

University of South Florida

From the Selected Works of Barbara Lewis

Fall October 30, 2012

Data-Driven Decision Making: A Holistic Approach to Assessment in Special Collections Repositories

Melanie Griffin, *University of South Florida*

Barbara Lewis, *University of South Florida*

Mark I Greenberg, *University of South Florida*



Available at: <https://works.bepress.com/blewis/21/>

Data-Driven Decision Making: A Holistic Approach to Assessment in Special Collections Repositories

Abstract

Faced with shrinking budgets and reduced staffing, the University of South Florida Libraries Special & Digital Collections Department (SDC) implemented a comprehensive, integrated assessment program to better focus its diminished resources within clear strategic goals. Department faculty sought to answer the following inter-related questions: 1) What are the Department's staffing needs? 2) What staff skill sets and training are required to meet researchers' expectations, and what personnel skills and functions are most needed by the Department in the future? 3) Where should the Department target its outreach efforts? 4) How can the Department streamline and prioritize technical services to support patron needs? 5) How can collection development and intellectual access activities best align with strategic goals and patron needs?

This paper presents the results of integrated qualitative and quantitative assessment activities, which, when taken as a whole, provided SDC with a comprehensive view of patron and Department needs. The assessment strategies utilized in SDC allowed for a wide variety of improvements and changes in staffing practices, all driven by data rather than anecdotal evidence.

Introduction

Like many academic libraries, the University of South Florida Tampa Library reports all manner of statistics but has not come effortlessly to assessment.¹ Over the last decade,

it has participated several times in LibQual. Librarians involved in instruction use a variety of assessment tools, such as pre- and post-tests, but as of yet there is no Library-wide assessment program such as Standardized Assessment of Information Literacy Skills (Project SAILS).² A greater emphasis on accountability in higher education, sobering fiscal realities at USF, and considerable attention over the last decade paid to library assessment activities have driven the USF Tampa Library to action.

In late 2009, the USF provost convened a campus-wide Student Success Task Force to recommend a fundamental transformation to the student experience. In its 160-page report, the task force made three recommendations: institutionalize student success as a permanent USF priority, integrate student success into USF's institutional culture, and build the research capacity to support student success initiatives.³ In 2010, the university formed the Office of Student Success (OSS). For the last three years, OSS has engaged nearly every unit at USF in order to enhance academic progress and student satisfaction, improve graduation and graduate school admission rates, and increase student competitiveness in the marketplace. The Library quickly became central to OSS goals. Library administrators extended hours of operation to 24/5 and welcomed Tutoring and Learning Services, a student employment center, and the Office of Undergraduate Research into the Library.⁴

The emphasis on accountability for improved student success coincided with deep cuts to higher education in Florida. USF's appropriation from the state legislature fell from nearly \$371.91 million in 2007-2008 to \$305.25 million in 2011-2012.⁵ In the Tampa Library, the number of professional and non-professional staff declined from 94.1 FTE in 2007-2008 to 73.5 FTE in 2010-2011, and in May 2011 the Graduate Assistant program in cooperation with the School for Library and Information Science was discontinued. The

loss of six part-time graduate students placed a particular strain on public services activities throughout the Tampa Library, including the Special Collections reading room. Compounding loss of staff between 2007 and 2011, total Library expenditures decreased from \$11.86 million to \$10.91 million while print and electronic resources costs at USF increased an average 4.2 percent annually.⁶

The rising importance of assessment within the library profession, as evidenced by attention to the topic in professional literature, also motivated the USF Tampa Library to take assessment more seriously. A brief survey of publications on assessment revealed 236 peer-reviewed articles between 1990-1999 and 676 peer-reviewed articles the following decade. From January 2010-August 2012, alone, 376 articles appeared in publication.⁷

Within an environment of rising expectations, decreasing resources, and the profession's growing interest in assessment, the Tampa Library formally revisited strategic goals set in 2008 in order to adapt them to the dramatically shifting terrain. Following a lengthy process that involved the entire staff, a written report in May 2011 "reset" the strategic direction begun three years earlier. The report confirmed Special & Digital Collections' (SDC) significant role in cultivating a research culture within the Library. Specifically, SDC was asked to redouble its efforts to build several collections of national distinction (albeit with fewer resources), develop and refine research tools and services to support these collections, and expand its outreach. Library investment of staff time and financial resources prioritized strategic projects.⁸

SDC staff quickly realized it could not meet its obligations under the Library's strategic plan nor continue to improve public services and collections in an environment of diminishing human and financial resources without greater attention paid to assessment.

Department librarians and staff also understood that the questions it sought to answer, though focused primarily on public services, were interrelated and thus required an approach that addressed a variety of activities in a comprehensive and integrated manner. Specifically, SDC's assessment plan asked the following: 1) What are the Department's staffing needs? 2) What staff skill sets and training are required to meet researchers' expectations, and what personnel skills and functions are most needed by the Department in the future? 3) Where should the Department target its outreach efforts? 4) How can the Department streamline and prioritize technical services to support patron needs? 5) How can collection development and intellectual access activities best align with strategic goals and patron needs?

