

# SAA RAO | Measures and Metrics for Public Services Tools Survey GUIDE

## INTRODUCTION/DESCRIPTION

The Assessment of Measures and Metrics for Public Services (AMMPS) Sub-Committee of the Reference, Access, and Outreach Section (RAO) of the Society of American Archivists (SAA) is conducting a survey of academic, governmental, corporate, and public archives, libraries, museums, historical societies, and other institutions utilizing the *2018 Standardized Measures and Metrics for Public Services in Archival Repositories and Special Collections Libraries*.

The purpose of the survey is to gather information about which measures are being collected or not collected, which metrics are in use, and the types of data collection tools or systems institutions are using to implement the *Standards*. The survey also seeks to gather information related to the readiness of institutions to contribute data to a national survey of comparative measures and metrics, as well as training needs. The results will be used to determine how to best support the ongoing implementation of the *2018 Standardized Measures and Metrics for Public Services in Archival Repositories and Special Collections Libraries* and to improve outreach, training opportunities, and advocacy around the *Standards*. This survey has received an IRB determination and has been designated as non-human subject research.

Two [editable survey guides](#) are available in [Word](#) and [Excel](#), in order to assist with compiling the necessary information from your institution before completing this survey.

## SURVEY DEMOGRAPHIC QUESTIONS

- Type of Institution:  
(listed alphabetically by default)
  - Academic institution
  - Corporate library/archives
  - Governmental institution
  - Independent research library/archives
  - Public library/archives
  - Museum
  - Religious order library/archives
  - Other, please list: [short answer]
- Total number of special collections or archives staff:
  - 1 - 5 FTE
  - 6 - 10 FTE
  - 11 - 20 FTE
  - 21 - 30 FTE
  - 31 - 40 FTE
  - 41+ FTE
- Institution name (optional, will not be shared publicly): [short answer]
- If a national survey were administered to collect and compare data for the standardized measures and metrics, would your institution be ready to submit data for any of the following time frames:
  - Fiscal Year 2019
  - Calendar Year 2019
  - Fiscal Year 2020
  - Calendar Year 2020
  - Fiscal Year 2021
  - Calendar Year 2021
- Which of the following topics would be of interest for potential training, seminars, or webinars?
  - Data collecting/gathering techniques
  - Data collecting/gathering tools
  - Data analysis techniques
  - Data visualization
  - Short-term program assessment
  - Long-term program assessment
  - Continuous improvement planning
  - Using data for advocacy
  - Other, please list/describe: [short answer]

# SURVEY OF DOMAINS SECTIONS

## 1.0 USER DEMOGRAPHICS

### 1.1 Basic measure (“User Association”)

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

### 1.2 Advanced measure (“User Affiliation”)

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

### 1.3 Advanced measure (“Registered Users”)

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

### 1.4 Recommended metrics

Are you planning to utilize any of the recommended metrics?:

(Choose all that apply)

- “Internal” vs. “External” Users
- Users by Affiliation
- Users by Geographic Location
- Unique Users by month/year
- Newly Registered Users by month/year
- Returning Users by month/year

## 2.0 REFERENCE TRANSACTIONS

### 2.1 Basic measure ("Reference Questions")

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

### 2.2 Advanced measure ("Question Method")

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

### 2.3 Advanced measure ("Time Spent Responding")

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

### 2.4 Advanced measure ("Question Purpose")

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

### 2.5 Advanced measure ("Question Complexity")

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

### 2.6 Recommended metrics

Are you planning to utilize any of the recommended metrics?:

(Choose all that apply)

- Total number of Reference Questions received per week/month/year
- Total number of Reference Questions received per week/month/year via each method
- Average number of minutes spent responding to Reference Questions
- Average number of minutes spent responding to internal vs. external users
- Ratio of time spent responding to Reference Questions to time Users spend in the Reading Room
- Ratio of Reference Questions submitted by each User demographic category

### 3.0 READING ROOM VISITS

#### 3.1 Basic measure (“User Days”)

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

#### 3.2 Advanced measure (“User Hours”)

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

#### 3.3 Recommended metrics

Are you planning to utilize any of the recommended metrics?:  
(Choose all that apply)

- Total Reading Room Visits per day
- Average number of Reading Room Visits per day
- Average number of Reading Room Visits per unique Registered User
- Total User Hours per day
- Average Reading Room Visit Length

## 4.0 COLLECTION USE

### 4.1 Basic measure ("All Checkouts")

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

### 4.2 Advanced measure ("Reading Room Use")

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

### 4.3 Advanced measure ("Usage Hours")

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

### 4.4 Advanced measure ("Reference Use")

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

### 4.5 Advanced measure ("Exhibition Use")

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

### 4.6 Advanced measure ("Instructional Use")

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

4.7 Advanced measure (“Operational Use”)

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

4.8 Advanced measure (“Purpose of Use”)

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

4.9 Advanced measure (“Publication Use”)

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

4.10 Advanced measure (“Reproduction Requests”)

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

4.11 Advanced measure (“Reproductions Made”)

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

4.12 Advanced measure (“Interlibrary Loan Requests Received”)

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

#### 4.13 Advanced measure (“Interlibrary Loan Requests Filled”)

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

#### 4.14 Recommended metrics

Are you planning to utilize any of the recommended metrics?:

(Choose all that apply)

- Total Collection Units checked out per day/week/month/year
- Average number of Collection Units checked out per day/week/month/year
- Total Usage Hours per day
- Average use time per Collection Unit
- Total number of times unique Collection Units are consulted
- Ratio of unique Users per Collection Unit
- Ratio of Reproduction Requests to Reading Room visits
- Total Reproductions per day/week/month/year
- Average number of Reproductions per day/week/month/year
- Average number of Reproductions per User
- Total number of Interlibrary Loan Requests received or filled per day/week/month/year
- Ratio of Interlibrary Loan Requests filled to received

## 5.0 EVENTS

### 5.1 Basic measure (“Number of Events”)

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

### 5.2 Advanced measure (“Event Attendees”)

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

### 5.3 Advanced measure (“Length of Event”)

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

### 5.4 Advanced measure (“Type of Event”)

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

### 5.5 Advanced measure (“Event Preparation Time”)

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

### 5.6 Recommended metrics

Are you planning to utilize any of the recommended metrics?:

(Choose all that apply)

- Total Events per month/year
- Average number of Events per month/year
- Average number of attendees per Event
- Average preparation time per Event
- Preparation time per attendee



## 6.0 INSTRUCTION

### 6.1 Basic measure (“Number of Instruction Sessions”)

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

### 6.2 Advanced measure (“Number of Students”)

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

### 6.3 Advanced measure (“Instructional Level of Students”)

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

### 6.4 Advanced measure (“Instruction Session Duration”)

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

### 6.5 Advanced measure (“Instruction Session Preparation Time”)

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

### 6.6 Recommended metrics

Are you planning to utilize any of the recommended metrics?:

(Choose all that apply)

- Total Instruction Sessions per week/month/year
- Average number of Instruction Sessions per week/month/year
- Average number of Collection Units used per Instruction Session
- Average number of students per Instruction Session
- Average preparation time per Instruction Session
- Average preparation time per student

## 7.0 EXHIBITIONS

### 7.1 Basic measure (“Number of Exhibitions”)

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

### 7.2 Advanced measure (“Exhibition Visitors”)

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

### 7.3 Advanced measure (“Exhibition Types”)

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

### 7.4 Advanced measure (“Exhibition Duration”)

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

### 7.5 Advanced measure (“Exhibition Preparation Time”)

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

### 7.6 Advanced measure (“Exhibition Publications”)

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

7.7 Advanced measure (“Exhibition Promotions”)

- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

7.8 Recommended metrics

Are you planning to utilize any of the recommended metrics?:

(Choose all that apply)

- Total number of Exhibitions per year or other relevant time period
- Total Exhibit visitors per year
- Total visits per Exhibition
- Average number of Exhibit visitors per month/year
- Average number of visitors per Exhibition
- Average number of visitors per hour

## 8.0 ONLINE INTERACTIONS

### 8.1 Basic measure ("Page Views")

- Google Analytics
- Other web analytics service:  
[short answer]
- Web server log files
- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

### 8.2 Advanced measure ("Unique Page Views")

- Google Analytics
- Other web analytics service:  
[short answer]
- Web server log files
- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

### 8.3 Advanced measure ("Sessions")

- Google Analytics
- Other web analytics service:  
[short answer]
- Web server log files
- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

### 8.4 Advanced measure ("Session Duration")

- Google Analytics
- Other web analytics service:  
[short answer]
- Web server log files
- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

8.5 Advanced measure (“Downloads”)

- Google Analytics
- Other web analytics service:  
[short answer]
- Web server log files
- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

8.6 Advanced measure (“Download File Type”)

- Google Analytics
- Other web analytics service:  
[short answer]
- Web server log files
- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

8.7 Advanced measure (“Traffic Source”)

- Google Analytics
- Other web analytics service:  
[short answer]
- Web server log files
- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

8.8 Advanced measure (“Social Media Reach”)

- Google Analytics
- Other web analytics service:  
[short answer]
- Web server log files
- Not Collecting
- Aleph
- Aeon
- Alma/Primo
- ArchivesSpace
- Drupal
- Excel
- Gimlet
- Google Form
- LibAnswers
- LibInsight
- Paper form or tick sheet
- PastPerfect
- Sierra
- Voyager
- Other, please explain:  
[short answer]

8.9 Recommended metrics

Are you planning to utilize any of the recommended metrics?:

(Choose all that apply)

- Total Page Views per day/week/month/year
- Total session per day/week/month/year
- Total session duration per day/week/month/year
- Average session duration per day/week/month/year
- Page Views per session
- Total file downloads per day/week/month/year

## **FINAL QUESTION**

Any comments or questions for the sub-committee?:  
[long answer]

## **SUBMIT**

[End of Survey]