

UC Libraries Annual Statistics Project Team

Purpose

The UC Libraries Annual Statistics Project Team is charged to provide ongoing support for the UC Libraries' centralized annual statistics work, including preparing campus and CDL data for reporting, identifying opportunities to further harmonize reporting approaches and generating statistics for priority reporting obligations going forward.

The work of this Project Team is based upon the foundation provided by the Alma Annual Statistics Analytics Project Team, which did a significant amount of early optimization to improve the quality of data reports and reduce the associated campus workloads. The UC Libraries Annual Statistics Project Team is required to support ongoing operations of this work to maintain efficiencies, ensure the continued validity of centralized reporting and integrate centralized and local statistics for shared reporting obligations.

Centralized statistics are generated on July 1 of each year by CDL in consultation with each campus and based on existing UC Libraries agreements and consensus. To support this timeline, the UC Libraries Annual Statistics Project Team will engage campuses starting in mid-May to prepare their data for reporting.¹ If a campus is unable to identify a representative to the proposed UC Libraries Annual Statistics Project Team by mid-May, the campus AASA-PT representative will temporarily serve as campus liaison to ensure business continuity until a new representative is identified.

Reporting Line

The UC Libraries Annual Statistics Project Team reports to DOC.

The UC Libraries annual statistics contribute to reporting obligations that engage members of each campus library leadership team, including the university librarian. DOC's position within UCLAS, and DOC members' positions within their local campuses, create connections to library leadership, domain experts and UCLAS groups whose work intersects with or impacts the annual statistics and which may be consulted in support of the annual statistics work. Should a reporting obligation change or an opportunity to further harmonize arise, DOC is the appropriate body to advise and facilitate access, as needed.

¹ Campuses are asked to provide information on how to categorize any new values found in campus data (e.g., new locations or user groups that did not appear in the previous year and have an opportunity to re update categorization decisions from previous years and affirm other campus-specific criteria for final stats reporting

Scope of Work

The UC Libraries Annual Statistics Project Team will be responsible for managing the UC Libraries' centralized annual statistics service and delivering the following centrally-compiled statistics to campuses each year:

- UC Libraries / UC Office of the President (UCL/UCOP) annual statistics report
- ACRL questions 40 (books), 41 (media), 43 (serials) and 60 (circulation)
- ARL questions 1 (titles), 2 (volumes), 4 (electronic book volumes) and 17 (circulation)
- Risk Management

Responsibilities & Anticipated Time Commitment

The UC Libraries Annual Statistics Project Team will

- manage the Alma Network Zone Analytics reports used to prepare and generate the aforementioned campus collection and usage data annually and gather non-ILS data submissions from each campus, and will be responsible for combining these data sources to produce the final statistics for each reporting obligation
- consult with campus and CDL domain experts as needed to ensure shared Alma NZ Analytics infrastructure reflects systemwide and campus needs for annual statistics reporting
- maintain documentation to support the ongoing success of the centralized statistics service
- deliver initial and final statistics to campuses on established timelines to support local reporting obligations

The UC Libraries Annual Statistics Project Team is expected to be active from May through October of each year; between statistics cycles, the team is expected to be dormant. During the active period the team will meet on an as-needed basis, to review deliverables as they are finalized and when matters arise that cannot be managed over email. Team members will be expected to spend upwards of 4-8 hours of work per month outside of meetings during the active period of the year; during the dormant period team members may be asked to provide input on potential changes (e.g., if reporting agencies update their instructions in a way that impacts shared approaches to statistics reporting, or if the team needs to rescope its deliverables to respond to campus, DOC or other UCLAS requests).

Membership

Membership should include technical experts in Alma Analytics as well as expertise in each major reporting area (electronic collections, physical collections and physical collections usage); CDL will provide team management and will be responsible for coordinating activities and maintaining shared infrastructure (i.e., Alma Analytics reports, documentation) in support of the centralized annual statistics service.

