moved into one common space, the statistics were gathered by one person, and subsequently entered on the Excel spreadsheet (W drive, Luann's files, Special Collections, Statistics 2003-2004.xls). Following are the different statistics collected and where they are entered in the spread sheet:</p>
<p>Library Users</p> <ul style="list-style-type: none"> • Who do we serve? • Specific User Groups 	<p>Exit Count:</p> <p>ONLY taken at the front desk (using half sheet provided at desk); includes tours of the exhibit room, Special Collections classes held in the Mann Room, browsers, and people asking questions at our front desk (but not counting people getting locker keys to use materials in the Reference area – they will be counted via the registration form).</p>
<p>General Guidelines for Desk Service</p> <ul style="list-style-type: none"> • Scheduling • Opening and Closing Procedures • Reception Desk Duties • Desk Etiquette • Registration of Users • Conducting a Reference Interview • Question Types • Reference Resources • Retrieval Procedures • Circulation Procedures • Restrictions • Handling Collections • Re-Shelving Procedures • Subject Specialist Referrals • Reference via Mail, Email and Phone 	<p>At the beginning of each new week, the previous week's count is totaled and added to the spreadsheet in the Exit Count column.</p> <p>People, Items and Evening Shift Counts: (all taken from our Registration forms)</p> <p>Three different counts are taken from each registration form after the forms are divided by unit. If there happens to be multiple units involved with one patron, a copy of the registration form is added to their count.</p> <p>At the beginning of each new week, the previous week's count is totaled and added to the spreadsheet in the appropriate column under each respective units name</p> <p>Count one: Number of people using collections.</p> <p>If there are multiple days or patrons each one counts!</p> <p>At the beginning of each new week, the previous week's count is totaled and added to the spreadsheet in the People column under each respective units name</p> <p>Count two: Item count for each unit.</p> <p>If a patron is here for 5 days, everything listed on their registration form should be x 5 (or x 10 if two patrons are working on the same materials)</p> <p>At the beginning of each new week, the previous week's count is totaled and added to the spreadsheet in the Items column under each respective units name</p> <p>Count three: Evening hours count.</p> <p>If a patron is here beyond 5, or arrives any time between 5-6:30, a separate count is kept at the top left of their registration form. On the spreadsheet, if a person is here from 5-6:30 they are counted for each time slot for a total of three. 5:30-6:30 is counted twice, 6-6:30 once. This is done to indicate there was a person (not necessarily a different person) in each of our new time slots.</p> <p>The people here for the 5-6:30 slots are not added into the people total for the individual units because they're already reflected by the first count taken using the registration forms.</p> <p>At the beginning of each new week, the previous week's count is totaled and added to the spreadsheet in the 3 columns labeled 5-5:30, 5:30-6 & 6-6:30. These are not unit specific.</p>
<p>Special Requests</p> <ul style="list-style-type: none"> • Loan Requests • Materials on Hold • Duplication Requests • Annex Requests 	<p>Once a month, preferably on the first day of a new month, statistics are entered in the libraries ARL Statistics Site</p> <p>Any staff member can enter statistics on this site using their user I.D. and password that they would normally use to access email. Once there, you choose from a series of drop-down boxes:</p>
<p>Security</p> <ul style="list-style-type: none"> • Check in Procedures • Check out Procedures • Monitoring Use • Permissible Belongings • RADS and Guest Passes • Patron Challenges • Emergencies 	<p>To Update, Review or Enter statistics please:</p> <ol style="list-style-type: none"> 1. Select the fiscal year and month from the dropdown lists below and enter your User ID (e.g., your lias e-mail initials). 2. Select your location from either the UP locations or CCL locations dropdown lists. 3. Click on the appropriate Submit button (UP Submit for UP locations, CCL Submit for CCL
<p>Maintaining Equipment and Supplies</p> <ul style="list-style-type: none"> • Equipment • Reference Room Supplies 	
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<p>Outreach</p>	

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Locations).

If data has been entered for the month, fiscal year and location that you selected you will be given an update form from which you can verify or change data. If no data exists for the month, fiscal year and location that you selected you'll be given a blank form from which you can enter data.

Fiscal Year:
 Month:
 User ID:
 Select UP Location:
 Or ...
 Select CCL Location:
 Export Statistics Reports

Contacts for help with your statistics: Torsten Bjalme, Kimlyn Patishnock
 Report problems with the web pages to: Linda Klimczyk

Example:

Using November 2004, there were 780 uncatalogued items counted for Special Collections during that month. 780 represents ALL collections or items from all 3 units that were used during the month – whether we used workflows or not.

Update Statistics for: Special Collections November, 2004/2005

Please enter only numeric data (numbers, decimal point, comma, dollar sign) in the fields below. Do Not enter alpha characters.

