Creating an Assessment Plan & Data Inventory: Aligning & Managing Success Metrics

Dr. Starr Hoffman
Director, Planning & Assessment
University of Nevada Las Vegas (UNLV) Libraries
Today’s Learning Outcomes...

- Design effective outcome metrics for library goals...
- Organized in an assessment plan...
- ...and describe & track them in a data inventory.
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- Design effective outcome metrics for library goals...
- Organized in an assessment plan...
- ...and describe & track them in a data inventory.

A very brief introduction!
Agenda

Part 1: Creating an Assessment Plan
- Plan to your purpose
- Identifying stakeholders
- Scoping your plan
- Planning outcome metrics
- Staging assessment activities
- Organizational buy-in
- Strategies for alignment

Part 2: Creating a Data Inventory
- About data inventories
- UNLV’s Data Framework
- Purpose & common data issues
- Stakeholders
- Software / tools
- Gathering the info (data audit)
- Getting it done (timeline)
- Keeping it updated
Key Resources


Assessment Plan Outline Worksheet

Inventory Planning Worksheet

Data Audit Question Worksheet

Data Inventory Worksheet

UNLV Data Inventory Example

- Data inventory (Google Sheet) pre-populated with examples
- Includes UNLV’s “uniform statistics” data points
- Includes ACRL survey data points (may need updating annually)
Part 1: Creating an Assessment Plan
What does an “assessment plan” LOOK LIKE?
<table>
<thead>
<tr>
<th>Library Open House</th>
<th></th>
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</thead>
<tbody>
<tr>
<td><strong>IL Student Learning Outcomes</strong></td>
<td></td>
</tr>
<tr>
<td>1. Students will be able to find various locations in the library, as well as the Writing Center and TLC HelpDesk.</td>
<td></td>
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<tr>
<td>2. Students will be able to find assistance at the library, when needed.</td>
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<tr>
<td><strong>Type of Assessment</strong></td>
<td>Open House Feedback &amp; Questions Survey</td>
</tr>
<tr>
<td><strong>Description of Assessment</strong></td>
<td>Respondents are asked what they liked and didn't like about the Open House, any suggestions for improvements, and what, if any, questions they still have about the library and/or its services. With the IL Student Learning Outcomes focusing on students being able to navigate the library and its services, particular attention is paid to any responses on these topics. All responses are discussed by the Library Director, Assessment Coordinator, and Outreach Services Librarian before the next Open House and adjustments are made as needed.</td>
</tr>
<tr>
<td><strong>Responsibility</strong></td>
<td>Library Assessment Coordinator</td>
</tr>
<tr>
<td><strong>Distribution of</strong></td>
<td>Library Director; Outreach Services Librarian; Provost; L &amp; T Committee, Board of Trustees</td>
</tr>
</tbody>
</table>
Assessment Plan

Student Information Competence Outcomes

The following skills are based on the Information Literacy Competency Standards for Higher Education (Association of College and Research Libraries, 2000), which are the basis of our Information Competence Program and Research, Instruction and Outreach Services.

Students will be able to:

1. Determine the nature and extent of the information needed, for example:
   - Identify keywords or subject terms that describe the information need;
   - Differentiate between popular vs. scholarly, specific vs. background, and primary vs. secondary sources of information;
   - Define or modify the information need to achieve a manageable focus.

2. Access needed information effectively and efficiently, for example:
   - Recognize the type of information source needed;
   - Construct a search strategy using appropriate commands and keyword or subject terms for the information retrieval system, including Boolean logic, truncation, and limiters;
   - Recognize when search strategies have to be refined;
   - Retrieve information online or in person using a variety of methods, such as:
     - Online catalogs
     - Periodical databases
     - Classification schemes
     - Inter-library loan/document delivery services

3. Evaluate information and its sources critically and incorporate selected information into his or her knowledge base and value system.

4. Individually or as a member of a group, use information effectively to accomplish a specific purpose, for example:
   - Develop a product or performance to communicate the results of research (annotated bibliography, research paper, class presentation, portfolio, etc.)

