Building Library-Wide Engagement in Assessment from Scratch

Beth Martin, Anne Cooper Moore, and Rachael Winterling
University of North Carolina at Charlotte, USA

Introduction

In the space of three years (2013–2016), the UNC Charlotte's J. Murrey Atkins Library has moved from a lack of understanding of the concept of assessment to applying an assessment lens to all library activities. The "we know what the students need" attitude permeated the library. Decisions were subjective rather than data driven and there was an absence of data gathering and analysis to inform decision making. The library had expertise in the form of a usability assistant and an ethnographer, but their work was predominantly campus/ externally focused. Since the arrival of a new dean in the summer of 2015, assessment has become internalized into everything we do. Learning about and participating in assessment, usability, and ethnographic studies has helped faculty and staff embrace assessment. Now, we have a pervasive culture of asking what, why, and how. For example, why do students in Greek organizations sign a paper log when they come and go from the library? How can we accommodate students who need to bring their young children with them to the library when they study? What do veterans need from the library and what would help them study successfully? This paper will discuss how the J. Murrey Atkins Library is rapidly building a culture of assessment.

Past

Prior to 2013, the J. Murrey Atkins Library (Atkins) did not have a focus on assessment. Assessment activities were primarily directed outward—toward the campus and our sister schools. The library hired an ethnographer in 2009 who conducted research to rethink our space needs. As a result of her work, the ground floor was redesigned and four service points were consolidated into two. The ethnography project included observational research on students, but was not integrated into larger library strategic initiatives.

A few traditional library studies were performed. LibQUAL+® was conducted in 2003, but received little attention once the study was complete. The Measuring Information Services Outcomes (MISO) survey was performed in spring 2013, but the results were not analyzed immediately. Instruction assessment lacked coordination and integration with our strategic goals. The liaisons used the LibAnalytics tool to record consultations, but analysis was limited because of time constraints.

Data was gathered on an ad-hoc basis during accreditation, strategic planning, or budget cycles, and to respond to annual statistical surveys such as the Integrated Postsecondary Education Data System (IPEDS) and the Association of Southeastern Research Libraries (ASERL). Library departments and units maintained their own statistics and the library business manager compiled the data once a year and submitted the required reports. There was neither a centralized data gathering system in the library nor an operationalized plan to gather this data on a regular basis. The final reports were not shared with the library faculty and staff. The reports were not analyzed for trends that could inform budget requests or collection/service improvements.

While there were pockets of interest in assessing specific aspects of library services and support, assessment was not a priority. Assessment coordinator responsibilities were added to the job announcement for the head of access services to attract a specific candidate who was interested in assessment. The first assessment task assigned to the new head was to analyze the MISO data; however, the library as a whole showed little interest in the data beyond faculty satisfaction numbers. Since the assessment coordinator was responsible for circulation, reserves, collection maintenance, and interlibrary loan, she focused assessment efforts on these public services. For example, we expanded LibAnalytics to include our circulation service point to better understand what was asked at this desk and began analysis of ILL data to inform collection development processes. In addition, we strengthened the relationship between Access Services and Research and Instructional Services (RIS), which led to several collaborative studies such as mystery

shopping to enhance our customer service processes across all public service areas.

One of the librarians who worked in the Digital Scholarship Lab performed usability studies along with other technology functions in the library. In 2014 she brought in an intern to perform a comparative usability study on our discovery service and we were able to hire the intern full-time as a usability assistant. In addition to the discovery studies, the team tested the library website and the campus' online academic program and course approval system prior to the campus rollout.

The prevailing attitude toward assessment in the library was negative for several reasons. Both faculty and staff were skeptical that employees who did not have a library background could or should assess our services. A short-term administrative approach that charged library departments to use the services of the usability team exacerbated the disdain for assessment. Some team members felt that the library did not need anyone researching patron needs and that anecdotal evidence was sufficient to support major service initiatives. Some team members felt that the ethnography and usability employees were not supporting the library and as such were a drain on already tight resources throughout the organization. In addition, the word assessment had negative connotations as something that would be used punitively against employees in their performance evaluations.

In November 2013, these perceptions began to change with the addition of the head of access services and assessment coordinator (20% of her time) as well as the temporary housing of the Office of Assessment and Accreditation in the library. Positive, causal interactions between library staff and the pleasant staff of the Office of Assessment and Accreditation resulted in a more positive attitude toward assessment. The new usability assistant also began to have conversations with different library groups to explain what services she could offer. The assessment coordinator began to explore data visualization tools such as Tableau to help the library communicate its findings in new ways and began a data audit to determine where our data was stored, what should be kept, what should be centralized, and what we did not need to collect.

