



**INTERNATIONAL FEDERATION OF LIBRARIES
ASSOCIATIONS AND INSTITUTIONS**

**STATISTICS AND
EVALUATION SECTION**

NEWSLETTER

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STATISTICS SECTION

SCOPE STATEMENT: The Section aims to promote the use of measurement and evaluation in the management, operation and promotion of libraries and library services. It advocates the use of both quantitative and qualitative statistical and other methods and tools to achieve this.

It promotes the development and use of standardized measures and good practice. It aims to co-operate with, to assist and to advise other IFLA sections in the use of measurement and evaluation in their fields.

It takes an interest in international benchmark comparisons and supports collaboration with international agencies such as UNESCO and ISO.

MEMBERSHIP: The Section now has a membership of 75.

The Standing Committee has 19 members (one corresponding). They are:

Valerie Alonzo (Bureau of Libraries of the city of Paris, France),
Melita Ambrozic (National and University Library of Slovenia),
Javier Alvarez Garcia (Library of Andalucia, Spain),
Cecile Arnaud (Bibliotheque Mazarine, Paris, France),
Henrik Aslund (Royal Library of Sweden),
Wanda Dole (Washburn University, USA),
Bjorg Glesne (Statistics Norway),
Michael Heaney (University of Oxford, UK),
Ellen Hoffmann (York University, Canada),
Marie-Dominique Heusse (University of Toulouse, France),
Ludmila Kozlova (Russian State Library),
Keith Curry Lance (Library Research Service, Colorado State Library and
University of Denver, USA),
Boris Lensky (Russian Book Chamber),
Pierre Meunier (Public Library of Montreal, Canada),
Pierre-Yves Renard (Ministry of Education, France),
Roswitha Poll (University and Regional Library Muenster, Germany),
Pauline Rothstein (Ramapo College of New Jersey, USA),
Yakov Shraiberg (Russian National Library of Science and Technology)

Corresponding member: Lic. Isabel Portales (Biblioteca Arca de Papel del Instituto Cubano del Libro, Cuba)

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MEETINGS:

The Standing Committee of the Statistics Section met on August 17th and 23rd during the Glasgow conference. Standing Committee members and guests reported on their activities and discussed plans for future conferences.

Roswitha Poll reported on the national benchmarking project in Germany conducted by Bertelsmann. The University of Muenster has produced a handbook in German on Balanced Scorecard. The Cost Accounting Handbook for Academic Libraries (final results presented at Copenhagen IFLA, 1997) has been translated into English and is being published by Saur. The German national statistics for 2002 are being collected using new statistics based on ISO 2789.

Marie-Dominique Heusse (University of Toulouse) reported that on a project for French national statistics for 2000 published two weeks ago. For the first time there was benchmarking of academic libraries by type and subject. Cecile Arnaud said that the French translation team is translating ISO 20983. She also reported that there is team working at the national level on collecting data on electronic resources. Valerie Alonso described a small project to collect statistics online for Paris city libraries and to post them online. In Paris there is a group working on gathering statistics of all types of libraries. There is a big change in administration of Paris public libraries. In the past the public libraries were administered by a central authority, now they will report to the boroughs.

Julia Blixrud reported briefly on the Association of Research Libraries (ARL) measurement and statistics program. The ARL statistics for large academic research libraries are published in paper form and also posted on the Web (<http://www.arl.org>). She described ARL's New Measures Initiatives, which include the LibQUAL+ pilot project to measure user perception of library service and the E-metrics project. The proceedings of the 4th International Northumbria Conference on Performance Measures have been published and are available from ARL. Beverly Lynch spoke about the NISO standard for library statistics (posted at <http://www.niso.org>) and urged librarians to review them and send comments. Joan Stein reported on ARL's Service Quality Academy, which provided a weeklong intensive training in quantitative and qualitative techniques.

Yakov Shraiberg (Russian National Public Library of Science and Technology) described his project collecting Russian Web sites; in the fall the lists will be available in English at the ILIAC Web site (<http://www.iliac.org>). The Russian National Library for Science and

Technology is setting up a “Server for Intellectual Statistics” on which statistics from the library will be posted daily. The server also houses centralized statistics for Moscow public libraries and the union catalogs. Boris Lensky described the work of the Russian Book Chamber is collecting the book trade statistics and administering the legal deposit system. When the Book Chamber was founded 85 years ago in 1917, its first task was the control of the fulfillment of legal deposit of books and newspapers.

