Using assessment as a tool for relationship-building: proving need, gaining traction with your strategic goals, and demonstrating a dedication to equity

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Introduction

This paper details the purpose, methods, and results of a 6-year phased assessment of collections and space at the Utah State University (USU) Blanding library, a small academic library serving a diverse Indigenous American population from the Mountain West. Despite its merger with the USU Statewide system, there have been minimal collections and space refreshes compared to the central campus library in Logan, the Merrill-Cazier Library. Librarians from the Logan campus, recognizing the equity issues at play, conducted comprehensive assessments to support the evaluation of the library's collections use, space utilization, and technology concerns. These assessments involved extensive interviews with a variety of stakeholders, focus groups, collections analyses, and space assessments. The findings highlighted the need for a holistic overhaul to better facilitate student success and foster stronger connections to the wider USU Libraries network. This paper also contributes to discussions about how to approach building trust with assessment processes using an equity mindset in order to increase the overall effectiveness of your efforts.

USU Statewide

Since 1990, USU Libraries has provided library services to distance USU students, faculty and staff, now referred to as our Statewide Campuses, the university's approach to fulfilling its Land Grant mission. USU Libraries have always been guided by the philosophy that members of the distance learning community are entitled to library services and resources equivalent to those provided for students and faculty at the Logan (central) campus. Those learners studying online or at a distance have access to the majority of the Libraries' collection. Back then, this service was available via a toll-free number and web-based forms. Consortial agreements have broadened the scope of electronic resources that are accessible for research and instruction. By utilizing resource sharing and reciprocal agreements, the distance learners have access to the collections of all academic libraries in Utah.

USU's status as a "Land Grant" college traces its history to the Morrill Land Grant acts, first passed in 1862 with the purpose of using the sale of Federal Lands to fund colleges that teach agricultural and mechanical arts (which some might recognize as the "A&M" of many universities across the US). This mission was extended by the Smith-Lever Act of 1914 via the creation of extension services to take the lessons and skills taught by the land grant colleges to the citizens throughout a state. These two laws, along with the Hatch Act of 1887, laid the foundation of USU's newly coined "Statewide Enterprise" which brings together not only the Statewide Campuses system, but also USU Extension and its Agricultural Research Stations.

As a whole, USU Statewide is currently organized into seven different administrative regions.[1] Each of these regions is overseen by an Associate Vice President (AVP) who acts as chief administrator for the campuses/centers in their region. The facilities in each region can vary from the residential campuses in Price and Blanding, to large centers with multiple classrooms, offices, along with other amenities like study/meeting rooms, lounges, and even a gym, to trailer homes retrofitted to have small rooms for connecting to classes or a room or two rented in a local high school or other facility. The AVP of each region reports to the Vice President for Statewide Campuses, who heads a small team of administrators that ensure the delivery of courses along with support services for Statewide Campus students. This VP reports to the Senior Vice President of the Statewide Enterprise, who in turn reports to the President of the University.

USU Blanding, along with USU Eastern, were folded into USU Statewide in 2010 when the College of Eastern Utah in Price, UT, along with its San Juan Center in Blanding, were merged with USU and made a part of its Statewide Campuses system. Blanding, the focus of this paper, and Eastern are the only parts of the Statewide Campuses who have both a residential student population and a physical library.

These libraries are managed mostly independently of the Merrill-Cazier Library (MCL) in Logan, and also have separate operational, collections, and salary budget appropriations—all of which are allocated from the larger budget appropriate to the Statewide Campuses. However, Price

and Blanding rely on the electronic resources paid for by Logan, along with support for processing new books and the maintaining of catalogs and digital collections. However, MCL and its faculty and staff have no administrative purview of services or spaces in neither Price nor Blanding.

Beginning in approximately 2004, the first Distance Education Librarian started traveling to the statewide campuses several times per year in order to build relationships with the students, staff, and faculty with these populations. After the merger with Price and Blanding in 2010, discussions with USU Blanding campus administration were focused on finding grants to purchase more print books for their satellite centers associated with the Blanding Campus, since many of the students who attended class there lived on the Navajo Nation, lacking electricity and a reliable Internet connection.