Initial values for blank fields are pre-set to 0. To enter data, type over the 0. Accept the 0 when you have no data to enter.

To see instructions for the categories below, hold your mouse over the bullet next to the category.

Exit without updating Stats

- _____
- Circulation
- _____
- Uncataloged Items
- Monthly
- _____
- Reserves
- Monthly
- _____
- In House Use
- Biannually when notified
- _____
- Collections
- _____
- Serials Received but not Purchased
- Monthly
- _____
- Film/Video
- Monthly
- _____
- Patron Exit Count
- Biannually when notified
- _____
- Reference Transactions
- In-House / Telephone
- Biannually when notified
- _____
- Reference Transactions
- E-Mail / Web
- Biannually when notified
- _____
- Service Points
- _____
- Number of Staffed Service Points
- Annually in June
- _____
- Instruction
- _____
- Course-related/Integrated Instruction Sections
- Once per semester
- _____
- Number of Students in Course-related/Integrated Instruction Sections
- Once per semester
- _____
- Tours, Outreach & Seminars
- Once per semester
- _____
- Number of Attendees in Tours, Outreach & Seminars
- Once per semester
- _____
- Credit Courses and Multi-session Classes
- Once per semester

Number enrolled Credit Courses and Multi-session Classes
Once per semester

Wage Hours Worked by Student, Professional & Support Staff

Hours Worked by Student
Monthly

Hours Worked by Professional
Monthly

Hours Worked by Support Staff
Monthly

Contributed Services Staff
Monthly

Dollars for Professional
Monthly

Dollars Paid by Federal Funding
to Work Study Students
Monthly

Jump to Submit Button _____
Interlibrary Loan
Non-PSU Activity (Definitions) (What not to count) (What to Count)

Loans Provided/Supplied
PA Academic
Monthly
PA Other
Monthly
PA Public
Monthly
PA School
Monthly
Non-PA
Monthly

Photocopies Provided/Supplied
PA Academic
Monthly
PA Other
Monthly
PA Public
Monthly
PA School
Monthly
Non-PA
Monthly

Loans Received
PA Academic
Monthly
PA Other
Monthly
PA Public
Monthly
PA School
Monthly
Non-PA
Monthly

Photocopies Received
PA Academic
Monthly
PA Other
Monthly
PA Public
Monthly
PA School
Monthly
Non-PA
Monthly

Exit without updating Stats Contacts for help with your statistics: Torsten Bjalme,
Kimlyn Patishnock
Report problems with the web pages to: Linda Klimczyk

Twice a year in the Fall and Spring semesters we are asked to collect two different types of data for inclusion in this report to ARL. One week is Reference Statistics and the following week is

Collection Use Statistics. Forms are provided via email for each covered week, copied, and placed at the appropriate desk(s).

What are ARL Statistics?

ARL Statistics is a series of annual publications that describe the collections, expenditures, staffing, and service activities for the member libraries of the Association of Research Libraries. Statistics have been collected and published annually for the members of the Association since 1961-62. Before that, annual statistics for university libraries were collected by James Gerould, first at Minnesota and later at Princeton. These data cover the years 1907-08 through 1961-62 and are now called the Gerould statistics. The whole data series from 1908 to the present represents the oldest and most comprehensive continuing library statistical series in North America. Printed copies are available from the ARL Publications Program.

The Reference Statistics are collected at the front desk and the reference desk, while the Collection Use Statistics are only collected at our reference desk. At the end of the collection periods the statistics are added together and entered into the Library ARL Statistics Site. Reference Statistics are entered under the category Reference Transaction In House/Telephone, and Collection Use Statistics are entered under the category In House Use. Even though we count the number of Troubleshooting, Where is.....and Policy & Service questions, they are NOT entered on the ARL database, but compiled for in-house use by the Public Service Department of the library. Copies of all ARL statistics are kept by the person in Special Collections designated to work with the statistics throughout the year. The registration forms are distributed when the count is taken and returned to the individual units.

Web Statistics via URCHIN

At the present time this particular source of statistics is available to one Special Collections staff member to view using their log-in and a specially created password provided by I-Tech. Urchin records all "hits" or successful requests to our web server from a visitor's browser for any type of file. While the numbers recorded are large, one single web page can cause many hits – one for each image included on the page, etc.

After discussion, I would envision this field being added to our statistics database and recorded on a monthly basis.

Maintaining

Registrations Forms

When all statistical information is taken from the registration forms they are returned to the unit department head.

Automated Circulation

Slips generated through SIRSI are stapled to the registration form, and both are returned to the unit department head

Reporting

As explained in previous paragraphs, reporting of statistics is primarily only done upon request for ARL purposes or for faculty/staff projects.