Bjorg Glesne reported that for the first time Norway gathered statistics according to the new ISO standard. They are trying to get useful statistics on electronic resources, but have encountered problems with statistics furnished by publishers. There is a movement to link performance standards with statistics. A new organization for the co-ordination and development of libraries in Norway is being created under the authority of the Ministry of Culture and Church Affairs, and will be fully operative from January 1, 2003. The major statistics-collecting bodies, RBT and the Norwegian Directorate for Public Libraries, will be incorporated in this organization.

Henrik Aslund reported that the National Library of Sweden collects statistics only for research libraries. They began using the new ISO standard a year later than Norway. They are developing a new electronic form for gathering statistics. The Swedish Library Association is conducting a three-year evaluation project in which 53 libraries are testing a handbook on performance indicators. The results will be published on the Web. The handbook is available in Swedish at the Web site of the Swedish Library Association.

Ralph Manning (National Library of Canada) reported that Canada has not compiled comprehensive national library statistics for the last 12 years. About five years ago the National Library of Canada tried to make up for this by setting up a system in which each province and territory collects public library statistics and the Association of Research Libraries collects university library statistics. There has been no mechanism to collect special library and school/children’s library statistics. Three years ago there was a project to collect comprehensive statistics. Ralph is beginning a project to collect Web sites for provincial, etc., online this fall.

Ellen Hoffmann reported on the evaluation of the Canadian National Site Licensing Project, a license for 64 universities to over 700 e-journals. They are building a database on use data and have found that outcome measures are the most difficult to define. They are hiring a consultant to conduct interviews with researchers on information seeking for their research.

Pierre Meunier reported on the reorganization of the Montreal public libraries and on the progress of the working group devoted to developing, for Montreal, a minimum standard for libraries and performance measures.

Javier Garcia Alvarez reported that Andalucia is creating a network to connect all public libraries in the region. They are working to create a map of needs and resources in the 8 provinces and are conducting a survey of users in all libraries. They are also negotiating with a commercial provider to collect the quantitative measures and also some qualitative information.

Mike Heaney reported the UK library association CILIP is responding to an unfortunate government action to give efficiency scores to all local government services. As opposed to other government services, libraries are given only half a score: CILIP is protesting this.

There have been several important LISU publications including a recent survey on school libraries and libraries for children. The higher education statistics collected by SCOUNL for the first time this year include not only university library statistics, but also college library statistics. The SCOUNL statistics can be filled out a spreadsheet available online and submitted online. The spreadsheet has a mechanism to identify errors as the data is being entered. SCOUNL is investigating LibQUAL+. Oxford has been trying to apply an activity-based costing model (developed by a consultant) to library operations.

PLANS FOR IFLA 2003 AND 2004

BERLIN, 2003. The Statistics section will join with Library Theory and Research to sponsor the 5th Northumbria Conference as an IFLA preconference satellite meeting in Durham City, UK. Information on the preconference is available from Sandra Parker at the University of Northumbria at Newcastle (Sandra.parker@unn.ac.uk). The Management and Marketing Section has asked the Statistics Section to co-sponsor a post-conference satellite meeting in Vienna, 10-12 August, on “Leadership and Risk Taking in Library Management: Performance Measurement and Statistics in Library Management.” Wanda Dole reported that the National Libraries Section has asked the Statistics Section to join in presenting a program on Benchmarking in Berlin. Each Section will invite two speakers. National Libraries speakers will include a presentation on a benchmarking project of national libraries that will be completed in early 2003; possible Statistics speakers include Petra Klug of Bertlesmann. The Statistics Section’s Open Session will have the topic “Cost Analysis Data”; Roswitha Poll will take responsibility for this.

BUENOS AIRES, 2004. The Section will collaborate with the Public Libraries Section to present a program on using statistics for advocacy for public libraries. Possible subtopics include the ISO standard, sharing of experiences, the effect of changing demographics, and justifying the work of public libraries. Standing Committee members Valerie Alonzo (Bureau of Libraries, City of Paris), Pierre Meunier (Montreal Public Libraries) and Javier Alvarez (Library of Andalucia) will work with members of the Public Library Section to plan this program.