Since USU Libraries lack administrative purview over the Blanding site, this complicated the implementation of changes, raising questions about decision-making, funding, and project management for the Blanding Library. These uncertainties slowed the assessment and planning process, requiring thorough evaluations that in turn helped build trust among stakeholders—USU Logan and USU Statewide Campus librarians, Blanding administrators, and Blanding librarians—in each other's professional competence and intentions.

Design and Methodology

When approaching this project, we choose a scaffolded approach; meaning, one assessment and its findings helped us build the next assessment. We did this so that we were agile to change based on user needs that came up throughout the assessments.

Our scaffolded assessments happened in three major stages: an environmental scan stage, a qualitative stage, and a quantitative stage.

Stage 1: Environmental Scan

For our first stage – the environmental scan – we utilized several project management techniques: doing a strengths, weaknesses, opportunities, and threats - or SWOT - analysis, building a mission/vision statement, and sketching out a phase plan – essentially, process mapping.

Environmental Scan: SWOT analysis

First, we did the SWOT analysis which helped us set realistic goals, encouraging us to think about the realities that we might have faced "on the ground." The discussion highlighted whether or not we could mitigate the consequences of threats and weaknesses and capitalize on the strengths and opportunities. We shared this SWOT analysis, along with the other content, back and forth with the Blanding campus administration to ensure the process was inclusive. Figure 1 is an example of our SWOT analysis.

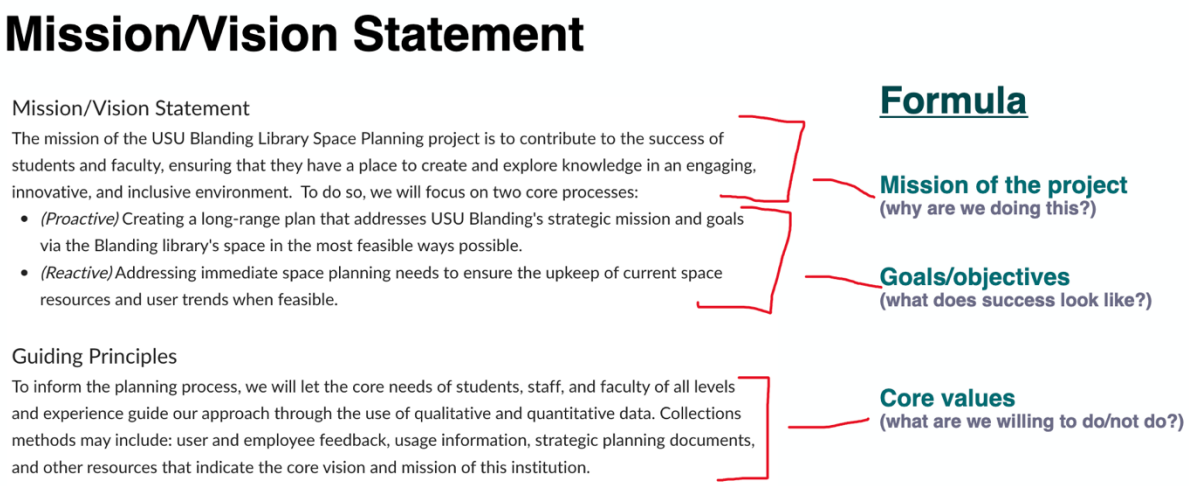
Figure 1 Strengths, Weaknesses, Opportunities, Threats analysis example

Strengths	Weaknesses
• Strong staff support for space changes • Logan campus Central Admin support • Project size and timeframe (6-12 months) is very manageable	• Part of space project group is not physically in Blanding • Space hasn't been updated in many years - budget and scale questions
Opportunities	**Threats**
• Can empower the students to create a space that is their own and reflects their needs, culture, and beliefs • LPM student on the ground to help with space assessment	• Due to physical distance, there's always the threat that the project will fall flat due to workloads and other responsibilities • Due to the small size of the space, we might not be able to meet all needs

Environmental Scan: Mission & Vision Statement

Next, we built out a mission/vision statement to set our boundaries and general operating procedures. Setting project boundaries and scope is incredibly important with a project such as this where we were not the primary employees on the ground. Not only did it help to clarify what we were NOT there to do – which helped ease tensions -- but it clarified what we could and could not help with based on our workloads, job purviews, and other time commitments. Figure 3 is an example of our mission and vision statement, including a “formula” that can help write one of your own.