New Dean

A new dean arrived in June 2015 who was active in the assessment movement in ARL, in LLAMA, and in cocurricular and campus-wide assessment at her previous university. She was impressed with the dedicated assessment personnel (usability, anthropology, instruction, access services), but surprised that most of the assessment activities were conducted for other campus groups rather than focused on demonstrating library impact on students and their learning. While the staff dedicated to assessment functions were on the library budget and hired by and housed in the library, they worked exclusively on projects for other campus groups. The dean saw innovative technologies, services, collections, and facilities in the library, but limited research into their effectiveness, impact, and possible improvement. She could see that with planning, goals, structure, organization, participation, and coordination, the outstanding work taking place throughout the library could become recognized and valued across campus and lead to improved services and campus engagement.

Her first step was to volunteer the library to participate in campus-wide assessment efforts through the Academic Affairs Office of Assessment and Accreditation. She visited with the two leaders of the Office to explore how the library might get involved in campus efforts and to discuss our need to supplement existing metrics we gathered for traditional library reporting in order to demonstrate our impact on students. She attended several of the Office's professional development sessions to get an idea of the role and perception of assessment on campus. The Office proved to be an engaged ally. The library was added to the IRB approval for the National Survey of Student Engagement (NSSE) and obtained the full dataset to run comparison reports.

The next step was to add assessment to the strategic plan. The provost asked the new dean to engage the library in developing a strategic plan in the first six months she was on the job. This was a tall order, but the faculty and staff came together in several retreats to revise the mission and vision and create a list of values statements. A strategic planning committee was appointed to develop a plan that followed the new academic plan from academic affairs. We added "integrate assessment practices across the Library" to Goal 1 ("Educate a diverse student body through an integrated academic experience that positions graduates for personal success and civic responsibility in the global environment of

the 21st century") of the academic plan. Assessment permeated our own strategic plan as well.

The dean thought it was important to begin a new era of assessment in the library with a quick standardized assessment to serve as a conversation starter, so we conducted LibQUAL Lite in fall 2015. This was the first project of the Assessment Committee under the leadership of our head of access services who would soon become our head of assessment. LibQUAL was last administered in the library in 2003. While the results were typical of most academic libraries and the response rate (5%) was disappointing despite efforts to engage the audience, it provided a baseline of data and a way to explain assessment principles to the library faculty and staff.

The Assessment Committee included those who held assessment-related positions, representatives from throughout the library who collected data for annual reports, and a couple of volunteers who were interested in learning about assessment and helping improve services. It is important to note that the Assessment Committee was established as part of a process to establish a committee structure to perform a variety of important functions across the library, including: art, exhibits, and displays; communications, marketing, and signage; outreach, external programming, and events; staff development and activities, etc. Creating library-wide committees engaged the entire library in ongoing work systematically and made it easier to organize new policies, procedures, and ways of thinking around a variety of important functions, including assessment.

The next step was to create a position that was dedicated to coordinating the library assessment program. Luckily, the associate university librarian for collections access and outreach services had the foresight to hire a librarian fascinated with and committed to assessment as the head of access services. In conversations with this high-energy, natural leader, it was evident that she was so passionate about assessment and visualization that she dreamed of devoting her career to it. The solution for how to form a dynamic, assessment program was in our midst. Unfortunately, she had to perform double-duty for at least six months while we reorganized the library and hired a replacement for her previous position.

And part of the reorganization of the library included pulling those dedicated to assessment from other departments under the head of assessment to form a new unit. The unit included the ethnographer who had previously reported directly to the dean, the usability assistant who was upgraded to usability coordinator and transferred from digital initiatives, and an assessment assistant who was moved from access services because of an interest in assessment. So we suddenly went from a disorganized, outward-facing assessment effort to a dedicated unit that took a team approach to assessing library activities supported by a library-wide committee to assist with execution and to help develop buy-in across the library. It took even longer to reseat the team together, but now they are nearby one another in the administrative area and love it!

We continued our efforts to engage with campus assessment efforts and the head of assessment was appointed to the academic affairs assessment team. Members of the library assessment team worked on assessment activities with other campus groups to develop library services to support specialized populations, such as veterans, students with young children, Greeks, disabled, etc.

