Automating Cornell University Library's annual data collection using LibPAS

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2012 Library Assessment Conference

Opportunities

- Customizable, decentralized reporting.
- Chance to review and rethink everything, involving others.
- Chance to build goodwill.

Challenges

- Large, complicated organization with changing needs.

Conceptual shifts

- Data available immediately to all users.
- More emphasis needed on usability for end users.
- A greater opportunity and need to focus on the consistency of data elements over time.

Cornell University

Key decision points

Preliminaries:
- Who is responsible?
- How should the hierarchy for reporting locations be set up?
- How often will data be collected, and at what location level?
- Which measures should be included? Which dropped?
- How many retrospective years will be input?

Measure collections:
- Is there any data that should not be available to all staff?
- Within collections, how will measures be grouped, ordered and named?
- Should all measures be summed during roll-up?
- Where should overarching data notes be recorded?

User access / Collecting data:
- Who should have access?
- How many data input forms are needed?
- How will data collected centrally from online systems be added?
- Will you make corrections in previous years' data?

Reporting / Training:
- How should staff be trained?
- How do you indicate that data is still in draft?
- Which report templates should you make available to end users?

Key recommendations

- Start well in advance of the target implementation date. Allow time for usability testing.
- Learn all key system functionality up front (on a smaller scale) to aid in set up decisions. Create a test collection.
- When creating the location hierarchy, consider how you will report data out most often. Create additional levels when units share multiple measures. Balance power with ease of use.
- Have one retrospective year input for the first data collection.

- Keep naming and measure order conventions consistent, and as helpful as possible to users.

- Exceptions will require extra measures. Make sure you need them.

- Set input access rights w/ unit heads.
- Import centrally collected data into LibPAS yourself, saving files.
- Train staff before giving them reporting rights.
- Create a supporting online portal for data providers and users.

Where we are now

- Quick, customizable reporting, from any computer, with 5 years of data.
- Data providers happier. Offering training for ad hoc reporting annually.
- Multiple reports created for different audiences: longitudinal, institutional level Excel report publicly available for external audiences; and unit-specific LibPAS trend and % change reports in portal for library staff only.

- Reporting cheat sheets and filterable file of data notes for staff at portal.