The professional literature includes a rapidly growing number of publications on assessment for academic libraries in general, but discussions of assessment methodologies for special collections and archives tend to be sparse and to focus on answering specific questions, usually related to technical services.⁹ Common types of assessment studies in special collections literature include methodologies for computing the time¹⁰ or money¹¹ required to process archival materials, reducing the backlog of hidden collections,¹² measuring the impact of special collections cataloging,¹³ and performing condition assessments.¹⁴ While many of these studies, particularly those discussing minimal standards processing, consider access and user implications,¹⁵ very few as yet focus specifically on establishing metrics for defining "good" public services in special collections or archives. The Archival Metrics toolkit is an outlier, providing toolkits for assessing various parts of a special collections or archives department, including public services web tools.¹⁶ More recent literature, particularly the fall 2012 special *RBM* issue on assessment,

focuses on a more varied array of assessment strategies for special collections and archives. The article “Data-driven Management and Interoperable Metrics for Special Collections and Archives User Services,” for example, establishes the framework for an evidence-based practice approach to assessment.¹⁷

Assessment Tools

As SDC was unable to find an existing assessment methodology that considers the entire special collections environment, SDC librarians and staff created a holistic assessment model that takes into account the needs, requirements, and standards of public services, technical services, and administration. This paper presents the results of qualitative and quantitative assessment activities, which, when taken as a whole, provided SDC with a comprehensive view of patron and Department needs. Beginning in May 2010, staff began collecting quantitative data on collection use, reading room activity, and website traffic using circulation and reading room statistics, reader registration profiles, and web analytics. To accomplish the necessary quantitative data collection, the Department utilized a variety of systems, including Aeon, Desk Tracker, Google Analytics, LibGuides, and Fedora Commons Repository Software, which provide staff with statistical information. Patron surveys and usability testing,¹⁸ conducted over academic year 2010-2011, provided qualitative information on the patron experience in the reading room and using the Department’s web tools.

Aeon

Aeon, a product of Atlas Systems, Inc., is a material request and workflow

management software specifically designed for special collections libraries and archives. The data collected in Aeon provides staff with detailed patron information as well as reading room and material usage statistics. Patron data includes status (undergraduate, graduate, faculty, staff, community user, visiting scholar, etc.), discipline (humanities, social sciences, etc.), research interests (optional), and the day, time, and duration of each visit. Material request data includes the type of material (e.g., monograph, archival material, etc.), collection name, day and time a user received and returned materials, the patron's user ID, and standard bibliographic information.

SDC implemented Aeon in May 2010. Through August 2012, 6,313 material transactions and 1,732 reading room visits have been recorded. At the end of each semester, staff generate and analyze a standard set of reports (see appendix 1). The combination of data collected and reported enables SDC staff to identify when the reading room is most active, what type of patrons use the reading room and when, and what collections are used and by whom. Aeon also tracks which staff members are involved in each step of each transaction. Analysis of this data provides insight into staff members' proficiency in their use of Aeon and identifies potential training needs.

Desk Tracker

Aeon offers valuable data on reading room and collections use, but the software is not designed to record all patron contact. SDC librarian and staff interaction with patrons takes many forms, including face-to-face communication, email, letter, fax, and telephone calls, and serves a variety of purposes, including research consultations, program planning, collection development, and donor relations. In order to better assess the use of librarian

time and the knowledge required by reading room staff, SDC needed a system to capture data on all types of patron interactions.

Desk Tracker is a web-based library statistics system offered by Compendium Library Services LLC. The program enables library staff to record general patron transaction activities, generate reports via a standardized reporting process, and customize Desk Tracker windows to capture both individual and public service point information. The customization features make it possible for staff at each service location to collect unique data, but also to standardize across service points how patron transaction information is recorded and tracked and the type and level of data that is collected.

SDC began using Desk Tracker in September 2010. As with Aeon, staff members record user type. In addition, they also note the purpose of the visit, the specific request(s) made and/or question(s) asked, and the outcome of the interaction (see appendix 2). In the case of material requests, the interaction is noted in Desk Tracker, but all details of the request appear in Aeon.

Reading Room Patron Survey

Rather than developing an independent instrument to measure patron satisfaction in the reading room, during the spring 2011 semester SDC adapted existing instruments created by the Archival Metrics project. SDC modified its instrument to be as short, simple, and as meaningful to the institutional context as possible. All patrons who request materials in the reading room are asked to fill out a paper survey, which is provided to them with their requested materials. A staff member then enters survey data into a SurveyMonkey form to facilitate data analysis. While ideal circumstances would require

each patron to complete the questionnaire in a web-based form during each visit, some patrons decline to receive or complete the survey, and the physical layout and limited computer availability in USF's reading room preclude a web-based option.

The 1-page, 1-minute survey (see appendix 3) asks users to rate their satisfaction in the reading room in six concrete, easily measured areas: the helpfulness of staff, time spent waiting for materials, hours of operation, noise levels, website functionality, and photocopying / duplication services. Two additional questions ask patrons to rate their overall experience and their progress towards meeting research goals for the visit. The survey collects limited demographic information about the patron: status (undergraduate student, graduate student, faculty member, visiting scholar, community user) and the purpose of his/her visit to Special Collections (class assignment, dissertation or thesis, publication, family history, etc.). The survey ends with an open-ended comment field, asking for ways in which the reading room experience could be improved.

Website and Digital Collections Usability Study

Based on lackluster response rates to web-based usability testing at the USF Library, during the spring 2011 semester SDC opted to conduct face-to-face website usability testing with a small sampling (n=10) of representative user types: undergraduate students, graduate students, and faculty members. Unfortunately, no community users were available or willing to participate, resulting in a small but significant gap in the population sampled. This usability testing focused on two of SDC's web tools: its main website and its digital collections user interface (CORAL).

The only demographics captured during usability testing were user status and

preferred browser. During the test, SDC staff asked participants to find information on the Department's website and to perform a series of tasks using CORAL (see appendix 4). A staff member observed the user during the test, created screen captures, recorded any verbal questions or comments, but did not provide help. After completing the series of tasks, staff asked each user a series of open-ended questions.

Web Analytics

SDC uses a variety of content management systems to organize its web presence, including WordPress, LibGuides, and Omeka. The Department utilizes Google Analytics to track total and unique page views, bounce rates, exit rates, average time on pages for all WordPress and Omeka web pages, as well as the browser and operating systems used to access these websites (see appendix 5). In addition to its main website content, SDC also maintains a number of LibGuide-based subject pages, and the Department uses the software's built-in statistics tools to track individual page and guide views, device type, browser, and operating system (see appendix 6).