Campus team representatives

Each campus will assign one representative, appointed by their DOC representative, to the UC Libraries Annual Statistics Project Team. Each campus representative will

- provide input and technical feedback to the CDL technical team on Alma Analytics reports and team documentation, as needed
- review and affirm work products and deliverables (design, instructions and outputs)
- liaise with campus domain experts to ensure report criteria and outputs remain in alignment with campus reporting expectations (e.g., by ensuring data is categorized correctly for annual statistics reporting purposes, by affirming statistics outputs are 'good enough' for use in local reporting)

CDL team manager

The CDL systemwide library planning senior analyst will provide project and service management for the UC Libraries Annual Statistics Project Team. The team manager will

- coordinate UC Libraries Annual Statistics Project Team work and provide administrative support to ensure timely delivery of annual outputs
- oversee the CDL technical team maintaining Alma Analytics objects and supporting team/campus documentation
- serve as the central point of contact for the annual statistics service
- liaise with systemwide domain experts as needed on matters related to reporting criteria (CDL-managed eResources, SLF deposits) and technical infrastructure (Alma NZ Analytics)
- liaise with DOC as needed as the service, including supporting technologies and campus needs, evolves

CDL technical team

The CDL Information Services analysts will provide basic technical support to the UC Libraries Annual Statistics Project Team. The CDL technical team will

- maintain Alma NZ Analytics infrastructure for centralized annual statistics reporting, updating as needed to reflect evolving campus criteria and reporting guidelines
- maintain annual statistics service documentation, updating as needed to reflect current campus criteria, reporting definitions and wayfinding to support external users engaging with the reports
- generate campus and systemwide data at set points during the year; package data for reporting to UC Libraries Annual Statistics Project Team and campus colleagues
- coordinate the non-ILS data submission process
- prepare final statistics for each reporting obligation
- as needed, prepare lightweight year-over-year comparison analyses of key high-level statistics, to support campus review of deliverables

In preparation for the FY 2025-26 statistics reporting period, the CDL technical team will additionally work to adapt existing Alma NZ Analytics reports to a more streamlined, lightweight approach that should result in faster, more explainable reports that are easier to adapt for reuse in future years. This work will require additional time, which CDL commits to providing. In future years, the time commitment from the CDL technical team is expected to be lower.

Authority

Based on the [consensus and agreements established through AASA-PT](#), which received DOC and CoUL endorsement, the team has authority to make decisions on how UC Libraries data are reported for annual statistics, for individual campuses and systemwide, in consultation with campus and systemwide experts. As needed, the UC Libraries Annual Statistics Project Team may engage (through DOC) other systemwide or expert groups in harmonization efforts and interpreting or updating reporting instructions.

Communication

The UC Libraries Annual Statistics Project Team will

- provide regular updates to DOC on its work, in the form of a brief written update at the end of each annual statistics cycle
- inform DOC when a campus needs a new representative to be appointed
- alert DOC of any significant changes that impact the team's scope of work or ability to deliver annual products to campuses

Specific communications workflows and processes will be defined in collaboration with DOC.

Additionally, the UC Libraries Annual Statistics Project Team will maintain regular communications with campuses throughout the statistics reporting period via team members and established channels with campus statistics contacts.

CDL will post the final UCL/UCOP annual reports to the UC Libraries website in a timely manner each year, and will liaise with the UCOP Budget Analysis and Planning and Risk Management offices to submit required statistics.

Additional Considerations

The UC Libraries' annual statistics reporting will continue to prioritize harmonization where possible. At times, the team may identify harmonization opportunities that require action by another group (e.g., a recommendation to harmonize a cataloging practice to support more consistent annual statistics reporting would require consultation with and action by the SILS Resource Management Operations Subteam). The UC Libraries Annual Statistics Project Team manager will consult with DOC as needs and opportunities arise to identify pathways for advancing these requests.

Out of Scope

This UC Libraries Annual Statistics Project Team's work is scoped to support production of UC Libraries' existing annual statistics obligations for reporting to UCOP (in the UCL/UCOP report and for Risk Management), ACRL and ARL. This group is not staffed to take on additional analysis or statistics projects at this time. If systemwide annual statistics reporting needs change in the future, the UC Libraries Annual Statistics Project Team will consult with DOC to assess priorities for deploying limited systemwide resources.

Charge Review

The UC Libraries Annual Statistics Project Team charge and scope of work will be reviewed and updated (as needed) at the conclusion of the FY 2025-26 annual statistics reporting cycle. Thereafter, the charge and scope of work will be reviewed every 3 years by the service team and in consultation with the DOC liaison, or sooner upon request.