Proficiencies for Assessment Librarians and Coordinators: Defining a Profession

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Abstract

The Association of College & Research Libraries (ACRL) charged a task force with developing *Standards for Proficiencies for Assessment Librarians and Coordinators*. In a higher education environment with increasing accountability and diminishing resources, library administrators have responded by assigning assessment duties to librarians or creating assessment librarian positions to assess the value of the library and create a culture of assessment. The *Standards* describe the proficiencies assessment librarians need to be successful in their jobs.

The task force collected proficiencies by brainstorming, conducting a literature review, reaping assessment proficiencies from existing library standards, and surveying assessment experts in librarianship and in higher education. The task force applied card sorting techniques to categorize proficiencies.

The standards comprise 11 broad categories and 52 specific proficiencies. Categories include (1) *knowledge of assessment in libraries and higher education*, (2) *ethics*, (3) *assessment methods and strategies*, (4) *research design*, (5) *data collection and analysis*, (6) *communication and reporting*, (7) *advocacy and marketing*, (8) *collaboration and partnerships*, (9) *leadership*, (10) *management*, and (11) *mentoring, training, and coaching*.

The *Standards for Proficiencies for Assessment Librarians and Coordinators* allow academic libraries

to begin with a common definition of assessment librarian responsibilities. Proficiencies may be used to write job descriptions that define the duties of assessment librarians, assess performance and guide evaluation, and develop professional development programs. Ultimately, the *Standards* should help librarians demonstrate their library's value to the institution.

Task force members included: Mark Emmons (chair), Stephanie Alexander, Karen Brown, Alice Daugherty, Lisa Horowitz, JoAnn Jacoby, Carol Mollman, Megan Oakleaf, Terry Taylor, and Zoltán Szentkirályi.

Introduction

The Association of College & Research Libraries (ACRL) charged a task force with developing *Standards for Proficiencies for Assessment Librarians and Coordinators*. In response to a higher education environment with increasing accountability and diminishing resources, library administrators have assigned assessment duties to librarians or created assessment librarian positions in order to assess the value of the library and create a culture of assessment. The *Standards* describe the proficiencies assessment librarians need to be successful in their jobs. This paper describes the approach used by the task force to develop the proficiencies including (1) determining and dividing the scope of work; (2) synthesizing and collating findings; and (3) finalizing the *Standards* and describing ways in which librarians might use the proficiencies.

The Divergent Phase: A Generative Process

The task force began its work with a generative process designed to produce a large pool of potential assessment proficiencies. The task force broke into five subgroups, each led by a task force member and each responsible for a different task.

The following list explains the tasks completed by each subgroup:
- The *Best Practices* subgroup reviewed the literature for best practices in developing job proficiencies. Specifically, members in this subgroup aligned the task force's workflow and methodologies with similar successful processes found in the literature.
- The *Tacit Knowledge* subgroup analyzed the task force's own work as assessment librarians to produce a list of assessment proficiencies. Members created a combined profile of assessment proficiencies based on task force members' experiences with assessment as part of their own job expectations. Each task force member, even those not part of this subgroup, contributed to the overall document. This was a crowd-sourcing exercise and members were asked to only add to the profile without any deleting or removing of content, and no editing occurred until everyone had contributed.
- The *Literature Review* subgroup developed a list of competencies from a literature review. Due to the large quantity, literature was divided by subtopics that included papers and presentations from the Library Assessment Conference, papers from other library conferences or higher education conferences dealing with assessment, other articles and monographs focused on higher education, and articles and monographs within librarianship. The subgroup produced a list of over 40 citations and approximately 150 overlapping competencies. Citations from the literature review became the basis for the bibliography, with all members of the task force contributing citations for materials used.
- The *Survey* subgroup created and deployed an eight-question survey to a list of assessment experts in librarianship and within higher education. Survey participants were asked to rank short lists of assessment competencies following the five assessment proficiency areas in Oakleaf's *Academic Library Value: The Impact Starter Kit*,[1] which were (1) higher education context, (2) institutional context, (3) data, (4) collaboration, and (5) assessment.
- The *Standards* subgroup collected assessment proficiencies from existing professional standards. They compiled and analyzed library standards from the 11 ALA divisions. There were 22 documents identified as having some mention of assessment competencies.

Based on each group's work, a pool of proficiencies was created—some overlapping, some with similar wording across the groups, and some unique to the area researched by the group. The task force organized these results by defining proficiency categories, reviewing the grand list of all proficiencies, reducing the list, and refining the wording of proficiencies to represent each subgroup. This work of refining and categorizing the different wording encountered for various proficiencies in the literature, standards, and survey responses was the second phase of the process.

The Convergent Phase: Synthesizing Findings

Each of the data points gathered by each of these work groups described a proficiency, but the data varied widely and was not uniform. The task force brainstormed tools that might serve to categorize and classify the proficiencies. Members of the task force all had solid experience in assessment and methods for analyzing data. Potential strategies included affinity diagramming (a tool that groups ideas generated by brainstorming and organizes them into groupings based on their natural relationships), open card sorting (a usability tool in which users find patterns in information and organize ideas in categories that make sense to them), and Delphi card sorting (based on a method in which each participant reviews and revises the organization/structure designed by the previous participant).

