Introduction
In 2016, ASERL (Association of Southeastern Research Libraries) began a pilot project that will help libraries develop new ways to tell their story beyond traditional metrics such as circulation and door counts. We plan to examine our existing metrics in ways that emphasize research libraries support of teaching and learning. The three-year pilot project aims to establish small groups of variables in three areas: collection use, services, and facility usage. By the end of the project we plan to deliver a model that helps libraries use data they already collect in new ways that help them tell their story.

To do this, ASERL brought together an interest group from the following 20 member institutions:

- College of William & Mary
- Duke University
- East Carolina University
- Emory University
- Florida International University
- Florida State University
- George Mason University
- Georgia State University
- Louisiana State University
- Mississippi State University
- University of Alabama
- University of Central Florida
- University of Florida
- University of Louisville
- University of Mississippi
- UNC Chapel Hill
- UNC Charlotte
- Virginia Commonwealth University
- Virginia Tech
- Wake Forest University.

Problem
Increasingly, libraries are being asked to demonstrate their impact and value to students and faculty; however, libraries may not have the staff or tools to facilitate this request. ASERL recognizes that while libraries may not have on-staff expertise and resources to communicate their value, they do collect large amounts of data in the course of their regular activities.

Exploring a solution
Over the next three years, the ASERL New Metrics Group will develop a toolkit requiring minimal additional data collection and in-house training that libraries can use to communicate their value and impact.

The initial phase of the project resulted in the following:
- the vision and principles for the pilot project,
- a list of target audiences for new metrics reporting, and
- a review of existing measures found in many libraries.

Vision and Principles
The Vision and Principles Task force performed an environmental scan of other organizations as well as the work of Kouzes and Posner (citation?) on creating a vision to craft the vision and principles below.

Vision:
The “New Metrics for Research Libraries” pilot will create a model for ASERL member libraries to lead assessment activities that inform data-driven decision making and evidence-based analyses. The three-year pilot will examine existing metrics in new ways, searching for opportunities to demonstrate library impact and value to stakeholders.

These activities support the creation of a culture of assessment to demonstrate the impact of libraries and reinforce the competencies needed to capture, measure and illustrate library value. The principles below illustrate current and aspirational practices that guide assessment in ASERL member libraries.

Principles that guide library assessment in ASERL member libraries include:
- Provide a framework for regular and rigorous assessment that fosters understanding of library services, collections and library spaces;
- Develop and sustain a culture of assessment at all levels in the library;
- Establish and maintain access to assessment data and management tools to support library scholarship, research, and outreach;
- Facilitate assessment skills to empower librarians to demonstrate and document library value;
- Assist in the assessment of student learning, both program-wide and within individual projects;
● Collaborate in a spirit of collegiality with faculty to demonstrate the impact of teaching and learning;
● Always maintain a user-centric vision for all aspects of library efforts.

The vision encompasses the view that assessment is central to demonstrating our impact and that institutions will work collaboratively to create a framework that we can all use. The statement also recognizes that each institution also operates within a separate context which means that the framework must be flexible to meet different needs.

**Target Audiences**
The Target Audience task force was asked to define the primary and secondary audiences for this project and subsequent work. The group identified the following constituents through their research. The primary audience is defined as those essential to specific institutions while the secondary audiences recognized the need to reach our professional community.

**Primary audiences for ASERL New Metrics**

- University stakeholders outside the library, including the following:
  ● university administration
  ● university-level assessment staff, including those responsible for university accreditation
  ● teaching and research faculty
  ● graduate students who will work with libraries once they are faculty
  ● undergraduate students who may not understand the diversity of what a university library has to offer
  ● post-docs/researchers who rely on support from the library for their work
- Potential donors to the university and library
- Legislators
- Funding agencies (e.g., grant-funding bodies)
- Members of the public who are interested in libraries and higher education but uncertain about what 21st century libraries look like and the role they serve on a campus and in the community (note that these members could be potential donors, funders, legislators, parents of students at our universities, etc.)

**Secondary audiences for ASERL New Metrics**

- Professional associations (e.g., ALA, ACRL) interested in demonstrating value and impact of libraries
- Library professionals frustrated with limitations of ARL and IPEDS metrics who want to tell the story of their work with richer, more qualitative data
● Library professionals interested in doing something meaningful with the massive amounts of data we're already collecting
● Library administrators looking for new models to present their data and tell their stories
● Stakeholders within the library who want to make data-driven decisions
  ○ E-Resource purchasing staff
  ○ Space planners

**Review of Existing Measures**
The review of existing measures task force performed an environmental scan of data already collected by many libraries as well as identifying other measures that some institutions gather. They gathered data from ARL and IPEDS sources as well as polling colleagues on their data gathering practices. The list includes data from the following areas: collections, services, facilities, institutional characteristics, and surveys or other points of information. The complete list can be found on the [ASERL New Metrics website](#) or on our Google drive located [here](#). The proposed framework will use these metrics to tell a story that moves beyond counting items. The desire is to combine these metrics along with best practices in assessment to provide a holistic picture of our impact on our constituents. The group suggests that qualitative data can be used in conjunction with these metrics to provide context to the specific institution.

