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## Jumping In: Creating an Assessment program for the L. Tom Perry Special Collections Reading Room

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# Jumping In: Creating an Assessment program for the L. Tom Perry Special Collections Reading Room

J. Gordon Daines III  
Cindy R. Brightenburg

## ABSTRACT

This case study describes the development and implementation of a formalized assessment program for the L. Tom Perry Special Collections reading room and reference desk. This assessment program had two principal goals: 1) to provide information to the reference staff that would help them better manage the reference desk and to improve the service provided to patrons and 2) to gather information that could be shared with curators and department leadership in order to help them make better collection management decisions. The case study looks at the kinds of statistics utilized by the department, the impact of the assessment program on the reference staff, the administrative uses of the statistics gathered by the reference staff, and the benefits of aligning the assessment program with national standards.

The L. Tom Perry Special Collections (hereafter, Perry Special Collections) gathers statistical information in order to make informed decisions about how to best utilize resources to meet the needs of their patrons. This case study describes the development and implementation of a formalized assessment program for the department's reading room and reference desk. This assessment program had two principal goals: 1) to provide information to the reference staff that would help them better manage the reference desk and to improve the service provided to patrons and 2) to gather information that could be shared with curators and department leadership in order to help them make better collection management decisions. The case study looks at the kinds of statistics utilized by the department, the impact of the assessment program on the reference staff, the administrative uses of the statistics gathered by the reference staff, and the benefits of aligning the assessment program with national standards.

The Perry Special Collections reference staff became interested in broadening their assessment program and sharing the resultant information with curatorial

colleagues in 2013. This decision was driven by reference staff interest in enhancing the services provided to patrons and a desire to better use limited resources. There was also curatorial interest in making better decisions related to collection management. Curators hoped that usage data would indicate what items were of most interest to patrons so that those items could then be queued up to be digitized. They also hoped to use the data to drive decisions about which archival and manuscript collections should be more deeply processed.

The concept of a formalized assessment program based on shareable metrics received another boost when curators and reference staff became familiar with the work of the joint SAA-ACRL/RBMS (Society of American Archivists and the Rare Book and Manuscripts Section of the Association of College and Research Libraries) task force on statistical measures and metrics for public services. The purpose of these guidelines is “to help archival repositories and special collections libraries quantify in meaningful terms the services they provide their constituencies and evaluate the effectiveness and efficiency of the operations that support those services.”<sup>1</sup> Curators and department reference staff recognized that the statistical information outlined in the draft standard could be very useful to help the department better manage its resources.

## Literature Review

Higher education models have been transitioning over the last decade and this has important implications for archival and special collections repositories affiliated with colleges and universities.<sup>2</sup> A key component of this transition has been a shift in the nature of decision-making from prioritizing assumed knowledge (anecdotal stories) to hard evidence (metrics). This has had a direct impact on archives and special collections trying to articulate the value propositions that they bring to their institutional homes. The term value proposition is borrowed from business and “describes the benefits customers can expect from your products and services.”<sup>3</sup> This transition has also caused archivists and special collections librarians to begin focusing on the need to develop and implement sustainable assessment programs that provide both quantitative and qualitative data that can be used to show the impact of archives and special collections on the education of students.

1. “Standardized Statistical Measures and Metrics for Public Services in Archival Repositories and Special Collections Libraries,” Society of American Archivists-Association College Research Libraries/ Rare Book and Manuscripts Section, [https://www2.archivists.org/sites/all/files/Standardized%20Statistical%20Measures%20and%20Metrics%20for%20Public%20Services%20in%20Archival%20Repositories%20and%20Special%20Collections%20Libraries\\_011718\\_0.pdf](https://www2.archivists.org/sites/all/files/Standardized%20Statistical%20Measures%20and%20Metrics%20for%20Public%20Services%20in%20Archival%20Repositories%20and%20Special%20Collections%20Libraries_011718_0.pdf), 6.
2. For an interesting look at the changing role of higher education, see: Judith A. Ramaley, “The Changing Role of Higher Education: Learning to Deal with Wicked Problems,” *Journal of Higher Education Outreach and Engagement* 18, no. 3 (2014): 7-22.
3. Alexander Osterwalder, Yves Pigneur, Gregory Bernarda, and Alan Smith, *Value Proposition Design: How to Create Products and Services Customers Want* (New Jersey: John Wiley & Sons, 2014), 6.

Archival interest in metrics dates back to the 1960s and the establishment of a Committee on Uniform Archival Statistics by the Society of American Archivists.<sup>4</sup> Unfortunately, common metrics did not emerge until early in the 21st century when it became clear that special collections and archival repositories needed to be able to articulate their distinctive value and “identify metrics that demonstrate how they have been contributing to the mission of their parent institutions and the larger academic enterprise they serve.”<sup>5</sup> Lisa Carter tied the need for assessable metrics to the ability to answer the question “while our special collections and archives may have inherent value based on their rarity or uniqueness, how can we prove that they have relevance in today’s research, teaching, and learning environments?”<sup>6</sup> Anne Bahde and Heather Smedberg further pointed out that “to show how special collections and archives contribute meaningfully to instructional outcomes, we must find formal assessment techniques and strategies that can comprehensively measure our impact through both quantitative and qualitative means.”<sup>7</sup> It is clear that an ability to show the value proposition of archives and special collections has driven much interest in assessment.

Attentiveness to assessment has also been driven by the need to responsibly manage the resources given to archives and special collections. In 2010, Elizabeth Yakel and Helen Tibbo argued that “the development and adoption of standardized metrics to support the management of both analog and digital collections is a critical need in archives and manuscript collections.”<sup>8</sup> Additionally, Melanie Griffin, Barbara Lewis, and Mark I. Greenberg described how assessment data, gathered from looking at the University of South Florida’s Special and Digital Collections department, “impacted the department’s practices, informing decisions made about staff skill sets, training, and scheduling; outreach activities; and prioritizing technical services.”<sup>9</sup> Furthermore, Joyce Chapman and Elizabeth Yakel have pointed out that archival and special collections repositories should be “leveraging operational data to support

4. Christian Dupont and Elizabeth Yakel, “‘What’s So Special about Special Collections?’ Or, Assessing the Value Special Collections Bring to Academic Libraries,” *Evidence Based Library and Information Practice* 8, no. 2 (2013): 12.
5. *Ibid.*, 12.
6. Lisa R. Carter, “Articulating Value: Building A Culture of Assessment in Special Collections,” *RBM: A Journal of Rare Books, Manuscripts, and Cultural Heritage* 13, no. 2 (2012): 91.
7. Anne Bahde and Heather Smedberg, “Measuring The Magic: Assessment in The Special Collections and Archives Classroom,” *RBM: A Journal of Rare Books, Manuscripts, and Cultural Heritage* 13, no. 2 (2012): 152-174.
8. Elizabeth Yakel and Helen Tibbo, “Standardized Survey Tools for Assessment in Archives and Special Collections,” *Performance Measurement and Metrics* 11, no. 2 (2010): 212.
9. Melanie Griffin, Barbara Lewis, and Mark I. Greenberg, “Data-Driven Decision Making: An Holistic Approach to Assessment in Special Collections Repositories,” *Evidence Based Library and Information Practice* 8, no. 2 (2013): 236.

decision making.”<sup>10</sup> They argue that archival and special collections repositories are already gathering much of this data. The use of data allows repository leaders to make better informed decisions and to ensure that they are leveraging the limited resources that they receive.