Current Projects

1. Newsletter. Two issues of the Section Newsletter were published in paper and electronic form last year. The electronic version is posted on the Statistics page at the IFLA Web site, IFLANET <http://www.ifla.org>
2. Redefinition of the scope and name of the Section. A working group was created to implement Strategic Plan Action Item 5.1. (redefine scope of the Section). Mike Heaney (Oxford University) convened the group which suggested that the name be changed to “Statistics and Evaluation Section” and Scope enlarged to include measurement and evaluation. Heaney shared the revisions with the Sections of Management and Marketing, Library Theory and Research, University Libraries and Acquisitions and Collection Development. None of these Sections raised objections to the revisions. The revisions have been sent to the IFLA Professional Committee for approval.
3. Brochure. The brochure will be revised and translated into all the official

languages this year. Section member Ellen Hoffman is revising the English version to reflect changes in the Scope and name of the Section.

4. Identification of qualitative measures. A working group was created to implement Strategic Plan Action Item 2.1. (identify qualitative measures). Roswitha Poll (University of Muenster), the convener of the group, reported that the group will work by e-mail and post developments on the Web page of her library (<http://www.uni-muenster.de/ULB/outcome/index.html>) with a link from Section's Web page on IFLANET.
5. Melita Ambrozic (National Library of Slovenia) prepared a Webography of statistics Web sites that is posted on the Statistics page at IFLANET (www.ifla.org)

CONFERENCE PROGRAMS:

NORTHUMBRIA LITE WORKSHOP, 22 AUGUST 2002

Together with the Library Theory and Research Section, Statistics joined with the editorial board of the Northumbria conference to present a one-day workshop ("Northumbria Lite") on outcomes measures. The presentations from the workshop will be published in *Performance Measures and Metrics*. More than 50 delegates attended the workshop.

RELATIONSHIPS WITH OTHER BODIES: The Section cooperates with other IFLA groups interested in the use of statistics and performance measures as tools for management and change in libraries. These IFLA groups include the following Sections: Management and Marketing, Library Theory and Research, University Libraries, National Libraries and Acquisitions and Collection Development. The Statistics Section also works with other library organizations and bodies such as the Northumbria Conference on Performance Measures, LISU, and ARL. The Section has sponsored the Performance Measures in Public Libraries Discussion Group, which concluded its tenure at the 2002 Glasgow Conference.

OTHER EVENTS :

PRECONFERENCE SATELLITE MEETING, 13-15 AUGUST 2002

Statistics Section members Cecile Arnaud (University of Paris 10), Ellen Hoffman (York University) and Wanda Dole reported on the preconference "Statistics in Practice" (Loughborough, 13-15 August). A description of the conference is available at LISU (Library and Information Statistics Unit) Web site: <http://www.lisu.ac.uk>. The abstracts and PowerPoint presentations are posted at <http://www.lboro.ac.uk/departments/dis/lisu/ifla-follow.html>. LISU will publish the proceedings. The Statistics Section and the Library Theory and Research Section were the IFLA sponsors for the event. Thirty-eight (38) delegates from 13 countries attended. The preconference was the result of a 1999-2000 IFLA project for the sections of Statistics and Management and Marketing. Patricia Layzell Ward conducted a survey on training about statistics and management and marketing offered in schools of library and information science. The survey confirmed Statistics Section members' perception that there is little or no training in statistics and the practical application of statistics

Wanda V. Dole / October 2002

Revised Scope of the Statistics Section

1. Name

Rename ' Statistics and Evaluation Section'

2. Scope

The Section aims to promote the use of measurement and evaluation in the management, operation and promotion of libraries and library services. It advocates the use of both quantitative and qualitative statistical and other methods and tools to achieve this.

It promotes the development and use of standardised measures and good practice. It aims to co-operate with, to assist and to advise other IFLA sections in the use of measurement and evaluation in their fields.

It takes an interest in international benchmark comparisons and supports collaboration with international agencies such as UNESCO and ISO.

3. Activity

The Section's field of interest includes:

Statistics of all kinds and their definition, standardisation, analysis and interpretation;

The collection and use of information about library use, users, materials, resources and processes;

Methods of data collection, including counting, aggregation, correlation, sampling, surveys and transaction logging;

Analysis, including specialised statistical techniques, user satisfaction assessment and the use of software packages;

Uses of such data and analyses in library management and planning, in performance measurement and benchmarking, in longitudinal studies ('time series') and impact studies

The publication of results in print and electronically.