5. Demonstrate understanding of the many economic, legal, and social issues surrounding the use of information, and access and use information ethically and legally, for example:
   - Recognize plagiarism;
   - Recognize the need for and how to authenticate into the library's online resources;
   - Cite sources using a consistent documentation style.
# Research & Learning Services

**Assessment Goal**

For 2016-2017, Research & Learning services will report statistics on such areas as instruction sessions taught, references transactions, etc.

**Assessment Measures**

<table>
<thead>
<tr>
<th>Service</th>
<th>FY 15-16</th>
<th>FY 16-17</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Staffed Library Service Points</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Number of Weekly Public Service Hours</td>
<td>97</td>
<td>97</td>
</tr>
<tr>
<td>Number of Reference Transactions (Total)</td>
<td>1,554</td>
<td>1,792</td>
</tr>
<tr>
<td>Number of Virtual Reference Transactions</td>
<td>1,356</td>
<td>1,453</td>
</tr>
<tr>
<td>Number of Presentations to Groups</td>
<td>195</td>
<td>200</td>
</tr>
<tr>
<td>Number of Total Participants in Group Presentations</td>
<td>4,609</td>
<td>4,241</td>
</tr>
</tbody>
</table>

**Poster: (based on fall 2016 exit slip data)**

*Assessing the Value of Library Instruction Using Qualtrics Survey Software (Assessment as Research Symposium, UC Merced 2017)*

- over 95% of students felt comfortable contacting their library instructor
<table>
<thead>
<tr>
<th>Library Goal and Assessment</th>
<th>Timeline</th>
<th>Measure</th>
<th>Projected Assessment Results/Student Learning Outcomes</th>
<th>Analysis of Results</th>
<th>Projected Cycle/Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Teach students, through formal and informal opportunities, information literacy and information management skills.</td>
<td>Spring 2014</td>
<td>Rubric developed for 100 level courses will be re-used- emphasis on citing correctly</td>
<td>To be set by Info. Lit. committee and OPIE</td>
<td></td>
<td>This is the third phase of a three-phase study. 200 level assessment will be designed for spring 2014.</td>
</tr>
<tr>
<td>Instruct and assess 200 level courses that attend library information literacy instruction.</td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>2. Promote the college community’s effective access to the library’s print, electronic and media information resources</td>
<td>Web committee: Fall 2013- FT &amp; PT faculty survey. Focus group of students on each campus</td>
<td>Analysis of student focus groups and faculty survey Data collection of visits to library website</td>
<td></td>
<td></td>
<td>Students and discipline faculty will be surveyed every 3 years</td>
</tr>
<tr>
<td>Does Redesigned library webpage meet the needs of students and faculty?</td>
<td></td>
<td></td>
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</tbody>
</table>
Office of Academic Assessment

Curriculum map showing which courses will address which learning outcomes.

<table>
<thead>
<tr>
<th>Course</th>
<th>SLO 1</th>
<th>SLO 2</th>
<th>SLO 3</th>
<th>SLO 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>First-year seminars</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>English 102</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Sophomore/junior courses</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Senior-level courses</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
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</tbody>
</table>

Which learning outcomes will be assessed in each cycle year (i.e., assessment timeline)? How will the learning outcomes be assessed?

- 2015: Assess outcome #3 in first-year seminar instruction sessions by a) identify the types of information they would find on a particular topic. The about the information lifecycle and how new information is produced, and write a short reflection about the information available on their own research topic assigned by the instructor and librarian.
- 2016: Assess outcome #1 in English 102 by looking at topics students write research papers and evaluating topics for appropriate scope and feasibility, developed in 2014.
- 2017: Assess outcome #2 in senior-level courses in two ways: 1) collect work from capstone courses, examine work for an assessable outcome multiple assignments, develop/review a rubric that assesses that our rubric to student work. 2) Though the courses will be increasingly directed work to develop a classroom assessment technique to use in library instruction.

