

Follow-up to SOPAG Statistics Task Force Report – Joanne Miller (SLP), Susan Parker (UCLA), Kevin Ruminson (UCI), Lorelei Tanji (UCI)

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In the Nov. 8, 2008 SOPAG Statistics Task Force Report, the members of the Task Force made five recommendations for next steps and changes to the annual statistics reporting process:

1. Make changes to data collection and add new measures to the published report
2. Keep the current timeline for UC Library Statistics data collection (do not align with the ARL's deadline)
3. Clarify definitions for terms like e-books and electronic reference sources
4. Address the problems with counting serial titles by monitoring the best practices of ARL and determining a standard way for the UC Libraries to de-dupe their serials titles
5. Improve data display/reporting

The Task Force recommended that Systemwide Library Planning (SLP) submit a proposal for changes to the ULs in time for their March 2008 meeting.

Proposal for Changes

1. Data collection changes and new measures

In the November 8 report, the SOPAG Statistics Task Force recommended that SLP take into account the survey responses about problems in collecting existing data and suggestions for collecting new data on library services, e-resources, and digital collections and consider what new measures should be included or developed to support the campus needs. The availability of data and the workload and ongoing sustainability implications for gathering and processing them should be taken into account.

SLP will include more data in the UC Library Statistics Report on shared and digital collections in alignment with the ARL annual statistics survey and in light of the new Accountability Framework initiated by President Yudof (<http://www.universityofcalifornia.edu/accountability/>). The data is already collected from the campuses on Schedule F (beginning in 2006-07), but has not been reported

due to inconsistencies among campuses and numerous gaps in the data. SLP will work with the campuses to improve reporting of shared and digital collections.

It should be noted that the responsibility for producing the library budget data (Tables V and VI) for the Governor's Budget has been relocated to the UCOP Budget Office. SLP will continue to work with the Budget Office to provide the data currently available in the Statistics Report, but the format may become more consolidated. In the Task Force survey, only four out of the 10 campuses claimed to use the budget tables.

2. Clarify definitions for terms like e-books and electronic reference sources

SLP will continue to monitor ARL definitions and work with campuses for a better understanding of the definitions and how these resources should be counted.

3. Address the problems with counting serial titles by monitoring the best practices of ARL and coming up with a standard way for the UC Libraries to de-dupe their serials titles

SOPAG asked Martha Hruska (UCSD), Chuck Eckman (UCB), and Tony Harvell (UCSD) to advise on best practices for counting serial titles. Martha and Chuck are members of the ARL Ad Hoc Task Force on Best Practices for Counting Serial Titles, which is charged with reviewing the newly implemented instructions for serial title counting practices by ARL member libraries and to identify best practices that can be applied to simplify the process. Tony Harvell currently provides the title count for shared electronic journals cataloged by UC's Shared Cataloging Program. Tony suggested using the SFX KB Tools – available at all campuses – to obtain serial title counts (see attached proposal), and ran a few tests in collaboration with Margery Tibbetts (CDL). We recommend adoption of Tony's methods for the UC libraries/CDL, along with a "FAQ" for campuses, and that SLP and campus libraries continue to monitor the best practices of ARL for counting serials. Martha, Chuck, and Tony will finalize their recommendations by the end of March, 2009 and campuses will have an opportunity to review and comment before implementation.

4. Improve the presentation of the data to more clearly show the library resources available to each campus and Systemwide.

Because serials are now reported as de-duplicated titles and not subscriptions, it makes no sense to provide a UC "total" for serial titles. In response to the changed definition for counting, SLP will create separate tables for volumes and for serial titles, and will report *all* serial titles (systemwide and locally-licensed) to which the campuses provide

access. The number of serial titles licensed on a system-wide basis will be included along with the campus totals. SLP will continue to work on improvements in the presentation of all data in the annual report.

Next Steps: Analysis and Evaluation

During the November UL/SOPAG discussion of the Task Force Report, some of the attendees expressed the desire for more analysis of the data provided in the UC Libraries Statistics Report. The ULs and SOPAG members suggested it would be helpful in “telling the story” of the UC Libraries. This may require additional discussion by the University Librarians or SOPAG, and perhaps the convening of a special task force or sub-committee to evaluate what type of information is desired, what kind of reports library constituents would find most useful (e.g., how much data, how much analysis, what “story” should be told), and the frequency/regularity of the reports. While reports on the state of affairs of the UC Libraries can be found elsewhere (e.g., the Regents’ Budget), SLP will work on providing some basic analysis of the data, including timeline data, in conjunction with the publication of the Systemwide Statistics Report.

Review of Plan and Timetable

November to March 18: Joanne Miller (SLP) takes into consideration the results of the survey and drafts some recommendations for changes in the collection of library systemwide statistics in time for the UL/SOPAG March 26, 2009 meeting.

March 26 - May 29: Campus libraries review proposed changes and submit comments to SLP.

June 1 - 30: SLP finalizes new methods or formats for collecting statistics.

July 2009 - June 2010: Campus libraries collect statistics in the new formats (if any are necessary) for reporting to UCOP in the summer and fall of 2010.