

# **Making Library Assessment Work**

## ***Progress Report of an ARL Project***

**Steve Hiller**

University of Washington

**Jim Self**

University of Virginia

&

**Martha Kyrillidou**

Association of Research Libraries

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# **Making Library Assessment Work: Practical Approaches for Developing and Sustaining Effective Assessment**

- Association of Research Libraries Project
  - Under the aegis of Statistics and Measurement Program
- Funded by participating libraries
- Site visits by Jim and Steve
  - Pre-visit survey
  - Presentation
  - Interviews and meetings
  - Written report for each Library
- Phase I: 7 libraries in Winter and Spring 2005
- Phase II: 16 libraries during 2005-06
- Final report to ARL in late 2006

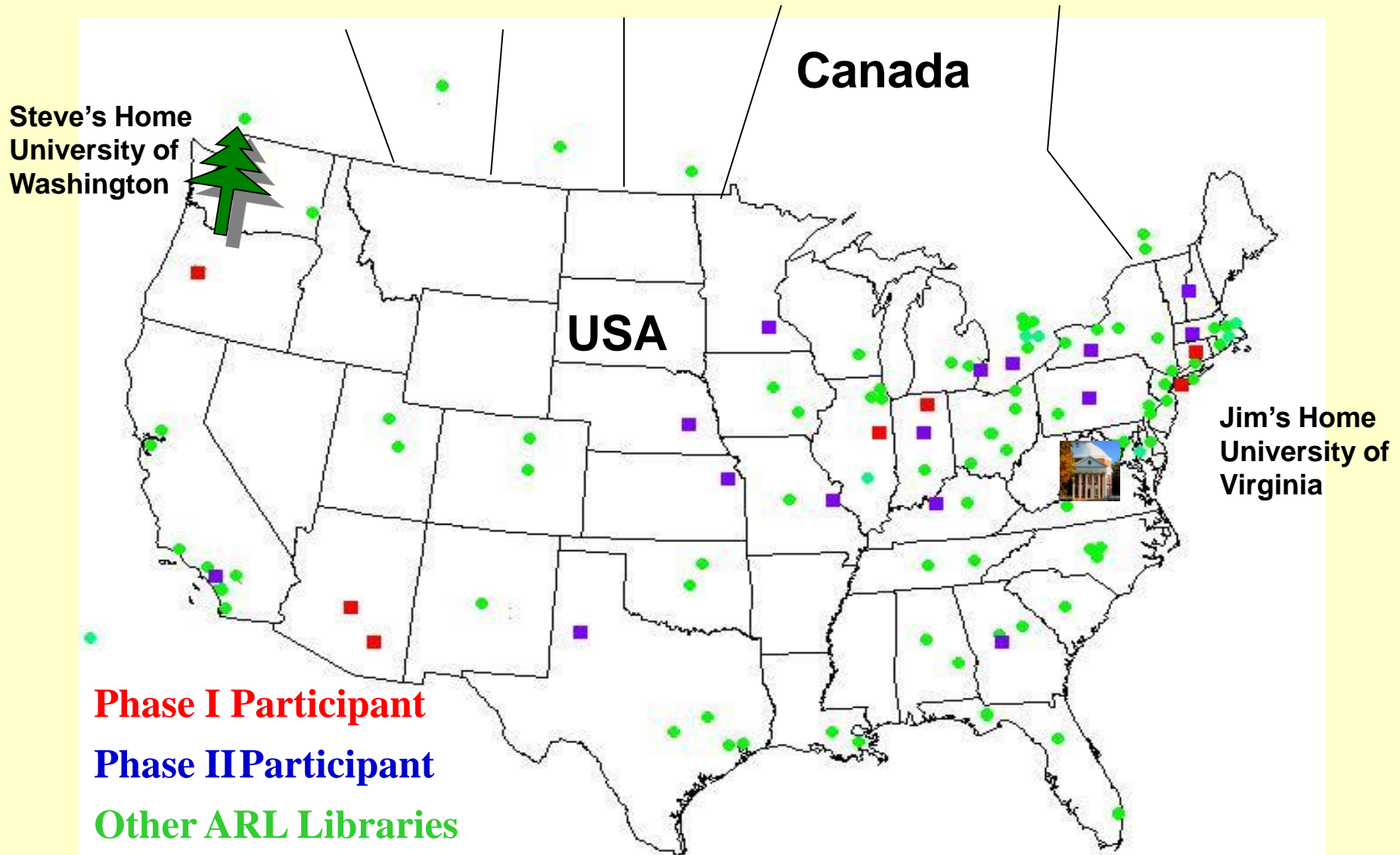
# Issues in Using Data Effectively

- Library leadership
- Organizational culture
- Priorities of the library
- Sufficiency of resources
- Data infrastructure
- Assessment skills and expertise
- Sustainability
- Presenting results
- Using results to improve libraries

# Phase I Process

- Proposal discussed with ARL, June 2004
- Final proposal written with Martha, August 2004
- Invitation to participate sent by ARL in Sept. 2005
- 16 libraries express interest; 7 chosen for Phase I
- Phase II will accommodate the other libraries
- “Pilot” site visit in early November

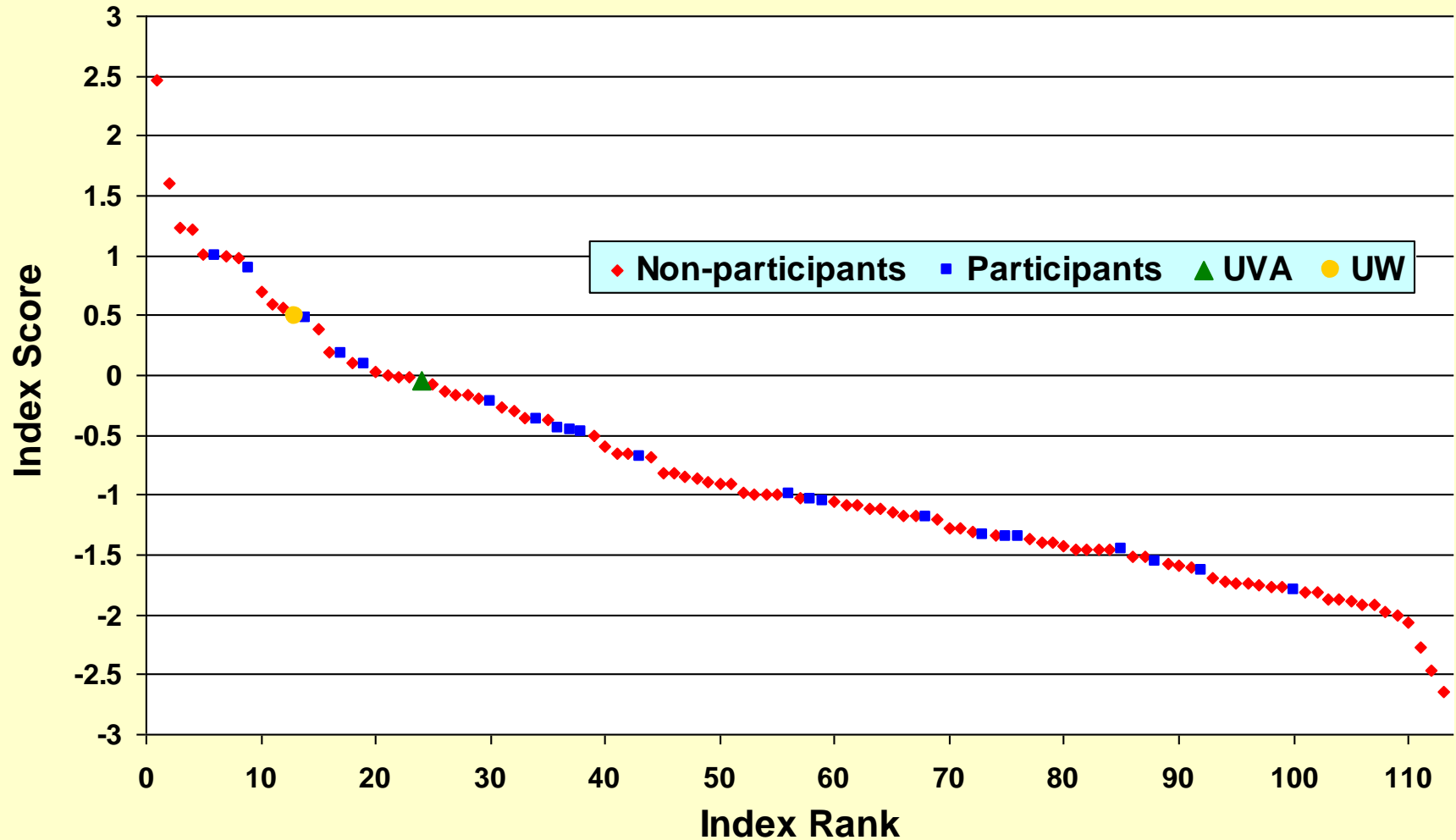
# The Geographic Distribution of Participants (Jim and Steve Earn Frequent Assessment Miles)