Standardized metrics also allow for the sharing of data across repositories and this facilitates the development of best practices and efficiencies. It enables repositories to benchmark their performance against that of their peers. Jackie Dooley and Katherine Luce convincingly argued in their 2010 report *Taking Our Pulse* that a “lack of established metrics limits collecting, analyzing, and comparing statistics across the special collections community. Norms for tracking and assessing user services, metadata creation, archival processing, digital production, and other activities are necessary for measuring institutions against community norms and for demonstrating locally that primary constituencies are being well served.”<sup>11</sup> Hayrunnisa Bakkalbasi and Jocelyn K. Wilk discuss the development of an assessment program at Columbia University and show how they were better able to understand their patrons, the needs of those patrons, and gauge the effectiveness of their collections and services. They highlight the importance of developing a culture of assessment that impacts how archival and special collections librarians do their work.<sup>12</sup>

Yakel and Christian Dupont articulate the power of defining usage metrics and establishing a culture of assessment in special collections and archival repositories. They point out that the “goal of defining usage metrics for special collections and archives at academic institutions is ultimately to better assess and articulate their value propositions in the context of the rapidly evolving landscape of research libraries.”<sup>13</sup> The case study that follows examines how the Perry Special Collections is attempting to develop a culture of assessment that will enable it to better articulate the value proposition that it brings to the Harold B. Lee Library and Brigham Young University while enabling more efficient use of departmental resources. It also aims to fill a gap in the literature regarding the implementation of assessment activities in special collections repositories.

10. Joyce Chapman and Elizabeth Yakel, “Data-Driven Management and Interoperable Metrics for Special Collections and Archives User Services,” *RBM: A Journal of Rare Books, Manuscripts, and Cultural Heritage* 13, no. 2 (2012): 151.

11. Jackie M. Dooley and Katherine Luce, *Taking Our Pulse: The OCLC Research Survey of Special Collections and Archives* (Dublin, OH: OCLC Research, 2010), <https://www.oclc.org/content/dam/research/publications/library/2010/2010-11.pdf> (accessed March 14, 2019).

12. Hayrunnisa H. Bakkalbasi and Jocelyn K. Wilk, “Getting to Know You (and Me!): Assessment and The Archival Metrics Toolkit at Columbia University’s Rare Book and Manuscript Library,” in *Proceedings of the 2014 Library Assessment Conference: Building Effective, Sustainable, Practical Assessment*, August 4-6, 2014, Seattle, WA, Association of Research Libraries, 2015, 194-203.

13. Dupont and Yakel, “What’s So Special about Special Collections?,” 18.

## Statistics in the L. Tom Perry Special Collections

The Perry Special Collections has gathered information related to the use of its collections for at least three decades. This data included counts of the number of books and number of manuscripts collections utilized by patrons as well as demographic information about patrons. This data was seen as being primarily for internal use and was not kept in an easily analyzable format. The information was recorded on paper forms and filed alphabetically by patron name and then chronologically by year. Counts of the number of items used were shared with the library administration for use in reporting to national organizations.<sup>14</sup>

## Initial Efforts at Gathering Shareable Statistics

In 2013, Russ Taylor, then Supervisor of Reference Services, and Gordon Daines, then University Archivist, began to develop a formal assessment program designed to gather shareable metrics that could be used to inform departmental resource decisions. They asked Cindy Brightenburg, the department's Reference Specialist, to begin providing the curatorial staff with information on the collections being used in the reading room. She was specifically asked to provide information that would help the curators make informed decisions related to the management of the materials that they were responsible for. Brightenburg, Taylor, and Daines worked together to determine the kinds of information that would be most useful to curators. They identified specific questions that they were trying to answer and used those questions to identify data elements that could potentially provide answers to those questions. Table 1 indicates the data elements selected, their definition, and the questions that the department was trying to answer. Once the data elements were identified, the reference staff began producing reports for the curatorial staff.

The reference staff decided that a master spreadsheet should be created on a monthly basis to track all information associated with these data elements for both print and manuscript collections that are used in the reading room. At the end of each month, a member of the reference staff uses the information in the master spreadsheet to create individual reports for each curator. These reports contain the same fields as the master spreadsheet but are limited to the materials from the curator's collecting areas (see Appendix A: Usage Report for Curators). The information in these reports is used by curators to make resource decisions about the materials that they are responsible for. The major reason for creating these reports was to provide curators with additional information that would be useful in helping them make determinations regarding conservation work, digitization, and processing.

These initial reports were extremely useful to curators and accomplished many of the aims that they had been created for. However, they were based on local best

14. Gordon Daines conversation with Russ Taylor, March 9, 2018.

Table 1. Data elements and purposes from the first iteration of data gathering in the Perry Special Collections

Data Element	Description	Questions
<b>Date</b>	The calendar date that the materials were used	<ul style="list-style-type: none"> <li>• How often are collections used by patrons?</li> <li>• Are there specific times or periods of times when resources are heavily used?</li> </ul>
<b>Location</b>	The physical area in the department where materials are stored	<ul style="list-style-type: none"> <li>• Where are materials located?</li> <li>• What elements of the collection are being used (i.e. vault materials, general stacks, etc.)?</li> <li>• Are the materials requested manuscripts or books?</li> </ul>
<b>Call number</b>	Permanent identifier that enables the accurate tracking of the item	<ul style="list-style-type: none"> <li>• How do we access information in department and library records about the materials?</li> <li>• How do we appropriately track materials?</li> </ul>
<b>Title</b>	A word or phrase by which the material being described is known or can be identified	<ul style="list-style-type: none"> <li>• Has the correct item or materials been pulled for the patron?</li> <li>• What kinds of materials are being used by our patrons?</li> </ul>
<b>Patron type</b>	Category the patron falls into from a predetermined list (i.e. student, visiting researcher, faculty, family history, interlibrary loan, digital imaging lab)	<ul style="list-style-type: none"> <li>• Who is using our materials?</li> <li>• Are we meeting the needs of our target demographic (students and faculty)?</li> <li>• What sort of internal use are the materials receiving?</li> </ul>
<b>Copy request</b>	Denotes whether a request for either a digital or physical copy was requested by the patron	<ul style="list-style-type: none"> <li>• What kinds of materials receive copy requests?</li> <li>• Do specific materials receive consistent copy requests?</li> <li>• What materials could potentially be digitized?</li> </ul>
<b>Notes</b>	Field to record any additional information that might be of value to the curator	<ul style="list-style-type: none"> <li>• Do collections need deeper processing?</li> <li>• Do materials need conservation work?</li> <li>• What other information might be useful to the curators?</li> </ul>