<table>
<thead>
<tr>
<th>Student Achievement</th>
<th>Goals / Initiatives</th>
<th>Key Measures of Success</th>
<th>User Satisfaction Survey (2012)</th>
<th>Other Assesments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Expand co-curricular programs to graduate and undergraduates in support of academic achievement, life skills and lifelong learning.</td>
<td>Student retention, progression, and completion is impacted by library efforts.</td>
<td>U 6-10: Please indicate your level of agreement with... the library contributes to my academic success.</td>
<td>RPC group / GWLA study data.</td>
</tr>
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University Undergraduate Learning Outcomes (UULO) assessed

- Our program outcomes are all closely related to the second UULO: Informed thinking.

Plan for sharing the assessment results and acting on them (i.e., closing the assessment cycle).

Based on results of these assessments, we will focus our lesson plans on instructors on the demonstrated needs of students. We will share assess internally through the assessment office. The results of these assess the our internal curriculum map and provide more information about what students at strategic points in the undergraduate curriculum. By examining the curriculum assessment artifacts in first-year seminars, English 102, mile, culminating experiences, we will be able to revisit our original learning necessary, make revisions. Finally, librarians involved in instruction can these assessments to engage in reflective practice regarding their own discipline-specific learning.

<table>
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<tr>
<th>Additional colleges and departments utilize direct instruction.</th>
<th>G11-3: How satisfied are you with... reference, instruction, and consultation services?</th>
<th>Post-instruction assessments (short in-class surveys), Rebeccarda as instructional attendance and later library use?</th>
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<tbody>
<tr>
<td>N/A</td>
<td>F-18: Have you participated in a library-sponsored faculty institute?</td>
<td>Compare the number of faculty participating in assignment design consultations.</td>
</tr>
<tr>
<td>N/A</td>
<td></td>
<td>Compare the number of faculty participating in assessment design consultations.</td>
</tr>
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</table>
Who plans the plan?

● Single person or unit

● Group with cross-representation

● Entire organization
  ○ Parts of plan “owned” & created by different library units
What’s the purpose of your plan?

- Measure strategic progress
- Evaluate departments
  - Efficiency
  - Effectiveness
- Specific project or activity
  - For improvements
  - Decision-making
- External reporting
- Demonstrate impact
- Campus-wide reporting
  - Goal progress
  - Campus-wide assessment practice
- Budget justification
- Support decision-making
Go to the URL at the left. Download the documents. Open the Assessment Plan Worksheet.

At the top of the worksheet, write the PURPOSE of your plan at the top.

This will help you focus on the end-goal as you craft your assessment plan.
What’s your assessment plan FOR?

What’s its PURPOSE?
Identifying stakeholders for your assessment plan

Brainstorm names and positions:

- Org. charts (library & institution)
- Key groups, committees
- External reporting, consortia
- Reports
- Meeting minutes, other docs

Also: open call for interested people.
What’s the scope of the plan?

- Focused
- Limited sub-set
- Library-wide
  - Representative sample
  - Strategic goals
Library-Wide Planning

- Start with library goals
- Determine measures of success
- Method to obtain that measure
- Align these in one place
  - Add individuals & roles
  - Provides overall picture
- Get feedback at various levels

#GOALS
University “Top Tier” Goal

Libraries’ Strategic Plan: Corresponding Goal

Libraries’ Strategic Plan: Supporting Objectives

Libraries’ Strategic Plan: Measures of Success

Division Initiatives -> Assessment Plan
University “Top Tier” Goal

Libraries’ Strategic Plan: Corresponding Goal

Libraries’ Strategic Plan: Supporting Objectives

Libraries’ Strategic Plan: Measures of Success

Division Initiatives -> Assessment Plan

UNLV’s Top Tier Goal: Student Achievement

UNLV will be a national leader in education and will promote excellence in teaching undergraduate, graduate and professional school students. We will recruit, retain and graduate a diverse body of motivated students through the strength of our innovative learning experiences, access to measuring and research opportunities, and our vibrant campus community. Our highly qualified student, doctoral students, and professional students will bring back themselves and UNLV through their contributions to research, the profession, and the arts.

University Libraries collaborate broadly to ensure student achievement through direct instruction, partnering with faculty on assignment design and development of learning experiences outside the classroom.