# Distribution Of Participants by

## ARL Index Ranking (113 Academic Libraries)

**22 Participating Libraries: Mean 50.5 Median 49.5**



# Phase I Participants

## Primary Organizational Contacts

- University of Arizona Administration
- Arizona State University Services
- University of Connecticut Collection Services
- University of Illinois U-C Services
- New York University Public Services
- University of Notre Dame Public Services
- University of Oregon Administration

# Pre-Visit Survey

- Summary of recent assessment activity
- Inventory of statistics kept
- Important assessment motivators
- Organizational structure for assessment
- What has worked well
- Problems or sticking points
- Specific areas to address
- Expectations for this effort

# Assessment Activities/ Our Evaluation

	LibQUAL+ ™	Other Surveys	Focus Groups	Usability	Performance Measures	Cost studies
<b>Library 1</b>	Green	Yellow	Green	Green	Green	Green
<b>Library 2</b>	Green	Red	Red	Red	Red	Yellow
<b>Library 3</b>	Green	Yellow	Yellow	Yellow	Yellow	Green
<b>Library 4</b>	Yellow	Green	Red	Red	Red	Yellow
<b>Library 5</b>	Yellow	Yellow	Green	Green	Yellow	Green
<b>Library 6</b>	Yellow	Red	Red	Green	Yellow	Green
<b>Library 7</b>	Green	Red	Red	Yellow	Red	Yellow
<b>KEY</b>	<b>EXCELLENT/ ONGOING</b>		<b>AVERAGE/ OCCASIONAL</b>		<b>POOR/ RARELY</b>	

# Library-Identified Assessment Needs

	Data Collection	Data Analysis	Data Use	Skills & Abilities	Perform. Measures	Data Warehouse	Sustain	Assessment Culture
Library 1		★	★	★		★	★	
Library 2		★	★	★		★		★
Library 3	★	★	★	★	★			
Library 4			★					★
Library 5	★	★	★	★	★	★	★	★
Library 6	★	★	★	★				★
Library 7	★	★	★	★	★		★	★

# Assessment in the Organization

	<b>Specific Position</b>	<b>Assessment Committee</b>	<b>Group with Major Responsibility</b>	<b>Other Ongoing Groups</b>
<b>Arizona</b>				<b>Distributed within team structure</b>
<b>Arizona State</b>				
<b>Connecticut</b>			<b>User Team</b>	<b>Design &amp; Usability Network Services</b>
<b>Illinois</b>			<b>Services Advisory</b>	<b>User Education Collection Development</b>
<b>New York U</b>		<b>Established 2005</b>		
<b>Notre Dame</b>				<b>Usability Group Libraries Task Force</b>
<b>Oregon</b>				