Fedora Commons

SDC currently utilizes an internally developed digital asset management system built using the Fedora Commons Repository Software to store and access its own text, image, and audio/video digital content. Searches, hits, views, and downloads are recorded in the database so that regular and ad hoc reports can be generated to identify digital collection and item usage. Reports also detail the number of items in each collection and the size in MBs for each item and collection.

Assessment Outcomes

After implementing all of the tools outlined above and initiating data collection, SDC librarians and staff analyzed the results of each process separately and as part of a long-term assessment strategy to inform changes in departmental practices. Staff focused particularly on analyzing intersecting data points from multiple tools and devoted its time to improving services, rather than highlighting a list of problems that, for a variety of institutional or budgetary reasons, could not be fixed. With eighteen months of ongoing, integrated data collection complete, the assessment outcomes described below have offered an excellent starting point for data-driven decision making. Over time, the Department plans to refine its continuous assessment strategies, learn more from data collected, and improve its operations accordingly.

Staffing Needs

Prior to 2009, two Department employees, often at least one librarian, staffed the public services desk in the reading room during all hours of operation (Monday - Friday, 9 am – 6 pm). The Department's "just in case" model ensured that someone capable of answering any type of reference question would always be available, just in case they were needed. Crippling budget and staffing cuts necessitated changes. A single staff member, often a temporary student employee, began working solo shifts at the public service desk during reduced hours (Monday – Friday, 10 am – 5 pm), paging materials, answering basic reference questions when possible, and providing a librarian's phone number or email address when greater knowledge or a reference consultation was needed.

Librarians and administration worried about the implications of the new reading

room model on quality service. Department staff used several of the tools described above to assess the impact of these service changes on patron satisfaction and, most importantly, prioritized data rather than anecdotal evidence in its discussions.

First, the reading room survey provided simple quantitative data on factors such as patrons' satisfaction with hours of operation and wait time, as well as qualitative information on their experience in the reading room. Staff discovered that their perceptions of inadequate staffing levels and excessive wait times were exaggerated. During the first eighteen months of data collection, only one of the 178 respondents expressed dissatisfaction with the service provided in the reading room. Patrons were not shy in expressing concerns about other matters, particularly SDC's inadequate photo duplication services, limited hours of operation, and sometimes confusing website. Staff worried about collections expertise and research consultations "on demand" in the reading room, but patrons' survey responses revealed that they did not mind receiving a librarian's email address or phone number in lieu of an immediate answer. In fact, instead of the anticipated complaints, users routinely offered compliments about staff knowledge, availability, and helpfulness. Sample responses to the question "what can we do to make improve your experience in the Special Collections reading room" include: "Nothing! :)" and "Nothing; clone your staff & send them downstairs to first floor reference desk. Attitudes are SO helpful up here!" Constructive criticism comments included "Extended evening hours," "At work & class from 9 am to 5 pm daily. I have trouble getting to S.C. during the open hours," and "Make copier accessible to reader[s]." Based on the collected data, staff decided that major changes to the service model were not needed, but that operational modifications would be beneficial.

Two significant changes occurred due to results from the reading room survey. First, patrons confirmed the inadequacy of photo duplication services. The Department relied on a single flat bed photocopier, inaccessible to patrons, and staff denied many copy orders either on account of materials' size or fragility. Staff offered use of an inexpensive digital camera, but it was not a popular solution, as lighting levels and limited camera functionality frequently resulted in blurry images, especially of textual materials. Staff believed that an overhead scanner with a book cradle provided a better solution, but the cost seemed prohibitive given the Library's declining operating budget. Using the qualitative and quantitative data generated by the patron survey, SDC partnered with the Academic Services unit at the Tampa Library to write a successful student technology fee grant to install three overhead scanners in the building, including one in the reading room. With the scanner installed, patron complaints about reproduction services have drastically decreased.

Second, in response to the dissatisfaction expressed by users over reading room hours, staff looked for simple ways to modify hours of operation without encumbering additional costs. Using data exported from Aeon, staff analyzed traffic patterns in the reading room. They isolated high demand during lunch and early afternoon and more limited use late in the day. They noted the frequency with which the Department opened to waiting patrons, which ultimately led staff to open the reading room an hour earlier. Current staffing levels preclude evening and weekend hours, despite repeated requests for "different" hours on the reading room survey and in phone calls to the Department, documented in Desk Tracker. The data also confirmed that a second staff member at the public service desk is generally not needed before lunch and at the end of the day, but

additional support is required for three hours in the afternoon Monday through Thursday. Today, the Department's reading room manager, with additional help readily available, covers these hours.

Data derived from Desk Tracker provide granular information on patrons' needs in the reading room. Early afternoon hours tend to be the busiest, but undergraduates with known item retrieval requests constitute a disproportionate number of users during these hours. Visiting researchers, graduate students, and USF faculty, for whom more time consuming transactions usually occur, tend to arrive much earlier in the day, and they often have communicated with a librarian liaison before their visit. For patrons who have called ahead or already completed a research consultation, item retrieval requests tend to be more predictable and thus less time consuming for desk staff.

Training and Supervision

Prior to Aeon's adoption by USF in Spring 2010, Special Collections staff did not uniformly adhere to written procedures regarding information expected on reader registration forms and call slips or the order in which tasks were to be completed at the reading room public service desk. As a result, the Department knew little about some of its patrons for purposes of outreach and security, could not accurately count collection use from illegible or incomplete call slips, and faced unacceptably high numbers of misplaced materials with no way but memory to trace the last staff member to touch an item.