- Embed library instruction and other library instructional interventions throughout general education courses: first year seminars, second year seminars, and information and capstone courses.
- Create learning opportunities for faculty to partner with librarians on course and assignment design with specific focus on upper-division courses.
- Library liaisons contribute to graduate student success as researchers and instructors through workshops and collaborations with the Graduate College.
- Expand opportunities for graduate and undergraduate students to learn in the Libraries to develop deeper research experiences and opportunities for scholarship.
- Expand co-curricular programs to graduate and undergraduate support of academic achievement, life skills, and lifelong learning.
- Offer specialized workshops for faculty that support research, teaching, and learning.

Key Measures of Success

- Student retention, progression, and completion is influenced by library efforts.
- Student success is impacted by the Libraries’ co-curricular programs.
- The number of direct instruction seminars for the four levels: first year seminars, second year seminars, and information and capstone courses are proportional.
- Additional colleges and departments utilize direct instruction.
- Graduate and undergraduate students value their direct instruction sessions.
- More faculty participate in assignment design.
- Faculty from more departments participate in assignment design.
- Faculty are satisfied with the assistance of embedded library partners in the development of their assignments and courses.
- Faculty are influenced by embedded library partners in the development of their assignments and courses.
- Faculty value library instruction sessions for their students.
University “Top Tier” Goal

Libraries’ Strategic Plan: Corresponding Goal

Libraries’ Strategic Plan: Supporting Objectives

Libraries’ Strategic Plan: Measures of Success

Division Initiatives -> Assessment Plan

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University Libraries collaborate broadly to ensure student achievement through direct instruction, partnering with faculty on assignment design and development of learner experiences outside the classroom.

- Embed library instruction and other library instructional interventions throughout general education courses: first-year seminar, second-year seminar, and targeted courses.
- Create learning opportunities for faculty to partner with Libraries on course and assignment design with specific focus on inter-disciplinary courses.
- Library liaison contribution to graduate and undergraduate student success in research and instruction through workshops and collaborations with the Graduate College.
- Expand opportunities to graduate and undergraduate students to train in the Libraries to develop deeper research experiences and opportunities for scholarship.
- Expand co-curricular programs to graduate and undergraduate students in support of academic achievement, life skills and lifelong learning.
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- Faculty are influenced by embedded library partners in the development of their assignments and courses.
- Faculty value library instruction sessions for their students.
UNLV's Top Tier Goal: Research, Scholarship and Creative Activity

UNLV will foster a climate of innovation in which faculty and students produce high quality, widely disseminated and influential research, scholarship and creative activities.

University Libraries contributes throughout the research lifecycle, from identification of opportunity to dissemination of results.

- Strengthen investment in the Libraries’ diverse and multi-format collections to production of high quality, widely disseminated, and influential research, scholarship and creative activities.
- Optimize data discovery, interaction and reuse through services and tools.
- Provide integrated support of knowledge and scholarship production in the digital environment through provision of dedicated spaces, innovative tools and skilled assistance for researchers.
- Provide dedicated databases and training to assist researchers in identifying grant opportunities as well as interdisciplinary partners.

**Key Measures of Success**

1. Faculty and students judge library collections as sufficient for their research needs.
2. Faculty judge library collections as sufficient for curricular needs.
3. Library staff programs and priorities are informed by the research lifecycle, and are communicated to UNLV researchers.
4. UNLV researchers are aware of and understand how the Libraries can support their research through specific services, tools, and resources.
5. UNLV researchers have an increased understanding of scholarly communication and are able to make informed choices about the dissemination of their scholarship.
6. More unique, regional content is made available online.
7. More use of unique, regional content.
8. Faculty, graduates and undergraduates value the Libraries’ contribution throughout their individual research process.
9. More faculty, graduates and undergraduates participate in individual research consultations and group workshops.
10. Faculty, graduates and undergraduates are satisfied with individual research consultations and group workshops.
11. Library faculty continue to apply standards of quality and impact in various peer review processes of scholarship.
12. Submit additional library grants.
13. Receive more funding from library grants.