Table 2. Comparison of the SAA/ACRL-RBMS Public Services Metrics data elements and the Perry Special Collections local report data elements

SAA/ACRL-RBMS Public Service Metrics data element	Perry Special Collections local report data element
Purpose of use	
Reference transactions by day	
Type of contact	
Patron type	Patron type
Duration	
Total visits per day	Date
Average visits length per day	Date
Visits per day of the week	Date
Number of new and returning patrons	
Total copy orders per day/month	Copy request
Total pages copied per day/month	
Checkouts per day	
	Notes
	Location
	Call number
	Title

practices and reference staff wondered if there was national guidance on what types of data points should be collected at a special collections reference desk.

### Maturing Assessment Efforts

The department became aware of work of the SAA/ACRL-RBMS Joint Task Force on Public Service Metrics in 2016 and quickly obtained a draft copy of the standard that they were developing. They were excited to learn that a national standard was being developed and hoped that it would help them improve their assessment program.

Gordon Daines, in a new position as the current Supervisor of Reference Services, and Special Collections Reference Specialist Cindy Brightenburg held several

meetings to talk about which of the data points mentioned in the draft standard made the most sense in their context. They decided that it would be useful to gather statistics for the following data elements: purpose of use, reference transactions by day, type of contact, patron type, duration, total visits per day, average visits length per day, visits per day of the week, number of new and returning patrons, total copy orders per day/month, total pages copied per day/month, and checkouts per day. While the reference desk was already gathering information for some of these data elements, many were new. Table 2 indicates the elements selected from the SAA/ACRL-RBMS Public Services Metrics and their corollary in the Perry Special Collections local reports. Note that several of the recommended data elements provide more granularity than the Perry Special Collections local reports.

The data element review created an opportunity to look at existing assessment activities and to package the data being gathered in new ways. Reference staff decided to continue producing the original report because it was clearly capturing different information from the reports that would be generated using the SAA/ACRL-RBMS Public Service Metrics recommendations. They also decided to begin generating a new report based on the developing standard (see Appendix B: Reading Room Statistical Report). Table 3 describes the data elements selected from the SAA/ACRL-RBMS Public Service Metrics, their definition, and the questions that the department was trying to answer. The generated reports supplement the Perry Special Collections local report.

Reference staff created a new series of documents to track this additional information. These documents are category based and the information contained in them is used to create a monthly report that is submitted to the Supervisor of Reference Services who then reviews the data and makes resource determinations based on it. The data is also made available to curators if they are interested in it. It is important to note that curators still continue to receive the initial report created in 2013.

## Statistics Gathering and the Reference Desk

There was some concern that adding additional data gathering would be a burden to the reference desk, but that did not turn out to be the case since much of the data was already being gathered by the reference staff for use in its monthly curatorial reports. Staff pulled collection use statistics from a variety of sources: information on material used was gathered from call slips and the library's circulation system; patron type and research purpose were taken from patron registration forms; copy order statistics came from internal copy order forms; and reference transactions were tracked by a software widget used by reference desks library-wide. Reference staff added in a few new data-gathering techniques to start tracking the additional data elements. For example, reading room use in terms of number of hours per visit had not been previously measured. This required the design and implementation of a reading room log. Users were asked to sign in and out for the first time, which caused some initial confusion, and staff often forgot to ask patrons to use the log. At first,

Table 3. Data elements selected from the SAA/ACRL-RBMS Public Service Metrics

Data element	Description	Question
<b>Purpose of use</b>	Reason that patrons are using materials from a predetermined list	<ul style="list-style-type: none"> <li>• How successful is the department in integrating Special Collections materials into class assignments?</li> <li>• Beyond class assignments, how are our collections being used?</li> </ul>
<b>Reference transactions by day</b>	Number of transactions by day	<ul style="list-style-type: none"> <li>• How often do reference staff interact with patrons?</li> </ul>
<b>Type of contact</b>	Manner in which the contact occurred (i.e., chat/instant messaging, telephone, email, in-person)	<ul style="list-style-type: none"> <li>• What type of interactions are reference staff having with patrons?</li> </ul>
<b>Patron type</b>	Records whether a patron is an undergraduate student, a graduate student, faculty/staff, community member, family historian, or a visiting researcher	<ul style="list-style-type: none"> <li>• Are we meeting the needs of our target demographic?</li> <li>• Which user groups are using which kinds of material?</li> </ul>
<b>Duration</b>	Length of reference transactions in five main categories (less than 1 minute, 1-5 minutes, 6-15 minutes, 16-30 minutes, and over 30 minutes)	<ul style="list-style-type: none"> <li>• How long are reference transactions lasting?</li> <li>• What implications do the length of transactions have on staffing?</li> </ul>
<b>Total visits per day</b>	Unique number of patrons visiting the reading room per day	<ul style="list-style-type: none"> <li>• How are collections being used?</li> <li>• How should the reading room be staffed?</li> <li>• Are current facilities adequate to needs?</li> </ul>
<b>Average visits length per day</b>	Average length of time that a patron stays in the reading room	<ul style="list-style-type: none"> <li>• Are department hours adequate?</li> <li>• Do we have enough physical space for all patrons?</li> </ul>
<b>Visits per day of the week</b>	Aggregation of the total number of patrons by day of the week	<ul style="list-style-type: none"> <li>• How is the reading room used?</li> <li>• What are the busy times that require more staff?</li> </ul>

<b>Total copy orders per day/ month</b>	Number of physical and digital copy orders per day	<ul style="list-style-type: none"> <li>Do we have appropriate equipment for copy orders?</li> </ul>
<b>Total pages copied per day/ month</b>	Total number of pages copied per day	<ul style="list-style-type: none"> <li>Are staffing levels adequate to fill copy orders and service patrons in the reading room?</li> </ul>
<b>Checkouts per day</b>	Number of items checked out through the library's circulation system per day	<ul style="list-style-type: none"> <li>How is the collection being used?</li> <li>Are specific elements receiving more usage than others?</li> </ul>

both patrons and staff expressed annoyance as it was an additional requirement in an already long procedure to use materials in Special Collections, but after a few weeks it became an unnoticeable addition. It was also discovered that there was an incomplete view of new and returning patrons and their research purposes. Previously, patrons using manuscript collections were required to fill out paper registration forms. Patrons requesting books were not required to fill out that form. In addition, the form did not allow for changes in research purposes or patron type on the paperwork at subsequent visits. Now it is mandatory for all patrons to complete the registration form regardless of what materials they request. Additionally, patrons must indicate their purpose of research on their form on each day of their subsequent visits. This led to an increase of paper forms to be filed, but it has furnished a much more complete view of the patrons. Once again, this shift in policy easily became standard practice within a few weeks.