With multiple librarians overseeing the reading room but no single person in charge, effective training and supervision proved difficult. New students or staff working the public service desk struggled to remember and follow policies and procedures, and a

few recalcitrant longtime employees remained wedded to old ways of doing things. Juggling multiple responsibilities, the Department's director and librarians did the best they could to address issues as they occurred, but the collaborative approach to training and supervision proved increasingly ineffective. Amidst other changes underway in public services, Department members decided to fill a line vacated by an administrative assistant with an operations manager to oversee staff and student training and supervision, revise and implement new reading room procedures, coordinate security, collect and analyze statistics, and maintain public services software management systems.

Aeon offers uniform, required workflows that limit the ability to provide or accept incomplete patron registration or materials request information or skip steps in the request, retrieval, and re-shelving of items. Aeon reports provide information on transaction types and about individual staff members' performance with the product, thereby identifying areas in need of additional training. For example, analysis of the data on users signed into and out of the reading room revealed that some staff members were not always diligent about signing patrons out. Remediation and enhanced supervision ensured that staff more accurately recorded reading room traffic data.

Outreach

SDC's website is often the first point of contact between patrons and the Department, and it serves as an essential outreach tool. Phone calls and in-person questions from puzzled or frustrated patrons suggested that SDC's website navigation structure was not always intuitive and its content occasionally incomplete. Early results from the reading room patron survey, which asks users how easily they navigated the

Department's website, confirmed this suspicion. Usability testing with patrons and bounce rates derived from Google Analytics provided concrete information on specific and suspected navigation difficulties, confusing terminology, and technical barriers to accessing information.

When SDC first conducted usability testing on its web pages, the Library used LibGuides as its content management system. This CMS necessitated a tabbed structure, but staff built pages without consistent, hierarchical navigation accessible from every page of the site. Not surprisingly, patrons most often experienced difficulty with basic navigation. Undergraduates, in particular, struggled to find the Special & Digital Collections portion of the Library's main landing page. Once they arrived, however, most users understood the site's terminology and successfully located basic information such as Department hours and a librarian to help with a project on a specific topic.

To make the website a more effective outreach tool, two SDC librarians collaborated with the newly hired Webmaster to improve navigation. In addition, one librarian participated in the Library's website redesign team to ensure that the group considered SDC needs. The technical limitations experienced with LibGuides proved insurmountable, so staff moved considerable amounts of content to WordPress to accommodate a more uniform design and built-in, standardized navigation. As users more often experienced problems with navigation, not content or vocabulary, the Department asked the Webmaster to provide only structural and design support, and it retained control over its content management.

Further usability testing, in conjunction with statistics from Google Analytics, highlighted a known issue in SDC's digital collections user interface (CORAL): 36 percent of

the site's users accessed the collections in Internet Explorer, and those users experienced greater difficulty in performing simple and complex searches. In addition, users requested several enhancements, including Boolean operators, the ability to limit searches by format (text, audio, and/or video), and access to higher resolution downloadable images. They identified visual changes to the interface to make it more intuitive, reduce click-throughs, and permit reproduction of metadata. SDC librarians, administration, and the CORAL developer documented, discussed, and prioritized all user concerns. As with assessment of the reading room, staff focused on issues that could be changed rather than those without a practicable solution. During spring and summer 2012, the developer made programmatic modifications and enhancements to CORAL in order to address these issues.

Data derived from page hits, combined with collection use patterns from CORAL and Aeon, provided insights into additional avenues for outreach. Some of the Department's most heavily used collections correlate with its most frequently used web pages, but some collection pages have extremely high hit rates despite sporadic collection use. Low bounce rates suggest that page visits do not result from false hits, but staff have not been able to discover why, in some instances, webpage usage coincides with collection usage and other times it does not. Librarians are currently experimenting to see if high web hits for collections with lower usage statistics offers an opportunity for targeted outreach and instruction efforts to translate interest into use.

Technical Services and Collection Development

The same budget cuts that necessitated changes to SDC's public services staffing policies also resulted in slower rates for cataloging monographs and serials, processing

archival collections, and acquiring or creating collections. The reading room patron survey, Aeon, Desk Tracker, and CORAL statistics assisted the Department in resetting some of its technical services priorities, making targeted acquisitions, and establishing more strategic digitization priorities.

In terms of stacks maintenance, SDC has thirty-six distinct location codes in USF's catalog for monographic collections and an additional two codes for archival and manuscript collections. Locations are further delineated in a separately maintained stacks guide, which indicates the range and shelf number for each collection. As in many repositories, space is at a premium, and in recent years staff members have spent considerable time shifting collections to accommodate new acquisitions. Now, with data on which collections patrons most heavily use, stacks management decisions are more thoughtful. Infrequently used collections, for example, now reside in quasi-remote storage, freeing space near the reading room for heavily used materials.

Collection use data has also driven decisions about whether to pursue or accept specific donations and to make particular purchases. For example, materials related to the cigar industry and its ethnic communities in Ybor City and West Tampa comprise one of SDC's most heavily used collection areas. As a result, one SDC librarian has devoted additional effort to working with potential donors to assess and, where appropriate, accept donations of manuscripts and monographs. With the Holocaust & Genocide Studies Center's collections receiving growing use by faculty and students, SDC librarians have expanded relationships with targeted rare book and manuscript vendors in the U.S. and abroad to purchase published and unpublished materials. Given increased demand for the subject area by users, these items receive priority cataloging and processing.

Reading room patron surveys, Google Analytics, and Aeon and Desk Tracker statistics now play a greater role in determining digitization priorities. SDC librarians track disproportionate hits to subject pages on the Department web site, the high use of specific collections, and individual digitization requests. Patrons' needs have joined a parallel production track within the digitization lab. Longer-term, internally directed projects designed to grow USF's reputation as a research library occur alongside externally driven, more immediate, smaller scale digital collection building.

Conclusion

During the last eighteen months, Special & Digital Collections has focused considerable energy on developing and implementing a systematic, holistic assessment strategy to improve a range of services in the Department. With data derived from several assessment tools, staff has better aligned reading room hours and staff skill sets with patron needs, utilized limited financial and human resources to build the physical and digital collections demanded by its patrons, and more thoughtfully targeted its outreach efforts.