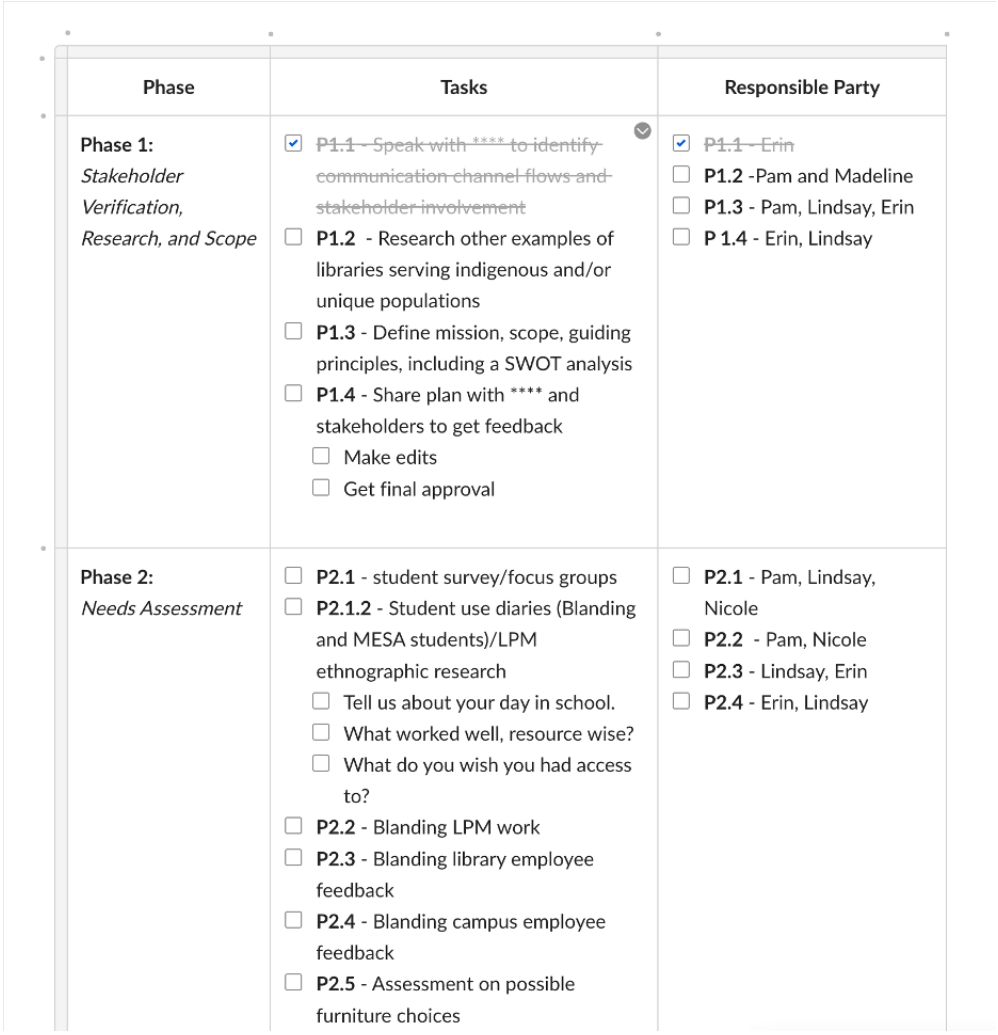
Figure 2 Mission and Vision Statement example with construction formula



Environmental Scan: Phase Plan Template

Third, we sketched out an agile phase plan. Figure 3 is an example of the instrument we used. Within each phase, we planned down to every detail; drafted and redrafted, ensuring our tasks were connected to our end goals and outcomes; then assigned the tasks to specific individuals. We used Box Notes to craft this so that we could check off completed tasks. Our scaffolded assessments fell mostly into Phases 1 and 2. Phase plans can be translated into other formats like a Gantt chart which gives you a timeline aspect to your planning.