After discussing the strengths and weaknesses of these approaches, the task force chose card sorting as the best tool for this purpose. The combined list of 260 items produced by the various groups was deduped by Emmons by removing identical or virtually identical items to produce a list of 234 items. This set of items was then fed to a card sorting software, OptimalSort, for use by the task force. Each task force member then did two card sorts, one manual, in which the data points were listed on "cards" that were cut out and arranged, and then in the software tool. In each case, task force members grouped cards and named categories for the groupings.

Emmons worked with the software, generating categories listings (grouping cards in the categories given similar names by the task force); a dendrogram[2] (a tree diagram with a hierarchy based on degree of similarity or number of shared characteristics), and a similarity matrix (a graphic form of expressing the percentage of times two items appear in the same category; e.g., verbal communication and written communication appear in the same category 100% of the time, while they appear with "demonstrate oral and written communication skills" only 87% of the time).

All task force members worked together to evaluate the various ways that the software had grouped the individual card sorts. In the end, the task force members' categories were merged, combined, and revised, resulting in eleven categories:

1. Knowledge of Assessment in Libraries and Higher Education
2. Ethics
3. Assessment Methods and Strategies
4. Research Design
5. Data Collection and Analysis
6. Communication and Reporting
7. Advocacy and Marketing
8. Collaboration and Partnerships
9. Leadership
10. Management
11. Mentoring, Training, and Coaching

Once the categories were defined, individual proficiencies were assigned to the new categories. The task force split into groups to work on each category, deduping, editing, and combining proficiencies. Each group created a document describing in greater detail the specific proficiencies in the areas assigned to that group. The challenge was to make each proficiency meaningful in itself as well as within the category, reflective of the different ways that each one had been identified, and able to be applied to a job description. Wording was selected so that specific skills and proficiencies could be properly interpreted and not vague in their meaning. The groups sought to represent each proficiency area comprehensively, so that no details from the prior phase of researching and soliciting input were left out.

As the categories indicate, some responsibilities and roles of assessment staff might include managerial aspects, which are not necessarily required in every assessment person. At the same time, leadership proficiencies are important in many aspects of assessment, regardless of managerial position. Disentangling other seemingly similar categories, such as *Research Design* from *Data Collection and Analysis,* or *Communication and Reporting* from *Advocacy and Marketing,* helped clarify both the proficiencies and the categories.

The documents created by each of the groups were then consolidated into a single comprehensive source of all wording that was discovered during the divergent phase. The entire task force again reviewed them. Was the language clear? Were there any duplicates? Were they parallel in how they portrayed each proficiency? Individuals re-edited various aspects of the proficiencies until the group agreed. They were ready to be shared!

Finalizing the Standards

The task force solicited feedback from library professionals on the completed draft standards. The document draft and a call for comments were posted on the web site of *College & Research Libraries News*. The task force compiled a list of relevant Listservs and sent out the call with a deadline of June 1, 2016. Emmons, as task force chair, compiled the comments into the standards draft and sent that back to the task force members who, in turn, provided their perspectives on the responses received from the user community. Some comments indicated that minor modifications to the language would be helpful or recommended changes to the title of the document. The task force had made a deliberate choice to focus on proficiencies rather than assessment librarian job titles, and many of the comments suggested a focus on specific specialties within assessment, such as collections or instruction, including the suggestion of additional resources for the bibliography.

Once the draft was revised to incorporate comments and/or clarifications, the final draft was submitted to the ACRL Standards Committee for approval on June 30, 2016. The *Standards for Proficiencies for Assessment Librarians and Coordinators* are available on the ACRL Guidelines, Standards, and Frameworks web page at http://www.ala.org/acrl/standards.

Conclusion

The ACRL *Standards for Proficiencies for Assessment Librarians and Coordinators* is a document that can provide academic libraries and assessment librarians with a number of practical benefits. The *Standards* offer a common definition of the job responsibilities of assessment librarians—one that librarians can use within their individual libraries to craft position descriptions, onboard new employees, guide professional development, and inform performance appraisals. The *Standards* can also be employed at a national level to guide capacity-building offerings provided by professional associations, develop communities of practice, and enhance library and information science curricula.[3] Once shared with the professional community, the *Standards* will serve as a document that defines and clarifies the work of library assessment professionals in the years to come.

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Endnotes

1. Megan Oakleaf, *Academic Library Value: The Impact Starter Kit* (Syracuse, NY: Della Graphics, 2012).

2. OptimalSort termed our work a "Skeptical Dendrogram" because there were only 11 of us participating. Their algorithm calls for at least 30 participants to remove the word skeptical.

3. Mark Emmons and Megan Oakleaf, "The ACRL Standards for Proficiencies for Assessment Librarians and Coordinators: A New Document to Support and Strengthen Assessment Efforts in Academic Libraries," *Journal of Academic Librarianship* 42, no. 5 (September 2016): 622–624, https://doi.org/10.1016/j.acalib.2016.07.006.