The system for generating monthly statistical reports required additional work for the reference staff as they now needed to aggregate the data into a single report. This was done by entering the data into Excel spreadsheets. To ensure uniformity, templates were created so that staff could easily enter data as part of opening procedures and during down time at the reference desk. The reading room logs, which contain date, name, time in and time out, are entered by staff at the reference desk, taking less than 10 minutes per page when the log page is full.

The next step in creating monthly reports required assigning one staff member, adept at using Excel, to collect the data from the various spreadsheets, create graphs, and ensure accuracy. There was some difficulty understanding the complex time formulas needed for reading room use duration and averages, but collaboration with the library information technology office was key in providing training on how to formulate the necessary fields. In addition, when data-gathering questions arose, such as how many times to count reading room use per patron, per day, the SAA/ACRL-RBMS Joint Task Force on Public Service Metrics draft was consulted and proved helpful in furnishing clear guidelines. The monthly reports take the most time to complete, typically three hours of staff time per month. However, the employee

assigned to this task does so while staffing a desk with the least amount of traffic and workflow. Overall, the new procedures of gathering and keeping statistics began with some uneasiness from the staff, but in a short time became routine.

## Administrative Uses of Statistics

The statistics gathered by the reference staff are utilized in a number of ways. They help the curators make decisions about managing collections, the supervisor of reference services manage the reference staff, and the department chair make resource decisions and inform other administrators about the value of Special Collections.

Curators are provided with information on the usage of their collections to help them make decisions about digitization and processing. Both book and manuscript curators use the reports to flag items that are being used frequently in the reading room. If books are out of copyright, then they are sent for digitization. If manuscript collections are flagged, curators can consider digitization or deeper processing. If the processing level is appropriate (file or item level), then the curator has the option of sending the collection directly for digitization. If the processing level is at the collection or series level, then the curator has the option of proposing deeper processing in order to facilitate better access or in preparation for digitization.

Daines, the supervisor of reference services, utilizes the statistical reports to assess how the reading room is being used and to determine staffing levels. Data related to the frequency of reading room use is very helpful for understanding which days of the week and which hours of those days are the busiest. This has a direct impact on the scheduling of student reference assistants. Working collaboratively with Brightenburg, Daines works to ensure that student staffing levels are appropriate for the reading room when it is busiest. Patron demographic data such as new versus returning users and patron type help Daines understand whether the department is successfully accomplishing its instructional goals and see what impact, if any, the department's outreach programs are having on reading room usage. The reports indicated that new users tend to outnumber returning users during fall and winter semesters. This could indicate that the department's instructional sessions are empowering students to use the collections and many are coming to the reading room for the first time; it could also reflect the cycle of new students arriving at the university each fall.

The statistical reports have also been useful to the department chair (currently also Gordon Daines).<sup>15</sup> He utilizes the reports to determine staffing associated with

15. The department chair position in the L. Tom Perry Special Collections is a rotating appointment. Department members with continuing faculty status (BYU's equivalent to tenure) are eligible to serve as department chair. The chair is appointed to a three-year term and may be re-appointed to a second three-year term. Daines is currently in his second term.

the department's reference services, to allocate student labor resources to various units that make up the department, and to monitor collection usage. He also uses the reports to gain a better understanding of what types of patrons are using the reading room, the collections that they are using, and why they are using those particular collections. This information also helps to demonstrate the value proposition of the department to university administrators. The department has a long history of gathering anecdotal (qualitative) information about its services and it has been extremely useful to back that up with statistical (quantitative) information.

By looking at the number of ways that the Special Collections administration has utilized the new statistical reports, it is obvious that the department is making progress towards improving department procedures and workflows as well as examining ways to extend its assessment program to improve other department activities.

## Aligning with National Standards

While gathering statistics in special collections can be valuable at an institutional level, statistical data collected and compiled at a national level can provide demonstrable evidence of trends and patterns across institutions. For many years, ACRL and ARL have collected data from national academic libraries, including “data about public service activities such as circulation (initial and total), reference transactions, library instruction (group presentations and participants in these presentations), and interlibrary borrowing and lending.”<sup>16</sup> Concerning trends found in these reports have often spurred the creation of committees, which, in the end, stimulated nationwide collaborative conversations leading to viable solutions.

One of the most important considerations for the department's reference staff as they began formalizing their assessment program was ensuring that the data they were gathering would be consistent with data gathered by other institutions. This is one of the reasons for the decision to base the updated assessment reports on the SAA/ACRL-RBMS *Standardized Statistical Measures and Metrics for Public Services in Archival Repositories and Special Collections Libraries*. The benefits of aggregating statistical data on a national scale can serve the archival field in the same way. The data can indicate patterns that not only occur nationally, but also in geographically similar or diverse areas. Additionally, the data can provide comparisons between archives and reveal measurements for goals and benchmarks across the profession. By gathering data based on a national standard, the department gains the ability to share data and identify trends that are impacting regions or the country. It also gains the ability to look at trends at other institutions and to consider how those trends could

16. Martha Kyrillidou and Mark Young (eds.), *ARL Statistics 2003-04* (Washington, D.C.: Association of Research Libraries, 2005), 6, [http://www.libqual.org/documents/admin/2012/ARL\\_Stats/2003-04arlstats.pdf](http://www.libqual.org/documents/admin/2012/ARL_Stats/2003-04arlstats.pdf) (accessed July 13, 2018).

be impacting Special Collections. Daines and Brightenburg are looking forward to comparing the Perry Special Collections reference statistics with those of other institutions as more institutions adopt the new standard and begin sharing their data.

## Conclusion

The development of an assessment program for the Perry Special Collections reading room and reference desk had an almost immediate impact on the department. It provided information to curators that allowed them to make better decisions about which collections should be prioritized for conservation, digitization, or, in the case of manuscripts, deeper processing. It also provided department administrators with metrics that not only help to show that the department is meeting its primary goal of serving students, but also that its outreach program to faculty is bearing fruit as the number of new users is steadily increasing and a consistent number of users return to Special Collections after their initial exposure to the department. The program has also been used to determine reading room hours and ensure that the department is appropriately staffed. In addition, staff was able to quickly provide statistics when library administration asked for the number of student and faculty visits over the past year. It has proven to be extremely useful to be able to back up anecdotal evidence with hard metrics, and Special Collections leadership is looking at how they can extend the program to other areas of the department.