Figure 3 Phase plan example



Phase	Tasks	Responsible Party
Phase 1: *Stakeholder Verification, Research, and Scope*	☑ ~~**P1.1** - Speak with **** to identify communication channel flows and stakeholder involvement~~ ☐ **P1.2** - Research other examples of libraries serving indigenous and/or unique populations ☐ **P1.3** - Define mission, scope, guiding principles, including a SWOT analysis ☐ **P1.4** - Share plan with **** and stakeholders to get feedback ☐ Make edits ☐ Get final approval	☑ ~~**P1.1** - Erin~~ ☐ **P1.2** -Pam and Madeline ☐ **P1.3** - Pam, Lindsay, Erin ☐ **P 1.4** - Erin, Lindsay
Phase 2: *Needs Assessment*	☐ **P2.1** - student survey/focus groups ☐ **P2.1.2** - Student use diaries (Blanding and MESA students)/LPM ethnographic research ☐ Tell us about your day in school. ☐ What worked well, resource wise? ☐ What do you wish you had access to? ☐ **P2.2** - Blanding LPM work ☐ **P2.3** - Blanding library employee feedback ☐ **P2.4** - Blanding campus employee feedback ☐ **P2.5** - Assessment on possible furniture choices	☐ **P2.1** - Pam, Lindsay, Nicole ☐ **P2.2** - Pam, Nicole ☐ **P2.3** - Lindsay, Erin ☐ **P2.4** - Erin, Lindsay

The three aforementioned project management techniques established our boundaries to protect the integrity of the process and put everyone at ease. We did not wish to convey the impression that we intended to highlight perceived shortcomings or instruct them on how to manage their library. Rather, our goal was to offer our expertise, having recently completed a comprehensive space assessment initiative, to support equitable treatment at our sister campus and contribute to the integration of modern library practices where students desired or required them.

These components of a project—while they may occasionally appear trivial or self-evident—must be thoroughly outlined. It is essential not to assume that all parties involved are aligned in their understanding. In our case, it was crucial that we maintained constant alignment and did not proceed on to the next step without the full agreement of all stakeholders. This approach served as a foundational principle throughout the entire process: ensuring that every voice was

heard, respected, and contributed to shaping any necessary changes.

Stage 2: Qualitative Assessments

For Stage 2, with students, staff, and faculty at the campus, we performed a series of semi-structured focus group interviews with students, semi-structured personal interviews with staff/faculty, and unstructured observational studies and an ethnographic summary.

Qualitative Assessments: Semi-structured focus groups

We first did semi-structured focus group interviews with the students where we had a guided, informal group interview/discussion to ask about student experiences, wants, and needs in their library.[2] During this focus group, we asked students the following questions:

1. What types of technology are students comfortable with? How would you feel about having these things in your library?
2. Are there cultural practices we should be aware of when conducting further assessments or refreshing the spaces and collections in the library?
3. Walk us through a day in the life of a student who lives on campus.
4. We say library, you say.....?
5. Do you feel respected in this space?
6. What is the best way to recruit students on campus for participation in further assessments? What motivates them?

Qualitative Assessments: Semi-structured personal interviews

We then conducted semi-structured personal interviews with faculty and staff (librarians included), which were 1:1 or 2:2 discussions with specific, predetermined questions with some opportunity for ad hoc discussion.[3] We asked the following questions:

1. Do you feel anything is missing, big picture, from your library?
2. What changes would you like to see in the library? What do you not want to see?
3. Is there a disconnect between the library and your needs?
4. How do professors use the library?
5. What have you heard students asking about?
6. Is there anything you struggle to do in your day-to-day tasks due to lack of support, resources, or spaces?

When we wrote the interview questions, we tried to map question language to outcomes such as wanting to know about library and technology comfort levels and whether the library needed specialized technology or related resources for their classes.

Qualitative Assessments: Observational study

Last, we conducted an unstructured observational study with the students who toured one of the research team members around their whole campus. The students talked about how they used campus spaces, how specific spaces made them feel, and what they wished the spaces could be.