One of the most fruitful efforts of the assessment team was developing a Student Library Advisory Board (LAB) with the Student Government Association, which provided dozens of suggestions from students on what services, spaces, resources, and technologies they wanted from their library. Now in its second year, LAB gives us a to-do list of improvements, but they are beginning to move towards lobbying the campus for funding for initiatives they care about such as 24/7 (rather than 24/5) hours and new study room furniture.

Present
The library had to distinguish between the assessment team and the committee as there was some concern about duplicating work. The assessment team carries out research, advises partners on appropriate research methods and tools, and helps analyze and communicate findings. The Assessment Committee discusses the assessment needs of the library and potential projects and ensures that our assessment projects align with the missions, visions, and strategic plans of the university, academic affairs, and the library. They also coordinate the annual statistical reporting, which had formerly been conducted by

the business manager. The focus of the committee shifts depending on changing library activities and priorities. The committee is comprised of employees from every department in the library.

Assessment requests have increased since the inception of the team—the more we do, the more we are asked to do or participate in more projects. For example, when a liaison is working on a new service or project, s/he will often include an assessment member during the planning process to ensure that assessment is a part of the project. Employees can request assessment projects through our project center, our homegrown digital ticketing system. Project center allows the team to track projects and produces a year-end report for the project lead and for the team. Library personnel have a greater understanding of assessment since the team has presented a number of brown bags on such topics as usability, project management, ethnography, and active learning. The assessment team provides updates on projects at our monthly all-staff meetings, so others can understand what we are doing and how it can help in a variety of situations. In addition, the assessment team has an open-door policy, so anyone can come in and ask questions at any time.

We have a wide variety of projects currently underway in the assessment unit. We are using tools such as Tableau and Gephi to help the library visualize data and communicate research findings. We are working with the Office of Adult Students and Evening Services, Greek Life, Veterans Affairs, and the Center for Graduate Life to better understand the needs of these populations and determine how the library can better serve them. In addition, we are working with Student Affairs to explore the broader impact of the library on retention and graduation, as well as our impact on student engagement. Usability studies are continuous to ensure efficiency, functionality, and desirability of the library's physical/digital services. For example, we conducted several usability studies to guide the redesign of the library website in 2016 and continue to test and improve the site during its lifecycle.

The head of assessment is currently working as visiting program officer on the ASERL new metrics project. The goal of this three-year project is to develop a toolkit for libraries to communicate their stories using existing data in new ways.

Future

A major initiative at J. Murrey Atkins Library is to engage with the greater Charlotte community because it is part of the university's mission statement:

> UNC Charlotte is North Carolina's urban research university. It leverages its location in the state's largest city to offer internationally competitive programs of research and creative activity, exemplary undergraduate, graduate, and professional programs, and a *focused set of community engagement initiatives*. UNC Charlotte maintains a *particular commitment to addressing the cultural, economic, educational, environmental, health, and social needs of the greater Charlotte region*.

The library is not known off-campus at all. We have unique collections, exhibits, events, and facilities that are open to the public. Given the mission, we need to engage with the community, share what we have, and determine what services they need from us. We want to attract them to enjoy our events, our collections, and our facilities. We know we need to have exhibits and activities that will bring them in and then assess what they want from us. We are beginning by engaging with the Charlotte Mecklenburg Library and looking for mutual digitization opportunities for related collections, participating in their speaker's bureau, and joint services. Once we get going, we will engage with the contacts to see what grabs their interest and build on it.

Future plans for the assessment committee include reviewing our data life cycle to ensure that we are storing what we need and eliminating outdated statistics. In addition, we will be proactive in meeting our strategic goals and help craft new goals as the need arises.

We also have a liaison who is very interested in assessment and serves as a dedicated liaison to our department. Her motivation offers an exciting opportunity that enables us to train others in assessment methodologies and best practices. The appointment of a liaison to research and instructional services solidifies the relationship between assessment and the primary communication conduit with faculty and academic departments and strengthens a formerly weak link to assessment.

We are observing an increase in new requests for assessment projects within the library and hence prioritizing projects has become important. We are also returning for follow-up evaluations of services and projects we already conducted. These opportunities combine to help us realize our vision to institutionalize ongoing assessment and improvement of our library services, collections, technologies, and spaces.

Our future goals include building a business intelligence system that will provide library leaders and team members the ability to access data at their point of need. The team will provide dashboards, data analysis, and assessment support, so the library can make data-driven decisions. The team is integrating data sources within the library and in conjunction with our campus partners. Our goal is to create a holistic picture of student success across myriad data points. Atkins can also use this data to better narrate our story in a way that illustrates the integral part we play in student success.