## Appendix A. Usage Report for Curators

**Reference Monthly Usage Statistics: Curator Report**

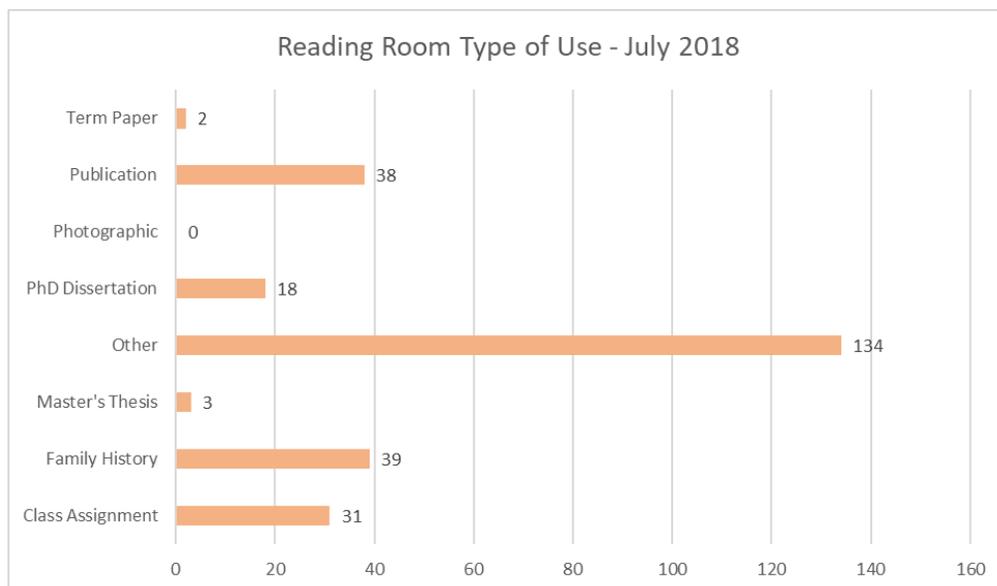
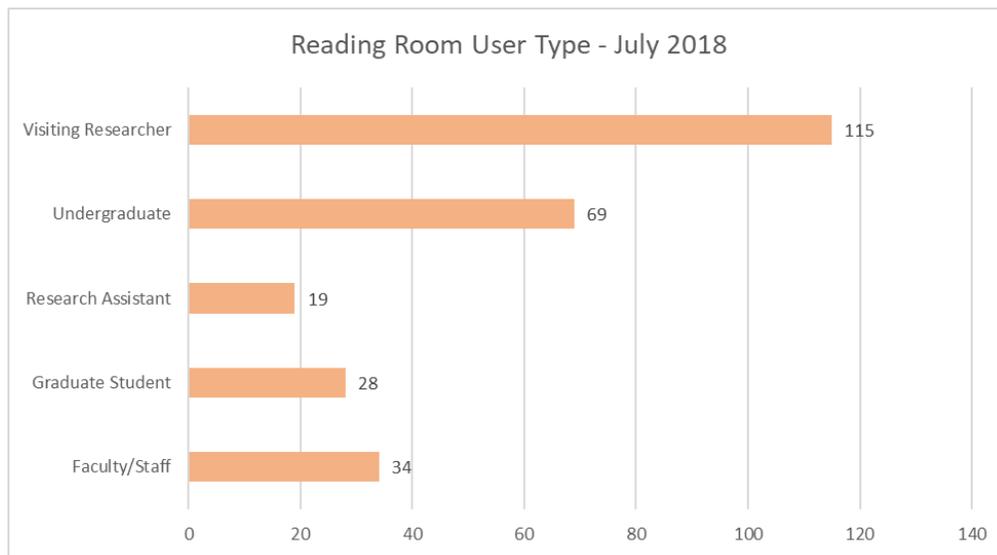
Jul-18 Patron type symbols : S = Student, VR = Visiting Researcher, F = Faculty, FH = Family History, ILL = Interlibrary Loan, DL = Digital Imaging Lab

