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Through the Gateway: Reporting on Collections

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Presenters

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Recorder

Librarians are frequently required to support collection and broader management decisions. Line staff and managers need clear and complete data that can be easily accessed and manipulated in order to understand current and historic situations and trends. Presentation of that data must be visually compelling and easily used to support reporting to administrators, funders, and accrediting bodies. The presenters discussed the reports development process, the need for dialogue amongst stakeholders not only to retrieve useful data but also to analyze it, and provided examples of a variety of collections-related reports.

KEYWORDS collections, statistics, collection development, reporting tools

Administrators demand more data, more frequently, to justify the use of increasingly limited resources. This presentation centered on the tools librarians use to collect data, what vendors hear from their customers and what they can provide, and the iterative processes and collaborative efforts needed amongst all the stakeholders in order to secure good data about collections' usage and costs.

Feick and Hurd opened the presentation describing every librarian's nightmare. Though our systems are bursting with data, the *do-more-with-less* era hinders the ability to dissect it in meaningful ways. Instead, requests for reports are often dealt with in crisis mode. The scenario: the budget is being cut, senior staff are retiring, and the library director is moving on. There's been no passing of the corporate memory and in thirty days the provost wants a report describing historic and current trends regarding expenditures and usage of the collection. The librarian brainstorms with co-workers to identify answers for questions such as what information is needed, where is it located, and how is it retrieved. Internal systems may provide some data. Other data may be available through the vendors with whom the library works.

Hurd and Feick provided background on reports development from the perspective of the system vendor and the subscription agent. Like the librarian, systems vendors turn to colleagues for internal discussion and brainstorming, but expand to market analyses and the use of focus groups as well as informal conversations with customers. Creating a new product requires knowing what the customer needs, determining a business case, and marketing: is this a one-time customization, a standard report, an addition to an existing report? Initial programming follows those discussions and development partners and beta sites are identified. The same iterative process occurs for subscription agents who might receive a Request for Proposal (RFP) or requests for a new report from customers. Librarians spur healthy competition when they inform agent X that agent Y provides report Z. Competition provides opportunity for the agent to work

internally and externally to enhance their operations. It also drives the development of standards. However, despite those standards, each and every new request requires customization to meet the specific needs of the customer.

Both Hurd and Feick agreed that these processes happen much faster than in the old days because data gathering is easier and faster. In the past, the discussion took place in what the presenters described as the infamous triangle talk: librarian to agent to publisher to agent then back to librarian.

Nowadays, the publisher role has been replaced by that of content provider. This might be a publisher, an aggregator, or a shared system. The agent or intermediary now includes an agent, a jobber, a consortium, and/or a shared system. The triangle has become a Venn diagram because so much more data is shared. The intersection in the Venn diagram is where the cooperation between library, intermediaries and content providers occurs.

The data needed by librarians are in silos - in our integrated library systems (ILSs), our Electronic Resource Management Systems (ERMs), and on vendor or aggregator websites. Pulling that information together is critical to understanding what is happening “behind the curtain” according to presenter Smith. Reports allow us to peek under the rug, a necessary step towards the summary presented to an administrator. Reports expose our data, which every librarian knows are only as good as that data that were entered. Be prepared for clean-up work which goes hand-in-hand with reports, and do not be shy about asking how your vendor might be part of that process. Consideration must be given to the type of reports needed and the timeline for delivery. Formulating clear goals aids the definition of the statistics needed and whether internal or external help will be required. Scenarios may be run past the vendor. Information, including additional data, might be readily available from them. Smith encouraged providing feedback to the vendor in order to enhance the process.

Feick continued the discussion by providing the philosophy of reporting: give the customer lots of data, standard reports that include numerous columns with filters which can be hidden or manipulated as needed. Detailed reports exist for both subscription and collection management, from holdings lists and claims to subject analysis and usage statistics. Hurd noted that vendors are creating robust data stores with statistical reporting tools, which can provide libraries with trend analyses and increasingly important transactional data. She described the benefits of Innovative Interfaces, Inc. reporter tool. With a few clicks, reports can be generated on a web browser from data in the Millennium integrated library system, providing accurate, next-day reporting.

Smith provided background information on the American University Washington College of Law (WCL), where his library serves approximately 1,800 students, to set the context for his own institution’s experience with Millennium’s Reporter tool. Reporter offers an additional perspective to data provided by other vendors, and gives the library staff an ability to look at long term trends and to compare data over time quickly and efficiently. Using Reporter and other tools such as Excel and Google analytics staff are able to analyze their collections’ usage and to provide data to support informed decisions for collection development.

Data debunks myths, allowing staff and users to match perceptions against reality. News about cutting collections is rarely received in a positive light. The library’s ability to show what is being used and by whom, presents real data to support those difficult conversations with faculty and students. Sharing data conveys transparency, reinforces decisions, and bolsters the rationale behind the allocation of resources. Usage analysis completed by Smith and his colleagues at WCL highlighted significant drops in print usage, and fostered work with

neighboring institutions on collaborative collection development to trim existing print collections. On a humorous side note, Smith mentioned that they discovered that headphones and laptop chargers circulated more than anything else. Smith encourages the regular review of reports data because anomalies can be identified and corrected early. He cautioned about automatically trusting your data. It is critical that results be validated. Careful review will ensure that data have been entered properly. He noted their own discovery of incorrectly coded patron data which skewed results. The more eyes on the data, the better, because every individual brings a unique perspective and historical knowledge. To that end, all staff at WCL have access to all datasets and the ability to use Reporter based on their work responsibilities.

Smith ended the presentation by reminding the audience that our ability to provide good data comes from a variety of sources: our own library systems - ILS, the ERM - and that data must be combined with information from both intermediaries and content providers. What is needed is a utility to exchange data amongst all the parties in order to create customized reports that meet the needs of the library. It is imperative that all interested stakeholders encourage content providers and vendors to adopt standards such as ONIX, for the easier exchange of information in the future.¹

The question and answer session was not so much about clarification of the information presented but rather a discussion that began with Smith's final slide, which asked the question, "What do you need?" Hurd and Feick reminded the attendees that when the library identifies a need, a report, or a product, being vocal and repetitive about it drives home the requirement for standards from content providers. Library voices blending with intermediaries' voices demonstrate that need. One member of the audience suggested that librarians need more shared information about how to present data to our users because being a sales person was not part of our job descriptions. Excel spreadsheets with hundreds of items are not sufficient. Skills to prepare an executive summary or the ability to do more with data visualization as another attendee proposed, are now necessary. Hurd suggested there might be a role for their trainers to support librarians in this arena.

The presentation wrapped with consensus on the increasing needs for reporting on collections. The librarian must understand where the data live and ensure its accuracy. In order to discover what is going on "behind the curtain," collaboration is required between librarian, intermediaries and content providers.

Notes

1.ONIX, <http://www.editeur.org/8/ONIX> (accessed December 1, 2011).

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