| Goals / Initiatives | Key Measures of Success (Outcomes) | Related Ithaka Questions | Use Case
|---------------------|-----------------------------------|--------------------------|---------|
| Research, Scholarship and Creative Activity | Strengthen investment in the Libraries’ diverse and multi-format collections to enable the production of high quality, widely disseminated, and influential research, scholarship and creative activities. | Ithaka Faculty MR5: Overall, how would you rate your library’s... Collection of research-related materials or content? (1-7 scale) | U 6-5 / Q9-5 resources (meet my core needs) 
G11 / F13: How online resources (11-4; 13-7) | N/A |
<p>| | Faculty and students judge library collections as sufficient for their research needs. | | | |
| | Strengthen investment in the Libraries’ diverse and multi-format collections to enable the production of high quality, widely disseminated, and influential research, scholarship and creative activities. | | | |
| | Faculty judge library collections as sufficient for curricular needs. | | | |
| | Optimize data discovery, interaction and reuse through services and tools. | | | |
| | Identify opportunities to advise and assist faculty with complex data management plans and with meeting compliance for deposit of research output, including data, findings and articles into an open access repository. | Library staff programs and priorities are informed by the research lifecycle. | | |
| | Increase and enhance the online delivery of unique, regional primary sources to support scholarship worldwide about the region. | More unique, regional content is made available online. | | | |</p>
<table>
<thead>
<tr>
<th>Goals / Initiatives</th>
<th>Key Measures of Success (Outcomes)</th>
<th>Related Ithaka Questions</th>
<th>User Satisfaction Survey</th>
<th>Other Assessments</th>
</tr>
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<tbody>
<tr>
<td><strong>Research, Scholarship and Creative Activity</strong></td>
<td></td>
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</tr>
<tr>
<td>Strengthen investment in the Libraries’ diverse and multi-format collections to enable the production of high quality, widely disseminated, and influential research, scholarship and creative activities.</td>
<td>Ithaka Faculty MR6: Overall, how would you rate your library’s... Collection of research-related materials or content? (1-7 scale)</td>
<td>U 6-5 / G9-5: The library’s collection resources (books, journals, online resources) meet my course and research needs. (SEPARATE RESEARCH FROM COURSE NEEDS)</td>
<td>G11 / F13: How satisfied are you with... library online resources (11-5, 13-0), print collections (11-4, 13-7)?</td>
<td></td>
</tr>
<tr>
<td>Faculty and students judge library collections as sufficient for their research needs.</td>
<td>Ithaka Faculty MR7: How would you rate your library’s... collections of teaching-related materials or content? (1-7 scale)</td>
<td>U 6-5 / G9-5: The library’s collection resources (books, journals, online resources) meet my course and research needs. (SEPARATE TEACHING FROM RESEARCH, DIFF Qs)</td>
<td></td>
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<tr>
<td>Strengthen investment in the Libraries’ diverse and multi-format collections to enable the production of high quality, widely disseminated, and influential research, scholarship and creative activities.</td>
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<td>Faculty judge library collections as sufficient for curricular needs.</td>
<td></td>
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</tr>
<tr>
<td>Optimize data discovery, interaction and reuse through services and tools.</td>
<td>N/A</td>
<td>N/A</td>
<td></td>
<td>List newly-acquired databases and tools for locating/using datasets. List any new services developed to support data discovery or use. (Revisit after Research Planning Committee plan is final.)</td>
</tr>
<tr>
<td>Identify opportunities to advise and assist faculty with complex data management plans and with meeting compliance for deposit for deposit of research output, including data, findings and articles into an open access repository.</td>
<td>N/A</td>
<td>N/A</td>
<td>[Part of the Research Planning Committee’s plan...?]</td>
<td></td>
</tr>
<tr>
<td>Library staff programs and priorities are informed by the research lifecycle.</td>
<td>N/A</td>
<td>N/A</td>
<td></td>
<td>After Research Planning Committee’s lifecycle is complete, compare it to library services, etc. Connect library-offered workshops, instruction, services (other?) to specific points on the research lifecycle.</td>
</tr>
<tr>
<td>Increase and enhance the online delivery of unique, regional primary sources to support scholarship worldwide about the region.</td>
<td>More unique, regional content is made available online.</td>
<td>N/A</td>
<td>N/A</td>
