Assessment and Statistics Committee
Final Annual Report for 2009

This has been a particularly interesting, busy and productive year for our Committee, with the completion of a comprehensive reassessment of the Annual Statistics and a revision of the core Annual Statistics survey based on that assessment. The Committee met once this past year at the Association annual meeting in conjunction with the AAMC meeting in San Antonio in November 2008. This report describes Committee activities in each of the following areas: 1) The completion of the 31st Edition Annual Statistics surveys; 2) The comprehensive membership assessment of the Annual Statistics surveys completed in February 2009, and the subsequent major revisions to the core survey completed by the Committee in spring 2009; 3) The status of the current 32nd Edition Annual Statistics surveys; 4) The enhancements to the Web Portal tools and capabilities completed and projected for completion this year; 5) The status of liaison activities with the Association of Research Libraries and MLA; and 6) Other topics scheduled for discussion at the upcoming November Committee meeting in Boston.

The 31st Edition *Annual Statistics* Surveys: The surveys were opened much earlier than in previous years (from September 2 to mid November 2008) which made it possible to complete the editing and get the results posted for member access in the Annual Statistics Web Portal before the end of 2008. The final results included 124 libraries that completed the general Annual Statistics Survey and 115 libraries that completed the salary survey. The print version of the survey results (including a composite profile of the mean and median question values from the responding libraries, a salary regression summary, five year trends for core measures, and the tables with data for all questions from responding libraries) was published early in 2009.

A Comprehensive Membership Assessment of the *Annual Statistics* Surveys: In February 2009 the Committee distributed a detailed opinion survey, using the new AAHSL SurveyMonkey tools, regarding the scope and usefulness of specific existing questions (and potential new questions) for future *Annual Statistics* surveys. Some 94 people in current and potential AAHSL member libraries responded, providing extensive and very useful suggestions about the overall survey and about specific questions. These results are still viewable under the AAHSL passwords in the SurveyMonkey website.

Using this feedback, plus additional comments from AAHSL members, the Committee completed a complete review and revision of the *Annual Statistics* general survey instrument. Overall the new survey, with 65 questions, is eleven questions shorter than previous surveys but includes extensive changes, with only 16 questions from previous surveys retained with no changes. The remaining 49 questions include 24 that were revised from the previous surveys and 25 that were new to this survey. A total of 22 questions from previous editions of the surveys were deleted. The revisions also included enhanced instructions noting exactly how the AAHSL *Annual Statistics* questions are equivalent or similar to the Statistics surveys conducted by the Association of Research Libraries (ARL) and the US Department of Education National Center for Education Statistics (NCES). The most notable changes included:
- Greatly simplified questions to report volumes and titles in library collections

- New expenditures questions to report: a) expenditures for the consortial licensing of electronic resources and b) expenditures paid from Federal and other grant indirect cost reimbursements allocated to the Library from its parent university or school.
- Consolidated and simplified questions to report library staff FTE
- A question to report library Website "visitor sessions" (in addition to page views)
- Seven new questions to report measured uses of electronic resources
- A revision of the question for reference services (from reference "questions" to reference "transactions") to make the AAHSL definition the same as that for the ARL and NCES surveys
- Expanded, more precise questions to report education and outreach services

The Current 32nd Edition *Annual Statistics* Surveys: Detailed instructions and background information about the survey changes were distributed to all AAHSL members via the AAHSL listserv in July and this resulted in some additional questions from members about the instructions and specific questions. We responded to these and incorporated some clarifications and minor revisions into the final version of the Surveys in the Web Portal and also distributed supplementary more detailed instructions for the new questions to report measured uses of electronic resources (in conformity with Project COUNTER standards). As with the 31st Edition surveys, the general *Annual Statistics* and Salary surveys were opened for data input on September 1 and will remain open until the end of October (unless, based on the responses, we agree an extension is needed). As of the writing of this report (October 14), 12 Annual Statistics surveys and 30 Salary surveys have been submitted. Twelve members of the Committee are serving as editors this year.   Since the revisions to the Annual Statistics survey were so extensive this year, we agreed to delay repeating the Services and Resources Profile Survey until after the other 32nd Edition surveys are all submitted. The Committee will discuss the exact timing of this survey at its Boston meeting next month. We also agreed to delay repeating the Descriptive Statistics Survey until we have a Web Portal mechanism and policies in place to allow for libraries to update this information regularly.

Enhancements to the Web Portal Survey and Data Analysis Tools: The approved Committee budget for 2009 was enough for an additional six weeks of programming time from Steve Gallo, our software engineer and database architect at the University at Buffalo Center for Computational Research (CCR). Working from a prioritized list of programming projects established by the Committee, Mr. Gallo has completed all of the following Web Portal enhancements so far this year:
- He created a Portal user role for AAHSL Headquarters staff which allows them to add or delete library records as well as records for individual library directors or staff members. They also now have tools to resolve problems with user passwords and they can view the data from past surveys in the Portal.
- We mapped the data from one additional year of retrospective data (for the 28th Edition *Annual Statistics*, 2004-05) to the other previous surveys in the Portal. With the completion of the 32nd Edition surveys we will have five years of retrospective data in the Portal.