Stage 3: Quantitative Analysis

Quantitative Analysis: Collections usage

The Assessment Librarian on the team performed a high-level physical collections usage analysis for the Blanding library. The report included the following information:

- A summary of items and their material types
    - This information provided a big picture view of what was in the library
- The total percentage of circulated versus non-circulated materials over time
    - This showed the volume of circulation over time
- Circulation by material type
- Data highlighting most popular areas
- Summary of circulation by Library of Congress classification and by Fiscal year
    - These data showed what subjects were popular and by date range
- Recommendations moving forward. Specifically, we recommended that they consider their limited amount of space and what they really want to highlight in that minimal amount of space.

Quantitative Analysis: Physical space analysis

The Blanding Library occupies part of the first floor of one of the campus classroom buildings, sharing space with the campus Writing and Tutoring Center. It also has a small Special Collections room that is also used as office space for a part time staff member in their student support services program. The library overall contains 3671.5 linear feet of shelving space as of 2022 (however recent changes to the space may have affected this figure) and has a current collection of around 15,000 volumes.

One of the biggest limiting factors for the Blanding Library is that it is a relatively small space, around 3804 square feet, roughly 1.3 tennis courts—or just under 5 pickleball courts. Trying to balance space for collections against space for students is tricky. However, over half of the library's total linear feet of shelving is in currently underutilized compact shelving and could help address this conundrum. More deliberate strategy is required to determine what should be included in the physical collection versus what can be accessed through interlibrary loan (ILL) services, as well as what belongs on traditional shelving versus compact shelving.

Quantitative Analysis: Interplay between space and collections

It is important to acknowledge the interaction between space and collections in projects involving the assessment of physical collections. We did not initially approach this project with the expectation of a significant weeding or reorganization of the collections. However, it soon became evident that such actions would be necessary to meet the goals of the project and fulfill the students' requests. In essence, students expressed a desire for more space and fewer books, which required reducing the number of book ranges—more than originally anticipated—

and finding creative solutions for their placement.

Given that the majority of the collections analysis data consisted of checkout statistics, concerns were raised regarding the reliance on quantitative data to inform decisions. These concerns, understandably, intensified as the assessments progressed, generating worries that a collection weeding initiative might result in the removal of specialized or unique materials from the library. To address these concerns, we strengthened our data triangulation by incorporating in-house usage statistics alongside traditional checkout data. This approach provided a more comprehensive understanding and helped alleviate apprehensions.

Summary of Findings

While all the feedback we received was essential to shaping the subsequent phases of the decision-making process, the student feedback provided a particularly clear and detailed understanding of their campus experiences and needs. Their responses, as expected, were centered around the aspects they considered most critical to their success. This feedback also highlighted the students' focus on practical needs for their daily campus routines. They emphasized which buildings were open longer and which offered access to functioning computers, printers, and comfortable seating. Many students described a day spent moving from one building to another, seeking spaces to wait for buses or classes.

All stakeholders took the students' concerns seriously; both librarians and administrators were keen to understand and address their priorities. The students' needs became a central driving force in the discussions about which space and collections should be prioritized. In addition to these student-driven concerns, other priorities emerged, including the creation of private spaces for consultations on sensitive matters such as financial aid application assistance; securing funding to support new space uses; developing creative and inclusive spaces; and reallocating underutilized areas for more efficient use.

Stakeholder Engagement: Building trust around assessment

As previously mentioned, USU Blanding was formerly part of the College of Eastern Utah, with its library managed from Price. After the merger in 2010, the connection between the two libraries was severed, and the considerable geographic distance—approximately three hours from Price to Blanding, and another three hours from Logan—meant that interactions between the two were infrequent. Additionally, Blanding's predominantly indigenous population and distinct academic and technical programs created notable cultural differences when compared to Logan.

Given the unique relationship between Logan and Blanding, we needed to navigate not only the geographical and logistical challenges, but also the cultural and historical contexts. There were

many competencies we had to develop to ensure that we were respectful, and that our assessments were both useful and culturally sensitive.