<td>Special and digital collections data -- new collections (compare current cycle to previous).</td>
</tr>
<tr>
<td>Goals / Initiatives</td>
<td>Key Measures of Success</td>
<td>User Satisfaction Survey (2012)</td>
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<td><strong>Student retention, progression, and completion is influenced by library efforts.</strong></td>
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<td>RPC group / GWLA study data.</td>
<td></td>
</tr>
<tr>
<td>Expand co-curricular programs to graduate and undergraduates in support of academic achievement, life skills and lifelong learning.</td>
<td>Student success is impacted by the Libraries’ co-curricular programs.</td>
<td>N/A</td>
<td>Rosan has co-curricular strategic plan on impact; Rosan &amp; Starr mapping well activities fulfill the plan. SELG student data, peer mentor program. Co-Survey in fall 2016 for graduate/undergraduate. [future: RPC data correla</td>
<td></td>
</tr>
<tr>
<td>Expand opportunities for graduate and undergraduate students to intern in the Libraries to develop deeper research experiences and opportunities for scholarship.</td>
<td>The number of direct instruction seminars for the four levels: first year seminars; second year seminars; and milestone and capstone courses.</td>
<td>N/A</td>
<td>Compare # of internships and fellowships (RED, special collections) to presentations (collaborative) with interns. Include SELG data on wha</td>
<td></td>
</tr>
<tr>
<td>Embed library instruction and other library instructional interventions throughout general education courses; first year seminars; second year seminars; and milestone and capstone courses.</td>
<td></td>
<td>N/A</td>
<td>Compare instruction sessions held for each of these levels. Concentrate on instruction. (DF data–Starr)</td>
<td></td>
</tr>
<tr>
<td><strong>Additional colleges and departments utilize direct instruction.</strong></td>
<td></td>
<td><strong>N/A</strong></td>
<td>Compare counts of colleges/depts. requesting instruction to previous cycle.</td>
<td></td>
</tr>
<tr>
<td>Graduate and undergraduate students value their direct instruction sessions.</td>
<td><strong>G11-3: How satisfied are you with... reference, instruction, and consultation services?</strong></td>
<td>Post-instruction assessments (short in-class surveys), Rebelcard scanned instructional attendance and later library use?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>More faculty participate (in) assignment design.</td>
<td><strong>F-18: Have you participated in a library-sponsored assignment design?</strong></td>
<td>Compare the number of faculty participating in assignment design to previous consultations?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Faculty from more departments</td>
<td></td>
<td></td>
<td>Compare the number of departments participating in assignment design</td>
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<tr>
<td>Research &amp; Scholarship</td>
<td>Divisions Involved</td>
<td></td>
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<tr>
<td>-------------------------------------------------------------</td>
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<td></td>
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<tr>
<td>Submit additional library grants.</td>
<td>Assessment / Admin</td>
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<tr>
<td>Receive more funding from library grants.</td>
<td>Assessment / Admin</td>
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<td><strong>Student Achievement</strong></td>
<td>RED; Admin</td>
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<td>Student retention, progression, and completion is influenced by library efforts.</td>
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<tr>
<td><strong>Community Partnerships</strong></td>
<td>SC, Admin</td>
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<tr>
<td>Community members express the value of the Libraries' programs and events in their own words.</td>
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</tr>
<tr>
<td>Participation in library events provides more library friends and donors.</td>
<td>Admin, Assessment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create intellectual and cultural exhibits and events to educate and entertain the UNLV campus and the broader community.</td>
<td>SC, Admin, Assessment</td>
<td></td>
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<tr>
<td><strong>Infrastructure</strong></td>
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<tr>
<td>Users value 24/7 access to collections and services.</td>
<td>Admin, Tech, Assessment</td>
<td></td>
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<tr>
<td>Users heavily utilize library</td>
<td>Assessment, Admin</td>
<td></td>
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</table>
Planning Assessment: Goal Alignment

