

Assessment Using Evidence: CARLI Voyager Reports

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This paper provides a brief framework to introduce Voyager Reports that allow for evidence-based assessment of individual library and CARLI-based services.



Voyager Reports

- ◎ **Phase I:** examination of 2 Voyager Reports as examples of readily available data for making evidence-based evaluation of services
- ◎ **Phase II:** description of other standard Reports, as well as those being used by some individual libraries, and coordinated development of new Reports to support collaborative initiatives

Phase I

Phase I will describe two standard Reports:

- **Circulation Stat 3**
 - Charges and renewals by patron type
- **Circulation Stat 1**
 - Charges and renewals by location code/name

Circulation Report 3 – Charges and Renewals by Patron Type

PATRON_GROUP_NAME	Charges	Renews
Academic Employee	13950	6812
Courtesy Card	2097	574
Elementary	8362	809
Emeritus Faculty/Staff	827	599
Faculty	32	1
Graduate Student	15189	5448
High School	1640	256
Inter Library Patron	710	147
ISU Alternative Programs	335	109
ISU Honors Undergrad (GA)	6924	1053
Library Staff	658	148
Lincoln Coll Student	57	
Support Staff	2696	1555
UnderGrad	66733	9723

UB patrons included in Report 3

○ PATRON_GROUP_NAME	Charges	Renews
ADL UBLong	7	15
ADL UBReg	109	216
ARU UBLong	25	35
ARU UBReg	60	74
AUG UBLong	88	282
AUG UBReg	178	171

Circulation Report 1

Sample report

LocationCode	LocationName	Charges	Renews
1-6shelf	FL1-6 Shelves	1	
2circ	FL2 Circulation Desk	20230	258
2desknc	FL2 Ref Desk Noncirc	3	
2media	FL2 Media	6423	218
2mform	FL2 Microforms Noncirc	4	
2refnc	FL2 Reference Noncirc	106	28
2res	FL2 Reserve Desk	5981	6
3ovshelf	FL3 Oversize Shelves	14	5
3shelf	FL3 Shelves	12034	8664
3shelfnc	FL3 Shelves Noncirc	4	
4desk	xFL4 4desk DO NOT USE		2
4ovshelf	FL4 Oversize Shelves	7	1
4ovshelfnc	FL4 Oversize Noncirc	1	
4shelf	FL4 Shelves	15746	12232

Phase 1

How are these Reports valuable?

Assessment of Voyager Reports could lead to more effective service plans in:

- collection development
- creating instructional material
- improving signage
- revising staffing patterns
- developing web-based resources

Phase 1

Possible follow-up actions to data assessment:

- Reconsider allocations of shelf space based on use
- Develop additional instruction/promotional materials to highlight specific locations, collections
- Target specific user groups for increased exposure to selected types of materials or locations
- Review high and low use materials to assist in revising collection budgets
- Compare print and e-book usage patterns

Phase II

Assessment of effectiveness based upon additional Voyager Reports

- Locally run Reports could be shared across CARLI libraries
- Future customized Reports and the questions they could answer
- Cooperative efforts that would benefit from group analysis

Phase II

Future customized reports could include:

- collection use breakdown by location, date, media type
- circ data of items in temporary locations (displays, new book shelves)
- merge elements from Circ1 and Circ3 to have use by patron types by location

Phase II

Cooperative Efforts & Group Analysis

- Analyze member libraries' net borrowing and lending patterns
- Assessment of data could reveal collection areas across the consortium that could be adjusted to provide better coverage of heavily used segments
- Streamline areas of lighter use
- Core collection areas requiring less immediate access could be divided among libraries to reduce duplication
- Designating in-depth areas to appropriate institutions could enrich the consortia collection
- Establish centers of excellence

Phase II

Cooperative efforts example:

German language materials – find strengths (language studies, art, aeronautical engineering) determine through collaboration how members may further focus their collection development

Confidentiality Concerns

Libraries must ensure the privacy of patron privacy when using systems data to explore usage. No individual identifying information should be revealed in the statistics and reports that are generated using data from Voyager. Professional standards, consortium policies, and state and federal guidelines provide the following guidance:

ALA's Policy Concerning Confidentiality of Personally Identifiable Information about Library Users specifies that records of individual usage should be kept private.

CARLI Privacy Policy does not support the retention of personal information beyond what is minimally necessary. We also need to be aware that aggregate statistics may be problematic in cases of small populations, which may allow for identifying individual user patterns.

Patron record confidentiality is protected by law in forty-eight states. The Illinois Library Records Confidentiality Act protects the privacy of patron registration and circulation records. This privacy protection does not prohibit the collection of statistics as long as those statistics contain no identifying information. In addition federal laws must be considered.

UPDATE

- A new CARLI task force has been established to review the needs for student data and to establish a process that will ensure appropriate privacy.
- “A Good, Dumb Way to Learn from Libraries” (Chronicle of Higher Ed blog, 10/7/14)

Possible Next Steps:

- Proactively gather local Reports through various methods, such as CARLI liaison outreach efforts
- Review these materials and add significant Reports to the CARLI website
- Develop organized conversations on collaborative efforts that could utilize the gathered Reports
- Develop organized conversations on possible collaborate efforts that would require new Reports and document the desired elements