- He added an "Estimated Data" checkbox to each survey question in the survey instrument for the 32nd Edition *Annual Statistics* survey and a mechanism for displaying this data with an "E" in the published survey results.
- He created a new "Senior Staff" role which Library Directors can now assign to staff that they would like to be able to see and enter data for the Salary Survey. This survey was previously restricted to the Library Director.
- He created a mechanism that allows Canadian libraries to enter their responses to the Expenditures and Salary questions in Canadian dollars, and then use the conversion factor to display those results in the published results in both US and Canadian dollars
- He re-programmed the "Submit Final Survey" button on the two surveys so it is always centered and visible on the survey user's screen.
- He re-programmed the Salary Survey matrix so the row labels for the matrix (in the left-most column) are fixed and remain visible when the user scrolls to the right to add addition professional staff salary data.

Two additional enhancements have been budgeted for completion this year:
- Creating a mechanism that will allow library directors or other authorized staff, with review and oversight by Assessment & Statistics Committee editors, to correct erroneous data from previous surveys in the Portal and to mark those corrections as "not original" data and annotate the corrections with the date and name of the persons authorizing the change.
- Based on a printing problem noted by several library directors since the surveys were opened in September, Mr. Gallo will also program a mechanism to make it possible to easily print a library's completed Salary Survey matrix

If any time remains in this year's budget for Mr Gallo's time at the end of 2009, we will work to enter one additional year of retrospective data (for the 27th Edition, 2003-04) into the Web Portal.

Liaison Activities with ARL and MLA: During the process of revising the 32nd Edition *Annual Statistics* survey questions, Gary Byrd consulted with Martha Kyrillidou at ARL about the status of their survey questions and Ms. Kyrillidou suggested it would be helpful for her to have read-only access to our Web Portal. After consulting with our Committee Board Liaison Connie Poole and President Julie Sollenberger, we agreed to provide her with an account to access the Portal. No additional action has been taken with the ARL MINES (Measuring the Impact of Networked Electronic Services) and AAHSL. Based on a report provided by outgoing Committee member Cynthia Henderson, we know that only five AAHSL libraries registered to participate in the ARL LibQual+ survey in 2009:
- Temple University Health Sciences Center
- Texas A&M University, College Station, Medical Sciences Library
- University of Alabama at Birmingham, Lister Hill Library
- University of Texas at Galveston Medical Branch, Moody Medical Library
- University of Vermont, Dana Medical Library

To date, 63 academic health sciences libraries have participated in LibQual+ ranging from six times (Galveston), to 4 times (three libraries), to 3 times (nine libraries), to one or two times (50 libraries). The largest number of AAHSL libraries participating in one year was 35 (in 2002).

Due to the press of other Committee business this year, no additional action has been taken on completing the suggested comparative analysis of data from the 2007 AAHSL *Annual Statistics* survey and the 2007 MLA Benchmarking survey. We will review this potential area of collaboration with MLA again at our Boston meeting in November.

Additional Topics for Discussion at the Committee meeting on November 6:

In addition to reviewing the current status and future goals for all the activities included above in this report, the following will be additional topics of discussion at our all-day meeting in Boston on November 6:

- Reviewing the recommendations of the AAHSL Membership Task Force as they apply to participation in and use of the Annual Statistics.
- Potential strategies for further integrating or linking access to the Annual Statistics Web Portal within the new AAHLS (Memberclicks) Web Portal
- Completing a recommendation for policies and procedures to grant access to Annuals Statistics data for research purposes
- Setting priorities for further enhancements to the Annual Statistics Web Portal survey and data analysis tools

Committee membership:

Completing their service with the editing of the 32nd Edition surveys—
      Eric Albright (2009)
      Marianne Burke (2009)
      Barbara Epstein (2009)
      Connie Poole (2009)
Continuing their service on the Committee—
      Gary Byrd (2012)
      Mary Blackwelder (2010)
      Diana Cunningham (2010)
      Christine Frank (2010)
      Susan Kendall (2011)
      Beth Layton (2011)
      Joanne Muellenbach (2011)
      Steve Squires (2012)
      Nancy Woelfl (2010)
Joining the Committee as of the 2009 Annual Meeting in Boston—

Ellis Beteck (2012)
Terry Henner (2012)
Jeanette Ryan (2012)
Andrew White (2012)

Respectfully submitted,

Gary D. Byrd, Ph.D.
University at Buffalo