# Sample Site Visit Schedule

- Meet with University Librarian/Contact person
- Presentation on effective assessment
  - 90 minutes to 2 hours with Q&A
    - Concepts and best practices
    - Examples from UVA and UW Libraries
- Group Meetings
  - with management/administrative group
  - assessment-related group (if formed)
  - different departments
  - functional areas/groups (e.g. info literacy)
- Wrap-up session

# Rise of User-Centered Library and the Culture of Assessment in the 1990's

## *User-Centered Library*

- All services and activities are viewed through the eyes of the customers
- Customers determine quality
- Library services and resources add value to the customer

## *Culture of Assessment*

- Organizational environment in which decisions are based on facts, research and analysis,
- Services are planned and delivered to maximize positive customer outcomes

# **UVA and UW Assessment Examples**

## **University of Virginia**

- Compilation of data from varied sources
  - Including extensive survey data
- Performance and financial standards
  - Balanced Scorecard
- Data presentation and use for improvement

## **University of Washington**

- User needs assessment
  - Triennial large-scale user surveys since 1992
- Ongoing qualitative input
- Data presentation and use for improvement

# Presentation Slide That Fostered Most Discussion

*University of Virginia Balanced Scorecard*

*Metric U.3.A – Circulation of New Monographs*

- *Target1*: 60% of newly cataloged cataloged monographs should circulate within two years
- *Target2*: 50% of new monographs should circulate within two years.