Instructions, definitions and examples for using the User Query Statistics Form

Instructions

1. The form should be kept at all Reference Desk/Service Point **and** at any other desks where transactions with library users occur, e.g. at a librarian's or other staff desk/work space.
2. Count "transactions": ("An information contact that involves the knowledge, use, recommendations, interpretation, or instruction in the use of one or more information sources by a member of the library staff")
 - a. Place a mark by the code for the appropriate category for the type of question: use the code that indicates the most advanced level of assistance given for each question. Use the appropriate column for how the question was received. If there is no activity during a time period the library is open, put a 0 in the time period. **Remember it is the type of question not the length of time that you spend with the user that determines which code will be used.**
 - b. If the user is referred to another unit, librarian or source outside the Libraries, just put a hash mark in the Referred column. If, however, the referral follows a transaction with the user the appropriate transaction category should be noted also.
 - c. If the user returns to the service point after an absence count that as a new transaction.
 - d. If the question is electronic, it should be counted as one transaction even if it involves several emails. If you monitor a digital reference service, such as QnA Live, QuestionPoint or LibQuest, mark those transactions by the appropriate code in the email column.
3. At the end of the sampling period, please send all forms to Diana Johnson in Library Administration (Box 352900).
4. Questions? Contact Steve Hiller at 3-5071 or [hiller@u](mailto:hiller@u.washington.edu).

Code Definitions and Examples

D- Directional or Logistical

These questions refer to the physical or logistical use of the facility, including directions, as well as library procedures. These questions are answered without the consultation of a reference resource: (you might consult the schedule of hours or the campus map).

Examples:

- How late are you open?
- Where is Microforms/Newspapers?
- Can you put paper in the copy machine?
- Where can I get change for the copiers?
- Where is this call number located?
- How long can I check this book out?
- How/where can I buy a copy card?
- How do I use the networked printer or copy machine?
- Where do I pay a fine for overdue books?

T-Tool/Source based

These questions require the use or demonstration of a reference tool or resource (such as the library catalog), but **not** the formulation of a research strategy. These are questions that deal with facts, known items, or a simple demonstration of reference tools. Many "quick information" or verification questions would fall in this category.

Examples:

- I have some books overdue, how can I renew them from home?
- Can you help me find these journal titles?
- How do I find something by this author?
- I'm looking for this book, which is supposed to be on the shelf, but I can't find it there.
- I found an article in a database; can you show me how to find it in the catalog?
- How do I access the UW databases from off-campus?
- Do you know the annual federal deficit of the U.S.?
- What call numbers cover meteorology and climatology?
- Where is the latest issue of *Geomorphology*?

R -Research Based

These questions often require the librarian or other professional to help the user formulate an individualized search strategy,

Examples:

- Can you help me find furniture from the 1920s in the U.S.?
- I need reviews of the Fantastiks when it first opened.
- How do I find books or articles about mentoring high school students?
- I want to find information about mosses in the Pacific Northwest.

C-Consultation

This category includes in-depth work with the patron usually, but not always, occurring away from a service point. They may be scheduled or impromptu, and are not related to inquiries about a patron's library record.

USER QUERY STATISTICS FORM

March 18-24, 2006

UNIT/SERVICE POINT _____

DATE _____

Instructions:

During the survey period, for all reference/information questions received:

- a. Place a hash mark by the appropriate code for the type of question; use the code that indicates the most advanced level of assistance given for each question. Mark in the appropriate column for how the question was received.
- b. If referred to another unit, librarian or somewhere else just put a hash mark in the Referred column.
- c. **Service points should use a separate sheet for each day; individuals at their desks can use one sheet for the week**

Codes: (see Instructions, Definitions and Examples sheet)

D- Directional/Logistical (Hours, restrooms, library locations, library procedures, copy machines, offices etc.)

T-Tool/Source based (Use or demonstration of a library tool or reference resource but not formulation of a search strategy)

R -Research Based (Individualized strategy requiring selection of relevant resources or instruction in use)

C-Consultation (In-depth work with the patron usually occurring away from a service point)

TIME	In-Person	Phone	Email/Web Chat	Referred
7:30-10	D-- T-- R-- C--	D-- T-- R-- C--	D-- T-- R-- C--	
10-12	D-- T-- R-- C--	D-- T-- R-- C-	D-- T-- R-- C-	
12-2	D-- T-- R-- C--	D-- T-- R-- C-	D-- T-- R-- C-	
2-4	D-- T-- R-- C--	D-- T-- R-- C-	D-- T-- R-- C-	
4-6	D-- T-- R-- C--	D-- T-- R-- C-	D-- T-- R-- C-	
6-8	D-- T-- R-- C--	D-- T-- R-- C--	D-- T-- R-- C--	
8-12	D-- T-- R-- C--	D-- T-- R-- C--	D-- T-- R-- C--	