For these reasons, we adopted a scaffolded approach to assessment, which proved to be the most effective way to build stakeholder engagement and trust. Each phase of the assessment process naturally led into the next. For example, initial stakeholder needs evaluations informed ethnographic interviews, which in turn guided physical space assessments, followed by collections evaluations. After each phase, the research team presented our findings and recommendations for the next steps to the Blanding stakeholders—primarily the administration—while simultaneously planning for the next phase of assessment. Each meeting was an opportunity to reassess or confirm goals, timelines, available resources, and identify any new stakeholders who needed to be included in the process.

Communication: Campus Leaders and Library Staff

Given the relationship between the Logan campus and the Statewide Campuses, it is essential to maintain regular communication with campus administrators—not only to discuss the next steps in the project but also to confirm that they are still committed to moving forward. These check-ins also serve to reinforce our continued willingness to assist, make progress, and follow up, ensuring that the project remains a priority and is not forgotten. While it may never be the top priority, it must remain a consistent focus on our part.

Equally important is the involvement of library staff, as their on-the-ground knowledge of student space usage and stated needs is crucial to our evaluation process. If there are any shifts in campus culture or significant changes in student behavior, these must be considered. The staff's intimate understanding of daily operations and student needs is invaluable in ensuring that our assessments and recommendations remain relevant and effective.

Moving from well-intentioned to well-informed

At the core of our efforts to build relationships and trust was the deliberate engagement of multiple audiences to demonstrate our commitment to gathering as much relevant data as possible, in a purposeful manner aligned with our goals, and from as many stakeholders as we could.

Specifically, we aimed to:

- Consult with as many stakeholders as possible, while ensuring that student voices were given prominence.
- Use assessments to clearly identify and address needs.

It was important to remain vigilant about moments when anecdotes or assumptions began to shape the conversation. Several of our initial assumptions about their needs were problematic because they did not involve the students' voices directly. The students' concerns were far more pragmatic; they were focused on addressing basic needs, such as functioning printers. Our assumptions, in this case, inadvertently overshadowed the more pressing equity issues that were affecting students' day-to-day experiences, highlighting the need for a more student-centered approach to decision-making.

Moving away from assumptions—however well-intentioned—was a critical step toward ensuring that our approach was truly equitable. Assumptions, no matter how thoughtful, remain inherently inequitable if they do not actively involve the voices of the individuals we are seeking to support. Throughout the entire assessment process, both during and after, we remained vigilant about including students' voices at every stage—alongside the perspectives of local experts, such as the librarian with deep historical knowledge of the materials and the county's history.

As we analyzed and presented data from the various assessments, we made a deliberate effort to highlight student concerns. We emphasized the importance of ensuring that students felt welcomed in their spaces and had a sense of ownership. Given that the campus is situated on historically indigenous land, the focus on fostering a sense of welcome and ownership became even more significant. Crucially, however, we prioritized letting the students define what belonging and ownership meant to them—not what we believed it should look like.

By centering student voices and allowing them to articulate their needs and vision for their own space, we demonstrated our commitment to equity. This approach reassured the campus administration that we were upholding our initial promise and adhering to the operating procedures we established during the project management phase: we were not there to impose our ideologies, but to offer support and create a platform for the voices that would drive meaningful change.

A Humanistic Approach

Our community often focuses on how to use assessment in concrete ways to demonstrate impact and identify needs. However, it is equally important to consider the intangible, humanistic component of assessment. In other words, what impact do our assessment methods and approach have on the relationships we must cultivate to build trust around our work and analyses? This project has underscored the significance of recognizing this humanistic aspect of assessment and its implications for both students and stakeholders.

For instance, we brought our librarian perspective into a situation that held a different meaning for the students. Through extensive conversations with them about their needs and the possibilities within our resources, we empowered the students. Each time we visited the campus, they eagerly inquired about new furniture options for their library. In these interactions, we increasingly felt accountable to the students. Moreover, we observed that our assessment process had empowered them to directly voice their needs and desires to the campus administration. They began asserting themselves in broader campus space discussions.