**Next Steps**
The ASERL New Metrics group identified areas of concern that the group will address moving forward. First, the name “New Metrics” may insinuate that library staff must gather additional data or take on additional work, something not likely to be well received by short-staffed libraries in particular. The working group will rename/re-brand the project to capture more accurately the intent of the new framework.

During the early stages of the project, team members discovered other, perhaps similar, initiatives. The group will create a task force to explore these initiatives and determine how we can advance our project without duplicating work. This includes exploring other institutions' dashboards such as those in Figures 1 and 2 below.

*(See figures on following pages.)*
Research Services: LibAnswers 2014-

LibAnswers serves as University Libraries’ official source for recording reference transactions for the annual ARL Statistics publication. This dashboard tracks the types of questions University Libraries’ faculty and staff answer, information that helps to inform the development of future library services.

Select Library Location

Select a Time Period

Research Services Trends

By Quarter and Question Type, 2009 to present

<table>
<thead>
<tr>
<th>Year</th>
<th>Basic Reference</th>
<th>Directional</th>
<th>Research Consultation</th>
<th>Grand Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>10,983</td>
<td>11,093</td>
<td>4,454</td>
<td>26,530</td>
</tr>
<tr>
<td>2016</td>
<td>8,056</td>
<td>10,710</td>
<td>3,253</td>
<td>22,019</td>
</tr>
<tr>
<td>2014</td>
<td>5,204</td>
<td>5,868</td>
<td>2,292</td>
<td>13,364</td>
</tr>
<tr>
<td>Grand Total</td>
<td>24,243</td>
<td>27,671</td>
<td>9,999</td>
<td>61,913</td>
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</tbody>
</table>

Figure 1: Ohio State University Libraries dashboard on research services trends
The working group will also provide definitions for assessment, data, and visualizations that we can share with other institutions as the project grows. We want to ensure that the libraries have a shared understanding of the terms necessary to implement their projects.

Additionally, in spring 2017 the ASERL New Metrics group will begin working with volunteer libraries to develop a prototype combining more traditional assessment measures and storytelling techniques. Phase one of the prototype will explore existing measures and begin to make connections among collections, spaces, services, and related data. The working group will request group participation in our December, 2016 meeting.
The group will perform three iterations of the proposed framework during the spring of 2017 and provide the prototype to our target audiences by June 2017. Following the review we propose sharing the working prototype for public review and comment in July 2017. The full timeline is below and in the ASERL New Metrics shared drive.

**Milestones**

<table>
<thead>
<tr>
<th>Item</th>
<th>Proposed Completion</th>
<th>Complete</th>
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<tbody>
<tr>
<td>Create definitions team</td>
<td>10/3/2016</td>
<td>Yes</td>
</tr>
<tr>
<td>Approval of Vision and Principles</td>
<td>11/11/2016</td>
<td>Yes</td>
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<tr>
<td>Approval of Target Audiences</td>
<td>10/31/2016</td>
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<td>Approval of Review of Existing Measures</td>
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<td>Whitepaper based on the above</td>
<td>12/1/2016</td>
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<tr>
<td>Initial model/prototype Iteration 1</td>
<td>2/15/2017</td>
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<tr>
<td>- Iteration 2</td>
<td>3/15/2017</td>
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<td>- Iteration 3</td>
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<tr>
<td>Deadline -- Feedback from provosts &amp; other target audiences on refined prototype</td>
<td>6/1/2017</td>
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<tr>
<td>Working prototype posted for public review &amp; comment</td>
<td>7/15/2017</td>
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**Conclusion**

The ASERL working group will ensure that we provide a flexible, contextually relevant framework for institutions, as opposed to a white paper merely providing more assessment ideas. While we feel it is important to share assessment practices, it is more important to our work that we demonstrate effective ways to connect existing data with storytelling practices. ASERL is in a good position to take on this project given the organization's wide range of membership and available expertise. In addition, it provides an excellent opportunity to create a community of assessment that creates and shares best practices across all of our member institutions and with others across the larger library community.

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Project webpage: [http://www.aserl.org/new-metrics-for-research-libraries/](http://www.aserl.org/new-metrics-for-research-libraries/)