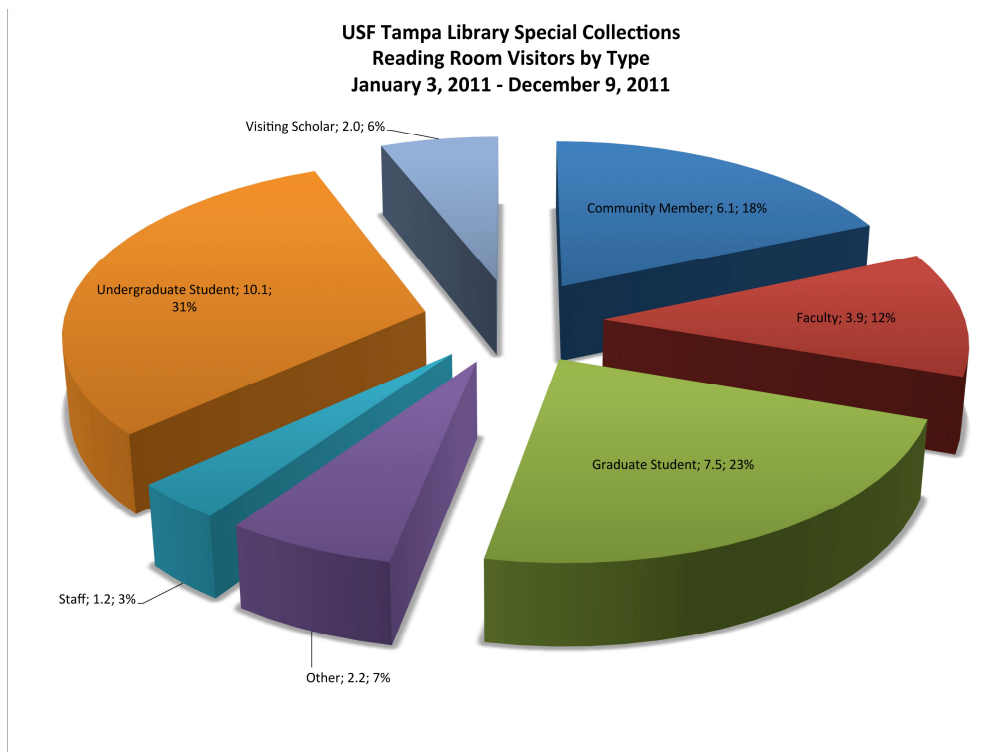
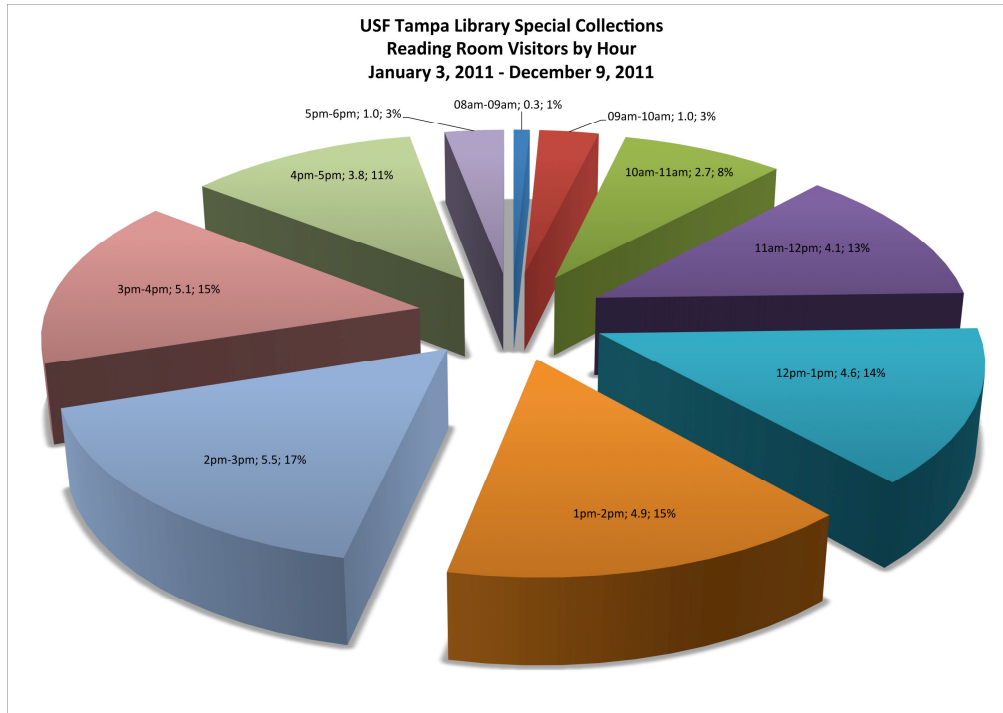
Despite significant improvements to Department operations, SDC's assessment efforts are not complete. Currently, there are no national standards for assessing special collections, and thus SDC's methodologies were highly customized to its institutional environment. USF's work may be extensible to other special collections units, but without standardized metrics it is too early to tell. Further, SDC can track self-improvement from year to year but has no way of comparing itself to peer and aspirant institutions. Once the

work of the RBMS Metrics and Assessment Task Force is complete, SDC plans to ensure that its assessment activities conform to the new standards.

Most SDC assessment activities are continuous, but not all. The Department needs to conduct more frequent usability studies of its several content management systems. Since mid-2012, SDC's digital collections have resided in USF's institutional repository as well as in CORAL. As yet, SDC has not gauged patrons' satisfaction with the repository or determined their preferences between systems. By late 2012, the Department plans to implement new photo duplication processes, and those too will require careful analysis and patron feedback.