- How to measure change in attitudes, behavior, culture...
- What's the purpose of the goal?
Planning Assessment: Goal Alignment

- Who is the **audience**—how can you communicate **value**?

- If you succeed, what **impact** will it have?
  - **Start** with the statement you want to make:
  - “**We impacted student learning by teaching X students in Y total instruction sessions, reaching Z% of the freshman class.**”
Planning Assessment Activities

● Be sure the assessment is:
  ○ Usable
  ○ Realistic
  ○ Sustainable (potentially)
Start with Analysis

- What should the **results** look like?
- Match assessment size to project scope
- Quantitative vs. Qualitative
- Look for examples:
  - LIS literature
  - List-servs
  - Existing surveys / tools
Staging Assessment Activities

- Timeframe: be realistic
- Build in extra time
- Consider staff schedules...
- Spread out
- Again: be realistic!
Activity: Aligning Outcome Metrics

Open the assessment plan worksheet.

Pick an example strategic goal and create 1 or 2 metrics for it, using the worksheet.

Create a metric that:

- Indicates **progress**
- **Measures** quality or quantity
- Is **meaningful**
- Demonstrates **impact**
- Is **actionable**

Fill out as many columns in the worksheet as you can for each metric / assessment method.
Organizational Buy-In: Values

- Quality & continual improvement
- Focus on user needs
- Support decision making
- Demonstrate impact & value
- Increasing efficiency
- Data & performance transparency
- ROI orientation
Iterative Plan Feedback

Compiled added info; analyzed gaps

Populated assessment plan from strategic plan (& other sources)

Other library groups reviewed & added info (varied by cycle)
Part 2: Data Inventories
What is a data inventory, and why is it important?
What is a data inventory, and why is it important?

“a list of that stuff we collect that no one uses or knows how to find…”
<table>
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a Data Dashboard
...is NOT a “Data Inventory”
UNLV Libraries Data Inventory: History & Vision