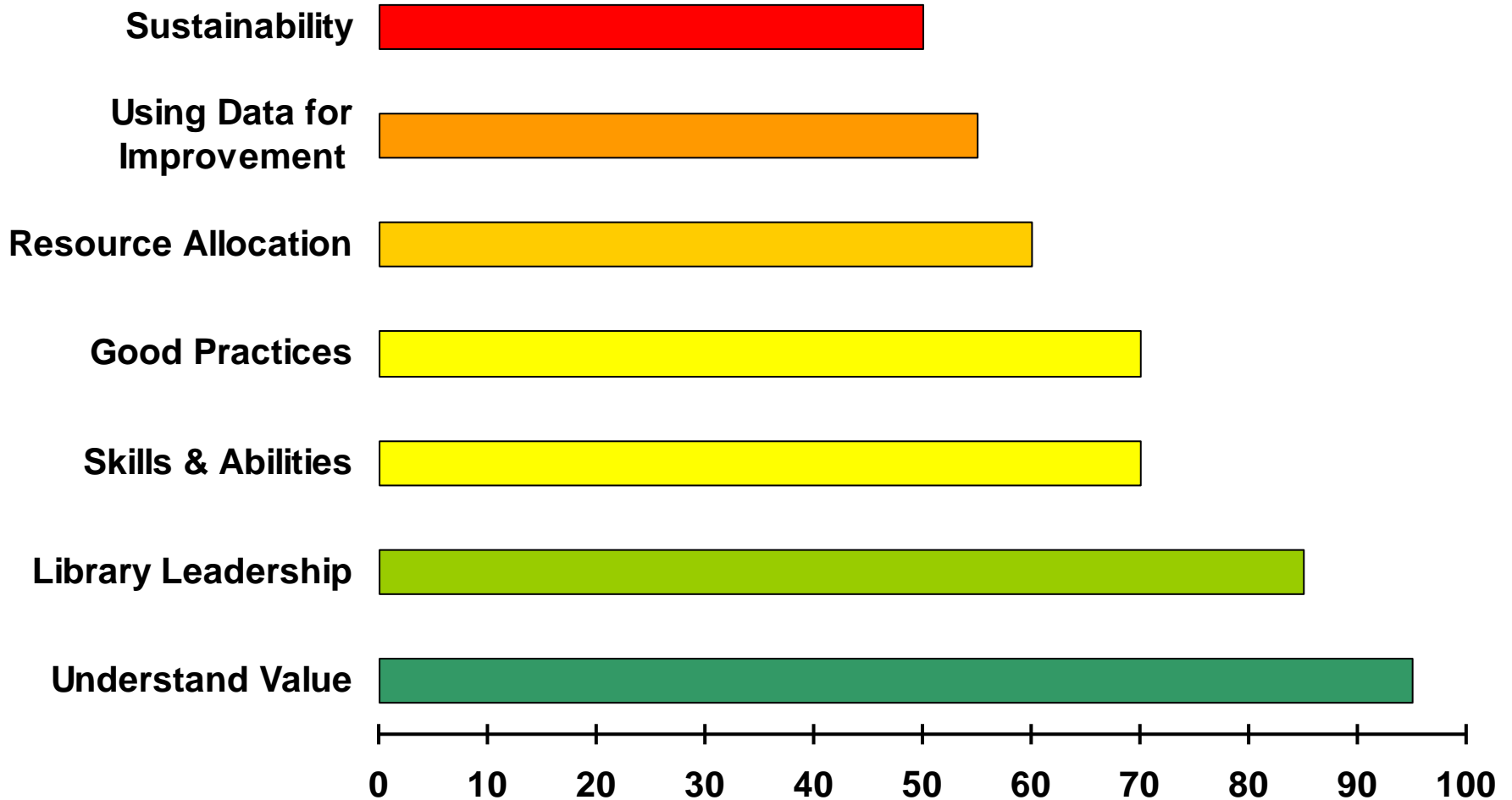
# Overview of Phase I Visits

- Diverse organizational cultures
  - Every library is unique
- Reception overwhelmingly positive
  - Although each library has a few curmudgeons
- Spirited and engaged discussions
  - “Didn’t know that assessment could be this interesting”
- Facilities renovation appears as important catalyst
- Most people ready and willing to do more

# Sample Report Format

- Introduction
- Current Assessment Environment and Activities
- Identified Issues and Concerns
- Suggestions & Options for Moving Assessment Forward (5-7 )
- Conclusion

# Phase I: A Preliminary Report Card on Assessment at 7 ARL Libraries



# Recommendations for Libraries

- Coordination of/responsibility for assessment
- Prioritize assessment activities
- Move from project-based to sustainable assessment
- Share/publish assessment results
- Allocate sufficient resources to sustain assessment
- Review internal statistics kept
- Need to incorporate data into library management
  - Management information systems important
- More knowledge of related on-campus activities
  - Outcomes assessment
  - Data warehousing

# Feedback on Process from Libraries

- One day is too short
- Resource materials would be helpful
- Include more real-life examples
  - Show me the data!
- Follow-up activity would maintain momentum
- Establishing assessment “community” would keep people involved

# Phase II Enhancements

- Site visit increased from 1 day to 1 1/2 days
- Appropriate resource materials will be provided
- Web site strengthened
- Consulting on a follow-up activity
  - Assessment plan implementation
  - Specific assessment effort
  - Meet at professional conference
- Group meeting at a professional conference

# Phase II Participants

- Scheduled for 2005

- Emory\*
- Kansas
- Louisville\*
- Massachusetts\*
- Wayne State\*

\*Assessment position in library

- Planned for 2006

- Boston Public Library
- Cornell\*
- Dartmouth
- Minnesota
- Nebraska
- Pennsylvania State
- Purdue
- Southern California
- Texas Tech
- Washington U. (St. Louis)
- Western Ontario

# Reporting Venues

- Presentations
  - ARL Survey Coordinators Meeting, Chicago, June 27
  - Northumbria International Conference, August 24
  - 3<sup>rd</sup> International Evidence-Based Librarianship Conference, Brisbane, Australia, October 19
  - Assessment Conference, Charlottesville VA, Autumn 2006
- Web Site
  - [http://www.arl.org/stats/Hiller\\_Self.html](http://www.arl.org/stats/Hiller_Self.html)
- Final Report
  - Late 2006