SDC's assessment methodology may require future realignment. Its web assessment activities must occur at regular intervals, but despite these areas for improvement, something transformative has occurred over the last eighteen months at USF. Where once SDC librarians and staff aspired to assessment, today the Department has adopted a systemic, holistic strategy that has become part of its working culture. The greatest hurdle to continuous improvement has been overcome.

Appendix 1: Selected Aeon Reports



Appendix 2: Desk Tracker Reading Room Form

Activity **Reports** **Manage**

Submit

Batch Mode | Multiple Entries | Custom Timestamp

Contact Type required [ticksheet]
☐ Face to Face
☐ Phone
☐ Email (other than Ask a Librarian)
☐ Chat (other than Ask a Librarian)
☐ Letter/Fax

Patron Type required [ticksheet]
☐ USF Undergraduate Student
☐ USF Graduate Student
☐ USF Faculty/Staff
☐ Community User
☐ Project Partner
☐ Visiting Scholar
☐ Donor
☐ Other or Unknown

Purpose of Reading Room Contact required [ticksheet]
☐ Material Retrieval
☐ Basic Reference Assistance
☐ Using CORAL
☐ Viewing an Exhibit
☐ Technical
☐ Directional/General Information (library)
☐ Directional/General Information (campus/other)
☐ Other:

Question/Comment/Notes

Outcome (Answer/Sources/Referral/Etc)

Submit

☐ Escalate to Knowledge Tracker

Appendix 3: Reading Room Patron Survey

1-Minute Special Collections Reading Room Survey

1. Please respond to the following statements regarding Reading Room staff and facilities:

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
A staff member provided helpful service.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A staff member retrieved my materials in a timely manner.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reading Room hours of service met my needs.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The Reading Room offered a quiet place to work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The Special & Digital Collections website was easy to use.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Photocopying / duplication services met my needs.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I met my research goals during this visit.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I had a positive overall experience.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

2. Which best characterizes the project that motivated your visit to Special Collections?

- ☐ Class assignment
- ☐ Dissertation or thesis
- ☐ Publication (e.g. article, book)
- ☐ Curriculum development / teaching preparation
- ☐ Family history / genealogy project
- ☐ Administrative or work-related assignment
- ☐ Other (please specify):

3. Which best describes you?

- ☐ Undergraduate student
- ☐ Master's student
- ☐ Doctoral student
- ☐ Faculty member or post-doc
- ☐ University staff
- ☐ Community user

4. What can we do to improve your experience in the Special Collections Reading Room?

Appendix 4: Website and CORAL Usability Testing Questions

Demographic information:

1. Preferred browser:
2. Status (circle one):
undergraduate student graduate student not a student

Special Collections website:

1. From Library homepage, navigate to Special Collections website.
2. What are the department hours on Saturday?
3. Where is the reading room located?
4. How do you request an item for use in the reading room?
5. Does Special Collections have a science fiction collection?
6. Does Special Collections have a Lebanese antiquities collection?
7. Does Special Collections have an Italian studies collection?
8. You need more information about Ybor City. Who would you contact? How would you contact him/her/them?
9. Are you allowed to make photocopies in the reading room?
10. Are you allowed to bring a digital camera into the reading room?

CORAL and the Digital Collections website:

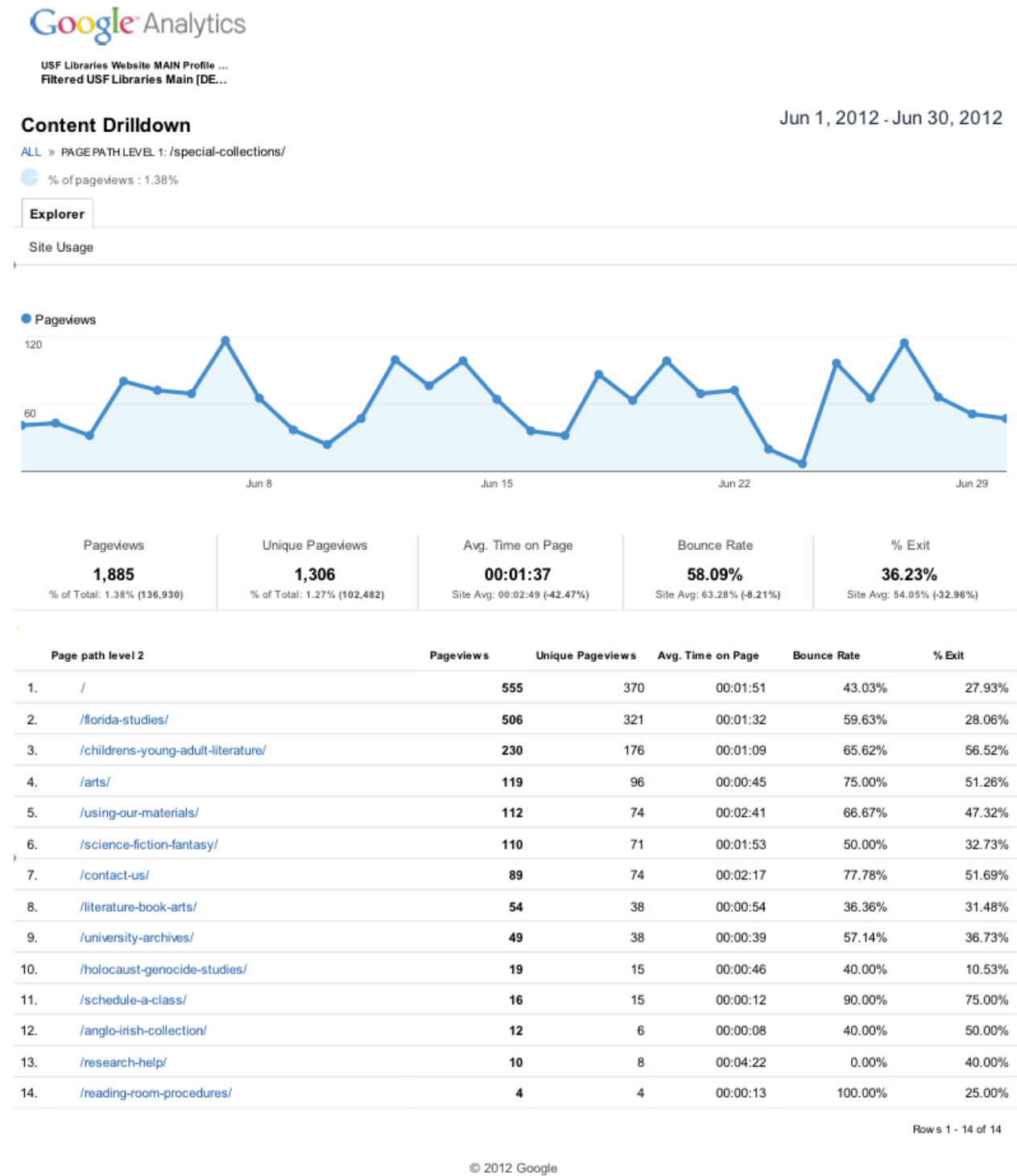
1. From the library home page, navigate to Digital Collections website.
2. Find a photograph of a cigar factory.
3. Find a photograph taken by the Burgert Brothers.
4. Download and save a photograph taken by the Burgert Brothers at 150 dpi.
5. How many digital photograph collections are there?
6. Find a way to search only the Florida Map Collection.