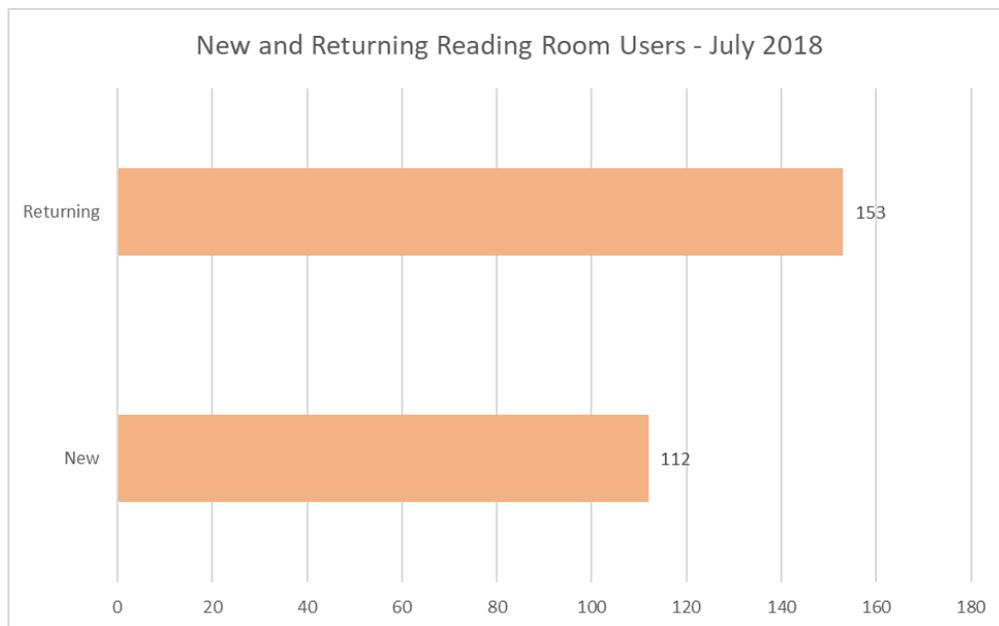
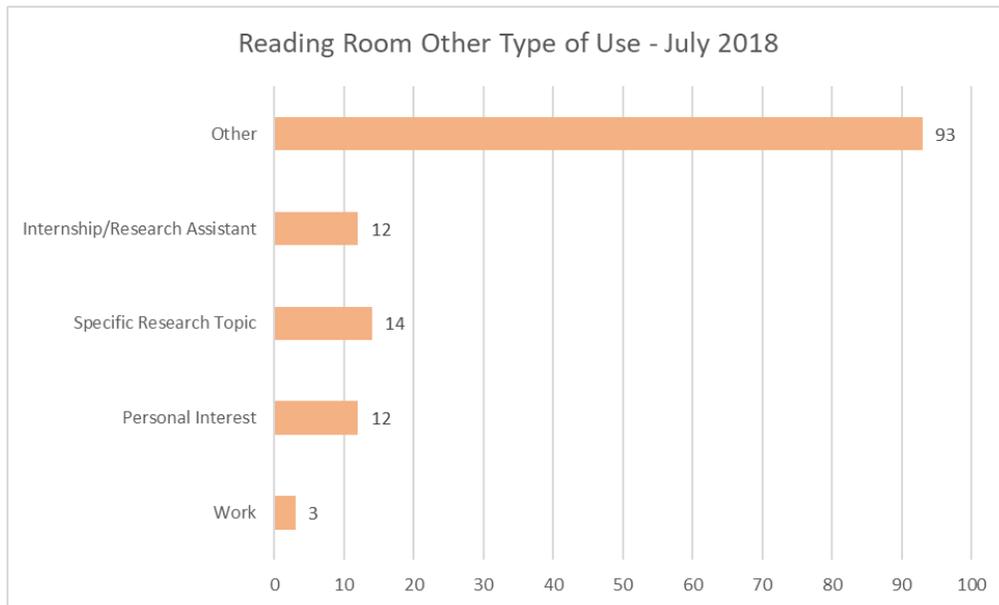
Date	Item Locat	Item Call Number	Item Title	Pat	Location	Curator	via	orders	Column1
07/11/2018	BYU	378.05.822.1956	Banyan 1956	VR	8/1/B/5	Cory Nimer			
07/11/2018	BYU	378.05.822.1965	Banyan 1965	VR	8/1/B/6	Cory Nimer			
07/16/2018	BYU	378.05.8758 vol. 19	White and Blue, "David Storr Jordan Visits Provo," Mar. 29, 1841	IH	8/10/F/3	Cory Nimer			Digitization Request
07/16/2018	BYU	378.05.8758 vol. 20	White and Blue, "We'll Serve Where You Want Us to Serve," 1841	IH	8/10/F/3	Cory Nimer			Digitization Request
07/16/2018	BYU	378.05.8758 vol. 21	White and Blue, "Spanish Flu Epidemic, Oct. 16, 1918	IH	8/10/F/3	Cory Nimer			Digitization Request
07/18/2018	BYU Q	378.05.876 vol. 35	Daily Universe vol. 35	IH	9/10/C/4	Cory Nimer			
07/02/2018	BYU Q	378.2.A1a no. 128	Commencement Address	F	6/14/C/3	Cory Nimer			
07/20/2018	BYU	378.2.D4193.2011	Real Men Can Dance, But Not in that costume	VR	8/2/E/6	Cory Nimer			
07/05/2018	BYU	378.2.J151	History of Motion Pictures	IH	8/4/A/2	Cory Nimer			
07/12/2018	BYU	378.2.M785.2002	The Book of Mormon: A Witness to the Historicity...	VR	8/5/B/3	Cory Nimer			
07/06/2018	BYU	378.2.T224	Solution to the Problem of Temperature	S	8/6/I/2	Cory Nimer			
07/27/2018	BYU	378.22.S193	Biography of George Albert Smith	S	8/10/A/3	Cory Nimer			
07/18/2018	BYU	378.23.T848.1990	The Museum of Church History and Art	VR	6/10/E/7	Cory Nimer			
07/05/2018	BYU	378.23.W872.1984	Foodstorage	VR	8/10/F/2	Cory Nimer			
07/25/2018	UA	MSS 2087	Oliver R. Smith papers; box 13 folder 19	S	15/11/C/4	Cory Nimer			
07/27/2018	UA	MSS 2087	Oliver R. Smith; boxes 8-9	S	15/11/C/2	Cory Nimer			
07/27/2018	UA	MSS 2087	Oliver R. Smith; boxes 6-7	S	15/11/C/1-2	Cory Nimer			
07/27/2018	UA	MSS 2087	Oliver R. Smith; boxes 10-12	S	15/11/C/3	Cory Nimer			
07/19/2018	UA	MSS 7554	Sterling J. Albrecht Papers	VR	12/4/L/7	Cory Nimer			
07/25/2018	UA	UA 1086	Wilkinson Papers; boxes 508-509	VR	18/16/F/1	Cory Nimer			
07/25/2018	UA	UA 1086	Wilkinson Papers; boxes 489-490	VR	18/16/F/6	Cory Nimer			
07/25/2018	UA	UA 1086	Wilkinson Papers; boxes 566-571	VR	18/16/F/8	Cory Nimer			
07/25/2018	UA	UA 1086	Wilkinson Papers; box 420	VR	18/16/D/5	Cory Nimer			
07/25/2018	UA	UA 1086	Wilkinson Papers; boxes 378-379	VR	18/16/C/8	Cory Nimer			
07/25/2018	UA	UA 1086	Wilkinson Papers; boxes 260-270-273	VR	18/16/B/3-4	Cory Nimer			

