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### What to Count, What to Report: The Revised ABA Annual Questionnaire (AALL Program Report)

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## What to Count, What to Report: The Revised ABA Annual Questionnaire (AALL Program Report)

by Ellen McGrath, University at Buffalo Law Library

This program was held on July 16, 2007 during the AALL Conference in New Orleans and was very well-attended. Paula Tejada (Charleston School of Law Library) served as coordinator and moderator. The first speaker was Carol Avery Nicholson (University of North Carolina at Chapel Hill Law Library), a member of the ABA Law Libraries Committee. She provided the background on the process of revising the ABA annual questionnaire and included the actual language of pertinent standards on her slides. Carol mentioned that the print volume count will be dropped from the ABA statistics after two years. That is causing some controversy, but the real confusion centers around the counting of electronically available resources (or e-resources). The slide listing the changes in the counting of e-resources beginning with CD-ROMs back in 1991 helped to pin down when our confusion started, though it seems to have escalated lately. The goal of the ABA is to hone in on whether our library has control over its e-resources. Thus only owned e-resources (perpetual access) can be counted, while licensed e-resources may not, including those e-resources provided by our main libraries.



Joseph Hinger (St. John's University Law School Library) was up next and he was careful to define his purpose at the outset. He was there to help us answer the questions on this year's ABA annual survey, not to debate the pros and cons of the recent revisions to those questions. Joe explained that the changes are brand new and the interpretations are still evolving, but the revisions take effect immediately. The existence of MARC bibliographic

*(Continued on page 29)*

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# What to Count, What to Report

(Continued from page 28)

records in our local catalogs is no longer relevant since access to these e-resources can be provided through federated search tools. What matters is whether we “own” or simply “access” an e-resource. The litmus test that Joe suggested is to ask this question: If the company pulled the plug tomorrow, could we still access the e-resource? If the answer is yes, count it. If the answer is no, do not count it. The question of whether we are truly in possession of the data if our ability to use the company’s search engine to access it has gone away was raised later on. Joe conceded this is a gray area, for which he has no answer. On the plus side, some vendors that did not previously do so are beginning to provide perpetual access (ownership) in response to these ABA survey revisions. Joe also had some suggestions about using our local systems to help us gather these ABA statistics, by applying mutually exclusive coding to our records. A temporary solution he put forward was to use the 856 subfield z to record the values of “owned” or “accessed.”

Gordon Russell (Charleston School of Law Library) was the final speaker and his presentation title was “Building digital access points—the new standards—why ownership is irrelevant?” He focused on the terms “consistent” and “reliable” as related to access in the ABA standards. But he then pointed out that we are not allowed to count many of the large packages, such as HeinOnline, even though we think of them as our method of providing consistent and reliable access to our library users. Gordon noted that some companies that did not previously are now providing a data ownership option. But that usually necessitates spending extra money in order to be able to count those e-resources on our ABA statistics. He pointed out an example on the ABA questionnaire that says we may count a government document e-resource that has been downloaded onto our library’s local server. He then raised the question: Why is that access considered more reliable or consistent than getting to that e-resource through a PURL (permanent URL)? Gordon took a few informal polls using clickers that had been handed out, which quantified the high level of unhappiness and confusion associated with the ABA survey revisions.

During the Q&A at the end of the program, one attendee commented that we have been struggling with these same issues for forty years and these revisions still do not measure how we serve our patrons (which received a big round of applause). Carol responded that the next step is for the Committee to focus on output measures, in order to get at how we serve our patrons. Rita Reusch (University of Utah Law Library and Chair of the ABA Law Libraries Committee) responded by saying that some had suggested the focus be on money spent by the library, but that did not seem appropriate to the Committee. At present, the Committee is working toward getting a FAQ up on the web very soon. The goal of the FAQ will be to ensure that we are all at least counting whatever we are counting in the same way (comparing apples to apples). It was clear that there is an enormous amount of frustration experienced by those of us completing the ABA survey each year. This program showed that those of our colleagues actively involved in trying to reduce this frustration level are confronted with a very difficult task. I commend them not only on their willingness to put in the time and effort to improve the ABA survey, but for their willingness to come before us and face the criticism and heated emotions.

## Handout materials at:

[http://programmmaterials.aallnet.org/download\\_step1.asp](http://programmmaterials.aallnet.org/download_step1.asp)

Choose F7 and click “select a program.”

*Note: A slight variation of this report appeared first in the TS-SIS Annual Meeting Blog (<http://tssis.blogspot.com/>) on July 23, 2007. Thank you to Chris Tarr for permission to reprint it here!*

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## Update:

On August 17, 2007, the ABA Law Libraries Committee announced the availability of a *List of Frequently Asked Questions* prepared to help law libraries complete the ABA annual questionnaire. It is presented along with the *Guide to Counting Titles and Databases* at: <http://www.aallnet.org/sis/allsis/committees/statistics/index.asp>