Notes from Second Statistics task Force Meeting

April 26, 2013

Present: Honore Bray, Stacy Bruhn, Wendy Campbell, Tracy Cook, Kim Crowley, Desiree Dramstad, Michelle Fenger, Colleen Hamer, Sarah McHugh, Jodi Oberweiser, Dee Ann Redman

Welcome and Introductions: Sarah welcomed everyone and introduced Colleen Hamer--new staff.

Goals: Sarah reviewed the goals of the task force.

Discussion Topic One: Current State Library calculations for our identified list of "problematic statistics"
Tracy opened the discussion from the list of problematic statistics.

Expenditures

Tracy asked, Which expenditures should be discussed?

Kim indicated her biggest concern is that everybody is making sure that the expenditures and revenue match ; e.g. at her library benefits are not paid out of her operating budgets, from general county fund … therefore they're not in expenditures and not in statistics; DeeAnn thinks that the benefits should be represented no matter the revenue source (she is also County supported for benefits).

Honore: says county has all expenses broken down as per list no problem for her reporting.

DeeAnn indicated they can also easily get from financial system.

Tracy says others have reported that finding the benefits in accounting is most difficult but that generally most understand the definition.

No one added further issues.

Jodi, not sure she is comparing apples to apples …

Tracy confirms that other directors have been concerned about how others are reporting as compared to themselves and also comparing their own stats year to year.

Honore, says that there used to be budget training. Stacy agreed that there is a need to communicate with local accounting staff on budget and definitions for PLS.

A point was made that it seems it should be important to have expenditures and revenue match.. so that comparisons can be valid.

Michelle Fenger points out that some libraries pay for MTlib2go should those be expenditures? It seems so.

Takeaway: This is a training issue. It was suggested that a webinar be put on near the collection date so MSL staff can outline and assist problem areas. Research after the meeting: Excerpt from Federal Revised Definition: Significant costs, especially benefits and salaries, that are paid by other taxing agencies (government agencies with the authority to levy taxes) "on behalf of" the library may be included if the information is available to the reporting agency. Only such funds that are supported by expenditure documents (such as invoices, contracts, payroll records, etc.) at the point of disbursement should be included. Do not report the value of free items as expenditures.

TRANSACTIONS

Kim thinks these are the worst kind of statistics to collect … she didn't do these … she used previous years. Nobody asks directional questions any more.

Michelle agrees they're poor.

Honore struggled then came to consensus in her building .. our reference desk is busy busy busy .. they get reference questions… directional are to accounts desk staff… it's difficult because completing a tick mark is very unreliable. This sentiment was repeated several times.

Wendy says don't we collect for one week then multiply by 52? That's what the instruction is. To pick a typical week and count only during that week.

Takeaway: This is a training issue, specifically regarding define and train on method of collection and clarify definitions. Also, may recommend that 'Directional' and 'Procedural' collection be discontinued (no Federal mandate).

CIRCULATION

Tracy led discussion of 'Other' category. She asks,'Are new technologies missing?'

Kim we count books, and mtlib2go/

Honore – indicated counts from e-books are rising rapidly, mapping program – gives printed map (it's a paid database), e-video all are increasing.

Tracy brought up database usage ? Honore says 'yes' … because we pay for it and board wants statistics monthly.

Others do count for board but not for PLS (database use)

Kim says it's important to follow feds definition.

Dee Ann says if we have a database stat … that would take some clear definition work. Session, retrieval, etc.

Tracy points out the fed definition that says laptops for use outside the library … not in-house use then per fed def.

Then there's the issue of checked out to another library.. fed def. says do not include.

Lends to other libraries are counted as ILL not circulation.

Honore explains partner loans are put 'in transit' not as check out. ILL are subtracted from circ.

Sarah explains that Mike's statistics … ask that items owned by the library not be included that were on hold for patrons of that library .

Takeaway: Discussion revolved around perhaps adding a State collection item of database use. Clarification would be required regarding which databases? It was suggested to keep in mind/review the stats vendors produce like Heritage, ProQuest, EBSCO etc. Also, remember that automated library systems need to be mentioned as included/not included. This is also a training issue. . Wendy asks that when definitions discussed this should come up.

COMPUTER USE

Tracy led discussion with, 'How to count devices and wireless?'

Discussion indicated that some have 'session software' that tracks wireless use but some do not. Jodi indicated that the usage has degraded services so a password had to be added.

It seems the definition does not include wireless but this is unclear. Stacy indicated that SDCs have discussed this and it remains unclarified.

Takeaway: This is a training issue and some verification may be needed as to whether wireless is reported.

INTER-LIBRARY LOANS

Discussion produced questions: Should partner group loans be ILL? Are things double-counted as circulation and ILL? What is an 'autonomous' library? There was discussion on if the system/tool used could help, but, it was also said that the definition needs to be what is driving the reporting.

Takeaway: Some will provide inventory of how situations are handled. This is a training issue. Kim – includes everything from partners in ILL; but things checked out in library also circulation ..so thinks she is double-counting. This item should come in a definition discussion. Tracy will check with the PLS Work Group. Sarah also thought the definition of 'autonomous' should be discussed. Kim suggested the Shared Catalogue participants bring an inventory of how this is handled to their next meeting. Kim suggested that interlibrary laons no longer be collected at the federal level.

ELECTRONIC RESOURCES

Dee Ann – noted that the collection is divided nicely as opposed to the circulation.

Tracy said she doesn't get a lot of questions about collection.

Dee Ann – thinks database can be problematic … especially those that are not just a search but providesa service . Is HomeworkMT a database?

Honore indicated they count whatever there is a license for.

Takeaway: This is something for a definitions discussion. Perhaps "licensed subscription content and services".

STAFF

Categorizing staff and staff FTE.

Discussion revolved around where the staff position information was coming from. Some indicated inconsistencies in their reporting over years. Others use the Library Directory as a guide. Sarah let all know that a different method for this item will be employed in the future but that it will be reported by the libraries.

Takeaway: This is something for a definitions discussion. Stacy advised that ARM should be reviewed for relevant definitions/requirements for a librarian.

Items not covered, for next meeting:

Staff FTE- count all library FTE or just those that serve public

Materials-print, electronic, and serial and how to categorize them

Revenue-categorizing and collecting

Overall goal of improving accuracy on collecting and reporting the data.

Discussion Topic Two: Frequency of collecting and timing of collecting statistics was not discussed.

Sarah indicated she would Doodle poll to schedule a follow-up meeting to complete the agenda during a meeting before the May scheduled meeting. The meeting adjourned at 3 p.m.