## Appendix B. Reading Room Statistical Report

### L. Tom Perry Special Collections Statistics Report, July 2018

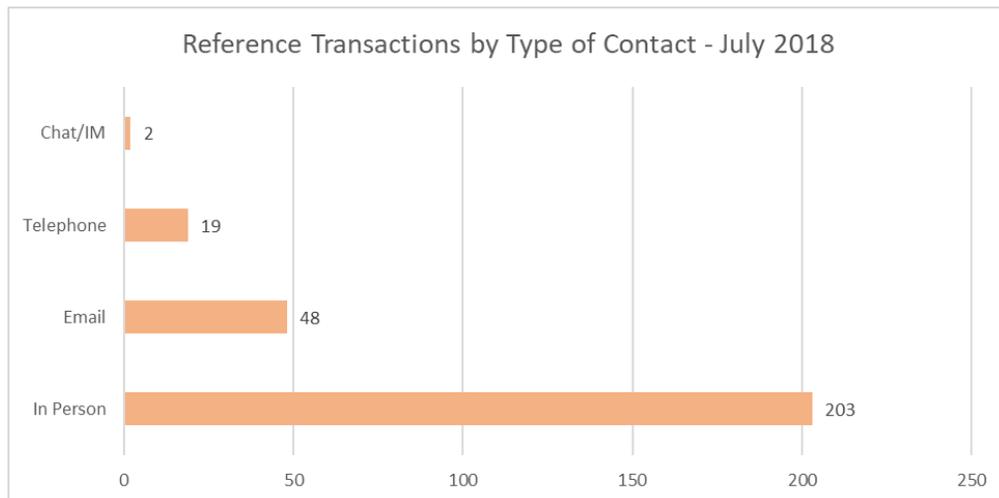
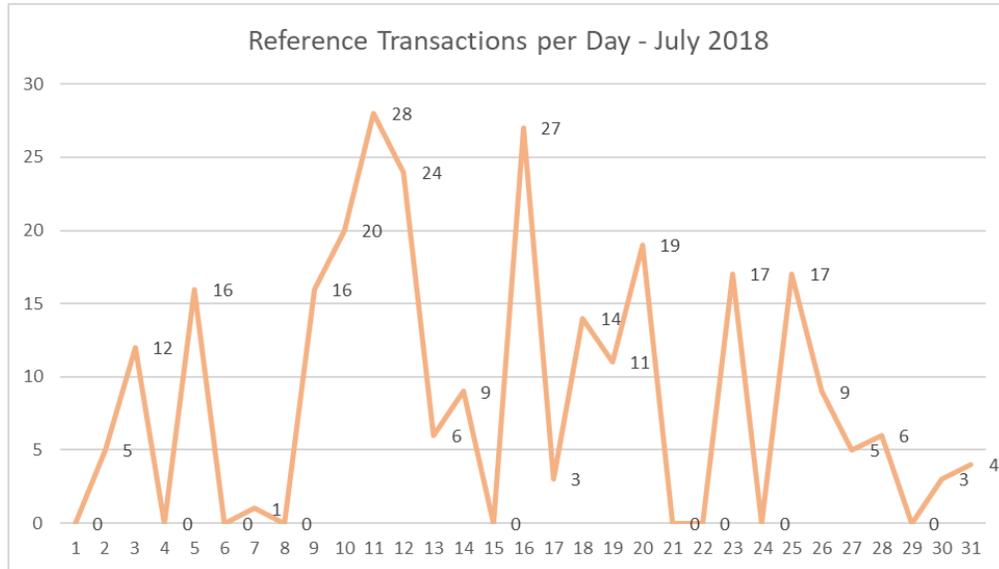
#### *Type of Use*

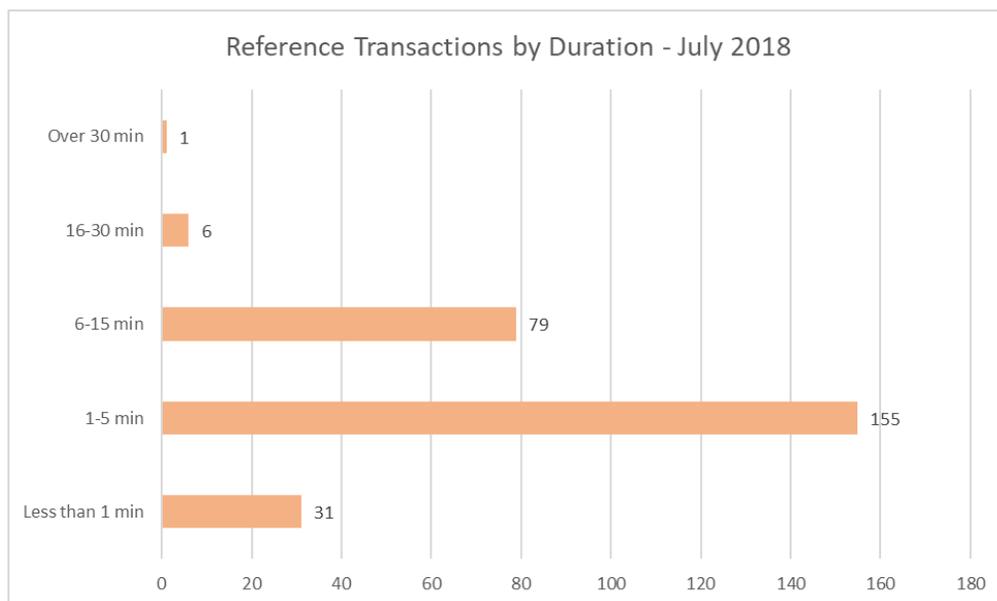
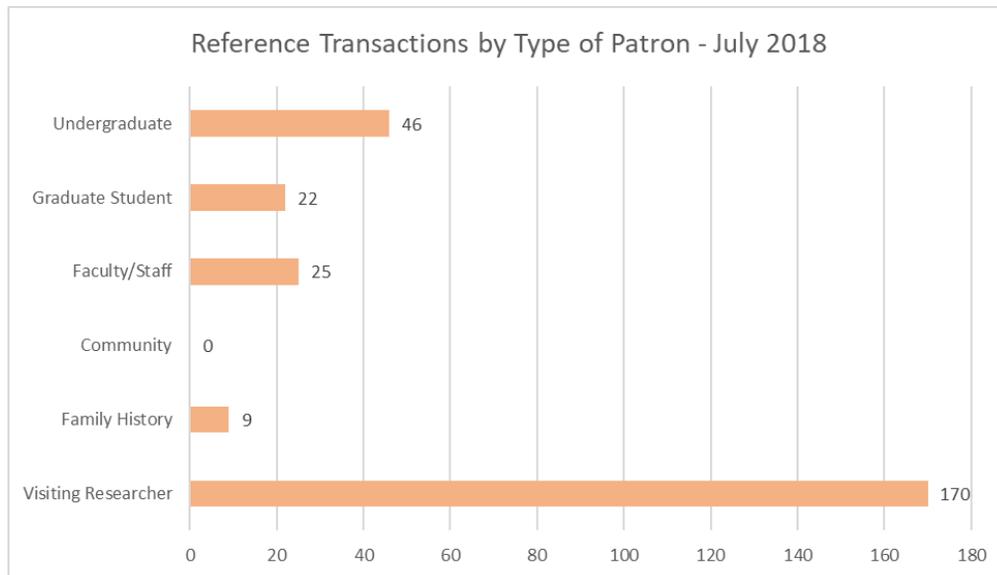