In subsequent discussions, we reflected on how our advocacy, coupled with their growing self-advocacy, could potentially drive meaningful changes. This dynamic was further strengthened when supported by solid assessment data. We realized that the act of involving students in the assessment process not only gave them a sense of ownership over the outcomes but also instilled a belief in their ability to influence change within their own campus environment. This humanistic dimension of assessment ultimately reinforced the trust between stakeholders and highlighted the transformative potential of assessment when it goes beyond numbers to actively engage the community in shaping its future.

Next Steps

Currently, we are working to assist Blanding with a collections evaluation and weed with parallel goals of updating the collection to better serve students, remove outdated materials, and reorganize collections to maximize the limited floor space to improve student seating and furniture. Additionally, we hope to apply our scaffolded assessment process to other USU statewide campus to explore how the libraries can better integrate with non-residential campuses, which do not have physical libraries, to further student success.

The collections assessment is currently in an information-gathering phase with faculty and student surveys currently deployed. These surveys are part of a multi-step approach designed to involve all stakeholders in the process. We are starting the process with a faculty survey, as past experiences have highlighted the importance of informing and engaging faculty early in a "weeding" project. If word spreads that the library is removing materials without prior consultation, it can lead to unnecessary concern and false assumptions. The survey represents the first of several opportunities for faculty to engage throughout this process.

Additionally, when this process began years ago, the library lacked a written Collections Development Policy that would guide any weeding decisions or even articulate what were the library's collecting priorities. This gap has now been corrected with Blanding adapting the policy recently adopted by the USU Eastern library, which itself lacked such a policy until recently.

The goal is to begin the physical assessment of materials in mid-late 2025. This phase will lead to a combination of removing some books, moving some collections from the floor to compact

shelving, and assessing the immediate needs of books that need to be in main shelving. The project itself has targeted 2027 as a hopeful completion date.

Conclusion: Implications and value

The following themes emerged for us throughout the project:

Utilizing scaffolded assessments helps build relationships

All of these assessments resulted in multiple reports of recommendations and potential projects, broken down into smaller process, and "staged" for implementation. For example, we continued the scaffolding idea by breaking down a collection weeding process into more manageable pieces for a small team (e.g., first determine if they want to weed based on reclaiming square footage, reducing the collection by x%, or some other factor). More manageable, staged project processes were less daunting and more feasible for a library of their resource and staff size.

Stakeholder engagement is the key to success

When dealing with an interplay between collections and space changes, particularly in a familial institutional relationship without formal oversight, deep stakeholder engagement was absolutely paramount for success. Engaging stakeholders with the design of the assessment instruments helped ensure they had a "stake" in the outcome. Additionally, their participation helped them better understand how data were generated and collected, reducing concerns about validity.

A Humanistic Approach: Relationship building and nurturing

Relationship and trust-building was absolutely paramount when performing assessments. We didn't want the stakeholders to feel any amount of angst of threat, which is what can happen when any assessment is implemented.

Work with, not against

Working with, not against; listening, not overstepping; presenting options, not ultimatums; and approaching the process with a high-level goal in mind (to increase student success through spaces and curated collections) helped to ensure our assessment data were used for equitable decision-making.

Unbiased, well-planned, needs-based assessment

Data collected via structured, holistic, and well-designed assessments was key to convincing stakeholders to move forward with changes in addition to their participation in the design of the assessment instruments.

Our project as a whole utilizes the library as a vehicle to address critically unmet needs at a statewide campus that serves a large, underrepresented population. From a process perspective, our scaffolded assessment processes built strong relationships and trust where they were previously incredibly strained. Where stakeholders were previously wary of us and our intentions, our participatory scaffolded assessment processes helped build trust and ensured equitable participation throughout. Our processes also highlight that the primary goal was to work with local stakeholders to advance student success. By engaging all stakeholders in the process and implementing a well-defined, systematic assessment approach, we can create a more functional, accessible, and relevant library collection that takes into account defined needs.

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[1] As of this writing in December 2024, USU is assessing how Statewide is organized, and it is probable that it might change in the coming year.
[2] See: Connaway & Powell, 2010; Liamputtong, 2011; Wilkinson, 2004.
[3] See: Connaway & Powell, 2010; Henriksen, et al., 2022.