Michael Heaney for the Working Group on the Scope of the Section, 18 August 2002

PROGRESS TOWARD GOALS OF IFLA STATISTICS SECTION

Strategic Plan, 2001-2003

Mission

The Section aims to promote the collection and use of statistics and performance indicators both for the successful management and operation of libraries and for the demonstration of the value of libraries to their users, parent institutions and funding agencies.

Goals

1. Promote the use of statistics and performance measures as tools for management and change in libraries.

(Professional priorities: (a) Supporting the role of libraries in society; (h) Developing library professionals; (i) Promoting standards, guidelines and best practice)

Actions

- 1.1 Hold meetings, workshops and Open Sessions at IFLA conferences promoting the use of statistics and performance measures.
STATUS: on-going
- 1.2 Encourage schools of library and information science to include instruction in the use and interpretation of statistics, performance measures, etc.
STATUS: on-going. Contact made with LISU and Loughborough University, Aug. 2002
- 1.3 Publicize case studies utilizing statistics to improve the management of libraries on IFLANET and in the Statistics Section Newsletter and other IFLA publications.
STATUS: deferred
- 1.4 Create a list of Web sites for national statistics; post and maintain it on the Statistics page on IFLANET.
STATUS: completed 2002
- 1.5 Continue to cooperate with other IFLA groups and others involved in the study of Performance Measures.
STATUS: on-going. Cooperated with Library Research and Theory Section to present pre-conference "Statistics in Practice" and Northumbria Lite workshop at Glasgow IFLA, 2002. Cooperating with National Libraries Section to present a program on Benchmarking at IFLA 2003. Cooperating with LRT to present 5th Northumbria Conference as a pre-conference satellite meeting and with Management and Marketing to present "Leadership and Risk taking in Library Management: Performance Measurement and Statistics in Library Management" as a post-conference satellite meeting in 2003.

- 1.6 Work with other IFLA groups, library associations, and relevant bodies (LISU, Northumbria Conference, ARL, etc.) to develop workshops and projects.
STATUS: on-going. See 1.5 above. Discussion with LISU and ARL re developing list of core competencies and training modules for Statistics in Practice.
- 1.7 Work with ISO, UNESCO and other organizations to promote the development and use of recognized standards for benchmarking and comparative analysis.
STATUS: on-going
- 1.8 Liaise with the International Standards Organization (ISO) and other standards organizations over the revision of standards for library statistics.
STATUS: on-going

2. Promote the use of qualitative as well as quantitative data.

(Professional priorities: (a) Supporting the role of libraries in society; (h) Developing library professionals; (i) Promoting standards, guidelines and best practice)

Actions

- 2.1 Create a working group to identify qualitative indicators and measures, possibly in collaboration with LIS educators or other IFLA groups or with professional bodies outside the sector.
STATUS: created summer 2002

3. Promote the use of and provide training in Best Practices in all aspects of statistical work.

(Professional priorities: (a) Supporting the role of libraries in society; (h) Developing library professionals; (i) Promoting standards, guidelines and best practice)

Actions

- 3.1 Hold meetings, workshops and Open Sessions at IFLA conferences promoting the use of Best Practices.
STATUS: on-going
- 3.2 Publicize projects utilizing Best Practices to improve the management of libraries on IFLANET and in IFLA publications.
STATUS: on-going
- 3.3 Work with other IFLA groups, library associations, and other relevant bodies (LISU, Northumbria Conference, ARL, etc.) to develop workshops and projects based on Best Practices.
STATUS: on-going

- 3.4 Work with ISO, UNESCO and other organizations to promote the development and use of recognized standards for performance indicators and measures.
STATUS: on-going

4. Provide training in the application of Performance Indicators and Measures (impact, outcome, assessment, results).

(Professional priorities: (h) Developing library professionals; (i) Promoting standards, guidelines and best practice)

Actions

- 4.1 Hold meetings, workshops and Open Sessions at IFLA conferences promoting the use of performance indicators and measures.
STATUS: on-going
- 4.2 Work with other IFLA groups, library associations, and other relevant bodies (LISU, Northumbria Conference, ARL, etc.) to develop workshops and projects based on performance indicators and measures.
STATUS: on-going

5. Redefine the scope of the Section on Statistics to reflect the range of analytical tools and techniques now available for managing and assessing libraries and library services.

(Professional priorities: (a) Supporting the role of libraries in society; (h) Developing library professionals)

Actions

- 5.1 Create a working group to explore definition of the scope, in consultation with other relevant IFLA groups, and in accordance with IFLA's Professional Priorities.
STATUS: completed August 2002