7. Find a Florida slave narrative from 1936.
8. Without performing a search, can you determine if you should be able to find an oral history interview in CORAL?
9. Are there old issues of the Tampa Tribune in CORAL?
10. In the Library catalog, find a record for a photograph of a cigar factory taken by the Burgert Brothers. Can you get from the record in the catalog to the photograph?

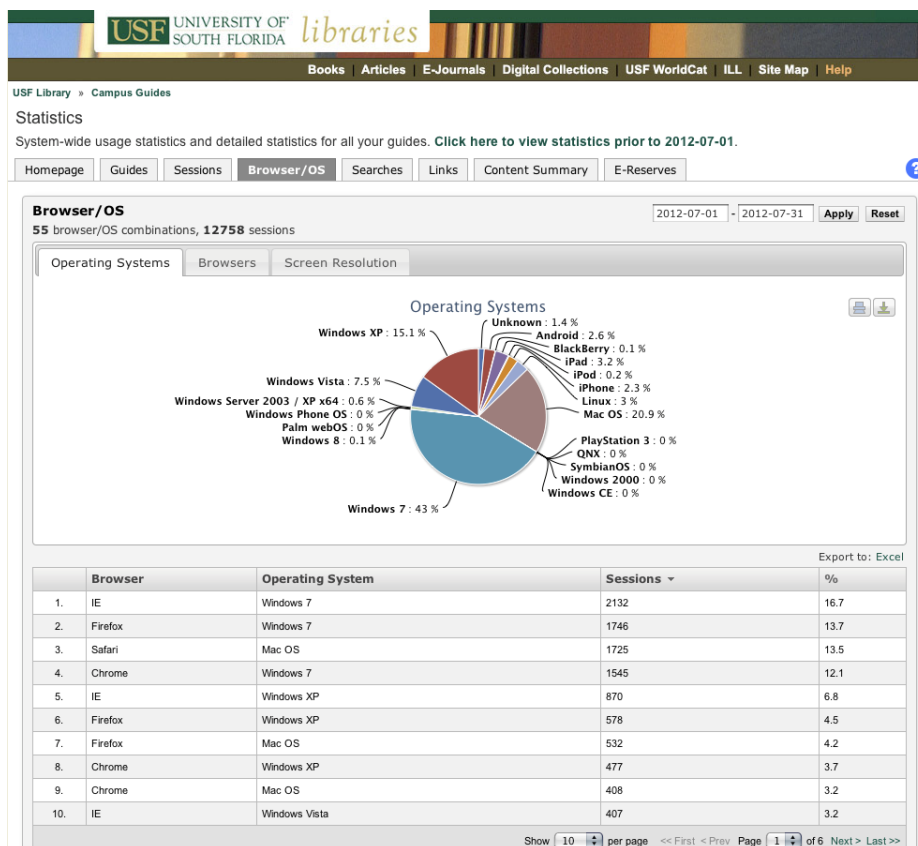
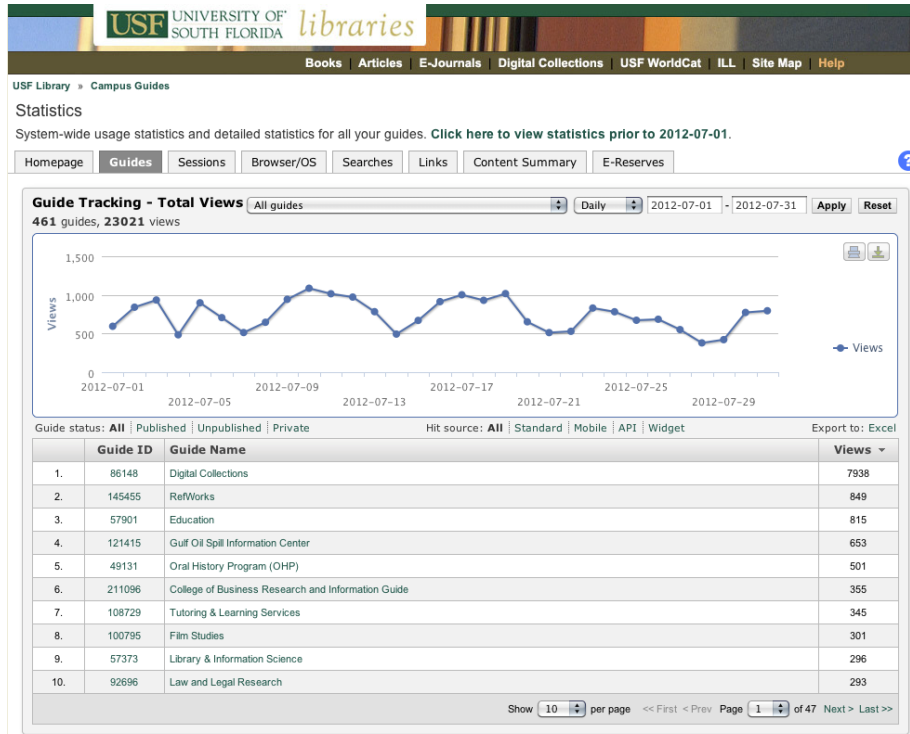
Post-test questions:

1. How easy was it for you to navigate from the main Library website to the Special Collections and the Digital Collections websites?
2. How easy was it for you to navigate through the Special Collections and the Digital collections websites? What would have made it easier?
3. Was there too much text on the websites? Too little text?
4. What is your #1 recommendation for making CORAL easier to use?
5. Of the tasks you were asked to do, which ones were the hardest? What would have made them easier?
6. What information is not on the websites that you would like to see there?

Appendix 5: Google Analytics Report for SDC WordPress Pages



Appendix 6: LibGuides Statistics Reports



¹ For examples of USF Tampa Library statistics reported to the National Center for Education Statistics (IPEDS), Association of Southeastern Research Libraries, and Association of College and Research Libraries, see <http://www.lib.usf.edu/academic-services/public-services-statistics/>.

² For more information about Project SAILS, see <https://www.projectsails.org> and <http://www.trails-9.org>). On SAILS's development and utility, see Juliet Rumble and Nancy Noe, "Project SAILS: Launching Information Literacy Assessment Across University Waters," *Technical Services Quarterly* 26:4 (2009), 287-298; Yvonne Mery, Jill Newby, and Ke Peng, "Why One-shot Information Literacy Sessions Are Not the Future of Instruction: A Case for Online Credit Courses," *College & Research Libraries* 73 (July 2012), 366-377; Kerry Sutherland, "Librarians as Literacy Sponsors: A Critique of Information Literacy Assessment Tools," *Progressive Librarian* 33 (Summer/Fall 2009), 18-25.

³ See <http://usfweb3.usf.edu/studentsuccess/about/Student-Success-Task-Force-Final-Report.pdf>.

⁴ For more information on the USF Office of Student Success and its task force report, see <http://usfweb3.usf.edu/studentsuccess/index.htm> and <http://usfweb3.usf.edu/studentsuccess/about/Student-Success-Task-Force-Final-Report.pdf>.

⁵ The total state appropriation includes general revenue and lottery funds. See *Operating Budget, 2011-2012*, Budget and Policy Analysis, University of South Florida, http://usfweb2.usf.edu/bpa/OB/11-12/1112_Operating_Budget_Web.pdf, p. 1 – 5.

⁶ The USF fiscal year runs July 1-June 30. See *Library Statistical Summary, 2007-08* and *Library Statistical Summary, 2010-11* at <http://guides.lib.usf.edu/academicresources>.

⁷ Search conducted August 19, 2012 in Library Literature & Information Science Full Text, Boolean/Phrase: Library AND Assessment, Limiters: Scholarly (Peer Reviewed) Journals, Document Type: Article, Publication Date: 1990-1999, 2000-2009, 2010-2012.

⁸ *Resetting Strategic Direction: Final Report*, May 2011, Office of the Dean, University of South Florida Libraries, <http://guides.lib.usf.edu/dean-usf-libraries>.

⁹ See "The Bancroft Library Manuscripts Survey Project," accessed August 20, 2012, http://bancroft.berkeley.edu/info/mss_survey/index.html and "PACSCL Hidden Collections Processing Project," accessed August 20, 2012, <http://clir.pacscl.org/> for examples of well-known special collections assessment toolkits.

¹⁰ Terry Abraham, Stephen Balzarini, and Anne Frantilla, "What Is Backlog Is Prologue: A Measurement of Archival Processing," *American Archivist* 48,1 (1985): 31-44.

¹¹ Paul Ericksen and Robert Shuster, "Beneficial Shocks: The Place of Processing-Cost Analysis in Archival Administration," *American Archivist* 58, 1 (1995): 32-52.

¹² Barbara Jones, "Hidden Collections, Scholarly Barriers: Creating Access to Unprocessed Special Collections Materials in America's Research Libraries, *RBM: A Journal of Rare Books, Manuscripts, & Cultural Heritage* 5 (2004): 88-105.

¹³ M. Winslow Lundy, "Provenance Evidence in Bibliographic Records: Demonstrating the Value of Best Practices in Special Collections Cataloging," *Library Resources & Technical Services* 52, 3 (2008): 164-172.

¹⁴ Paul Green, "A Method for Undertaking a Full Conservation Audit of Special Collections of Books and Manuscripts," *Collection Management* 28, 4 (2004): 23-42.

¹⁵ Mark Greene and Dennis Meissner, "More Product, Less Process: Revamping Traditional Archival Processing," *American Archivist* 68 (2005): 208-263.

¹⁶ "Archival Metrics: Promoting a Culture of Assessment in Archives and Special Collections," accessed August 20, 2012, <http://archivalmetrics.org/>.

¹⁷ Joyce Chapman and Elizabeth Yakel, "Data-driven Management and Interoperable Metrics for Special Collections and Archives User Services," forthcoming, *RBM* 13, 2 (2012).

¹⁸ USF's Institutional Review Board granted an exemption for all of the surveys and usability testing tools discussed below.