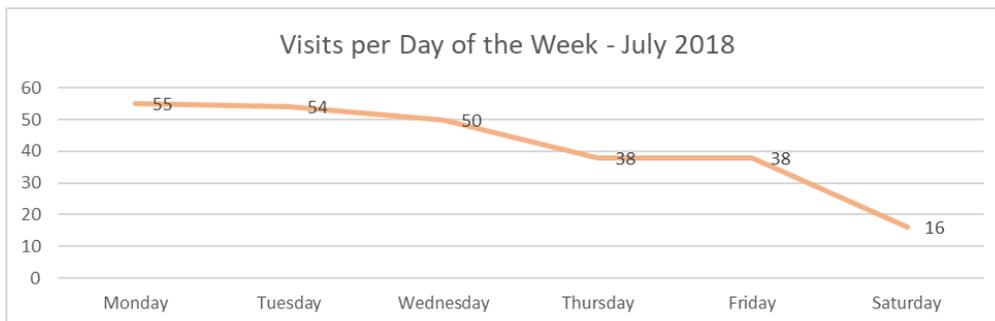
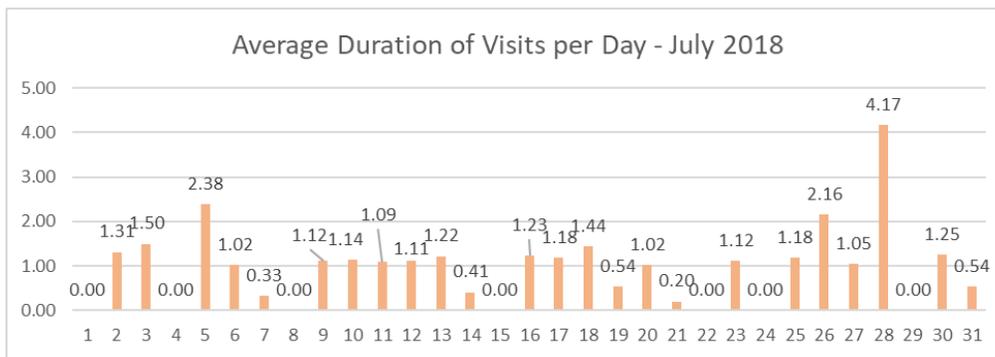
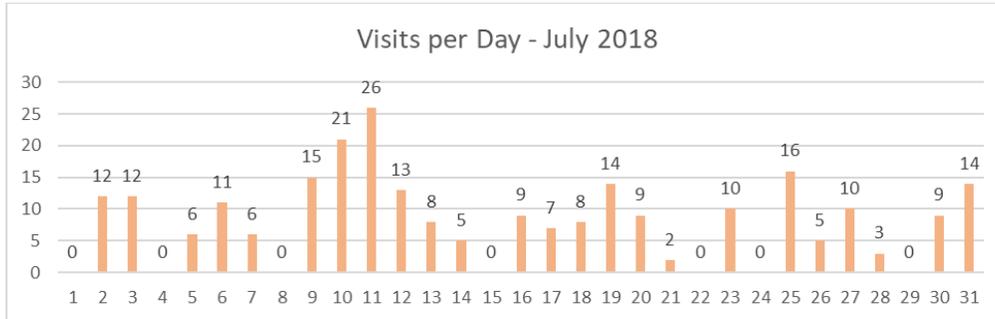
### Reference Transactions

Total transactions = 272



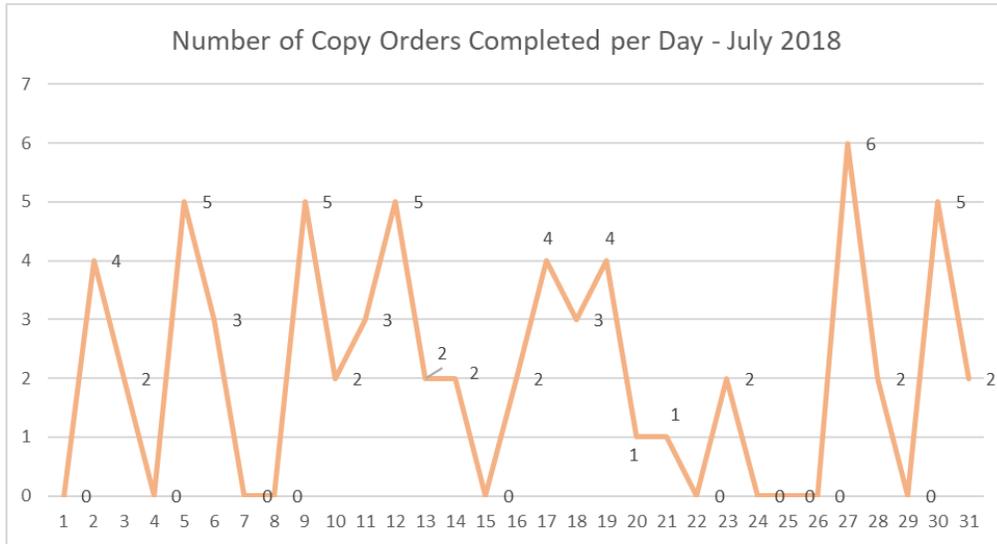


### Reading Room Use

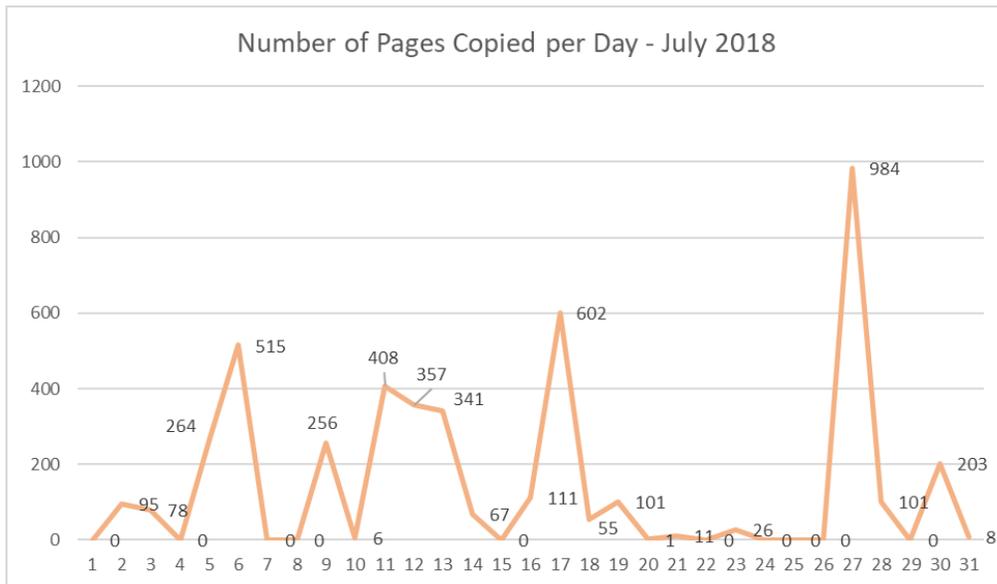


### Copy Orders

Total orders = 65



Total pages = 4,590



Average number of pages copied per day = 148.06

### Circulation: Number of Check-Outs per Day

Total number of check-outs: 3,422

Average number of check-outs per day: 110.39