- Original “Data Matrix” in use since 2007

- Issues:
  - Out of date (no update schedule)
  - Few knew what / where it was

- Goals:
  - Expand to library-wide tool
  - Foster culture of assessment
    - involve everyone in the process
  - Add searchability
| A | Main Category | B | SubCateg | C | D | E | F | G | H | I | J | K | L | M | N |
|---|-------------|---|----------|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 143 | Interlibrary Loan | 173 | Documents Provided to others for over 20 years | 173 | Paid requests for materials received from other libraries | Non-returnable | Library Administration | Assessment | Monthly | Assessment | ACRL | Library Administration | Assessment | Monthly | Assessment | ACRL |
| 144 | Interlibrary Loan | 174 | Documents Received from Total interlibrary loans and documents received from other libraries | Non-returnable | Library Administration | Assessment | Monthly | Assessment | ACRL | Library Administration | Assessment | Monthly | Assessment | ACRL |
| 145 | Interlibrary Loan | 175 | Documents Received from Total interlibrary loans and documents received from other libraries | Non-returnable | Library Administration | Assessment | Monthly | Assessment | ACRL | Library Administration | Assessment | Monthly | Assessment | ACRL |
| 146 | Staff, Gate count, Instruction, etc | 261 | Non Course-based Instruction | Workshops and activities centered on more structural learning | Community Session Count | Count of attendees to sessions print | Library Administration | Assessment | Monthly | Assessment | ACRL | Library Administration | Assessment | Monthly | Assessment | ACRL |
| 147 | Staff, Gate count, Instruction, etc | 262 | Non Course-based Instruction | Workshops and activities centered on more structural learning | Community Session Count | Count of sessions primarily designed | Library Administration | Assessment | Monthly | Assessment | ACRL | Library Administration | Assessment | Monthly | Assessment | ACRL |
| 148 | Staff, Gate count, Instruction, etc | 263 | Non Course-based Instruction | Workshops and activities centered on more structural learning | Community Session Count | Count of attendees to sessions print | Library Administration | Assessment | Monthly | Assessment | ACRL | Library Administration | Assessment | Monthly | Assessment | ACRL |
| 149 | Staff, Gate count, Instruction, etc | 264 | Course-based Instruction | Structured learning activities, workshops, and learning oppor | Session count | Count of individual sessions | Library Administration | Assessment | Monthly | Assessment | ACRL | Library Administration | Assessment | Monthly | Assessment | ACRL |
| 150 | Staff, Gate count, Instruction, etc | 265 | Course-based Instruction | Structured learning activities, workshops, and learning oppor | Attendance Count | Count of attendees at individual sessions | Library Administration | Assessment | Monthly | Assessment | ACRL | Library Administration | Assessment | Monthly | Assessment | ACRL |
| 151 | Staff, Gate count, Instruction, etc | 266 | Course-based Instruction | Structured learning activities, workshops, and learning oppor | Session count | Count of individual sessions | Library Administration | Assessment | Monthly | Assessment | ACRL | Library Administration | Assessment | Monthly | Assessment | ACRL |
| 152 | Staff, Gate count, Instruction, etc | 267 | Non Course-based Instruction | Workshops and activities centered on more structural learning | Community Session Count | Count of sessions primarily designed | Library Administration | Assessment | Monthly | Assessment | ACRL | Library Administration | Assessment | Monthly | Assessment | ACRL |
| 153 | Staff, Gate count, Instruction, etc | 268 | Non Course-based Instruction | Workshops and activities centered on more structural learning | Community Session Count | Count of attendees to sessions print | Library Administration | Assessment | Monthly | Assessment | ACRL | Library Administration | Assessment | Monthly | Assessment | ACRL |
| 154 | Staff, Gate count, Instruction, etc | 269 | Non Course-based Instruction | Workshops and activities centered on more structural learning | Community Session Count | Count of sessions primarily designed | Library Administration | Assessment | Monthly | Assessment | ACRL | Library Administration | Assessment | Monthly | Assessment | ACRL |
| 155 | Staff, Gate count, Instruction, etc | 270 | Course-based Instruction | Structured learning activities, workshops, and learning oppor | Session count | Count of individual sessions | Library Administration | Assessment | Monthly | Assessment | ACRL | Library Administration | Assessment | Monthly | Assessment | ACRL |
| 156 | Staff, Gate count, Instruction, etc | 271 | Course-based Instruction | Structured learning activities, workshops, and learning oppor | Session count | Count of individual sessions | Library Administration | Assessment | Monthly | Assessment | ACRL | Library Administration | Assessment | Monthly | Assessment | ACRL |
| 157 | Staff, Gate count, Instruction, etc | 272 | Non Course-based Instruction | Workshops and activities centered on more structural learning | Community Session Count | Count of sessions primarily designed | Library Administration | Assessment | Monthly | Assessment | ACRL | Library Administration | Assessment | Monthly | Assessment | ACRL |
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| 159 | Staff, Gate count, Instruction, etc | 274 | Non Course-based Instruction | Workshops and activities centered on more structural learning | Community Session Count | Count of sessions primarily designed | Library Administration | Assessment | Monthly | Assessment | ACRL | Library Administration | Assessment | Monthly | Assessment | ACRL |
| 160 | Staff, Gate count, Instruction, etc | 275 | Non Course-based Instruction | Workshops and activities centered on more structural learning | Community Session Count | Count of sessions primarily designed | Library Administration | Assessment | Monthly | Assessment | ACRL | Library Administration | Assessment | Monthly | Assessment | ACRL |
| 161 | Staff, Gate count, Instruction, etc | 276 | Course-based Instruction | Structured learning activities, workshops, and learning oppor | Session count | Count of individual sessions | Library Administration | Assessment | Monthly | Assessment | ACRL | Library Administration | Assessment | Monthly | Assessment | ACRL |
| 162 | Staff, Gate count, Instruction, etc | 277 | Course-based Instruction | Structured learning activities, workshops, and learning oppor | Attendance Count | Count of attendees at individual sessions | Library Administration | Assessment | Monthly | Assessment | ACRL | Library Administration | Assessment | Monthly | Assessment | ACRL |
| 163 | Staff, Gate count, Instruction, etc | 278 | Non Course-based Instruction | Workshops and activities centered on more structural learning | Community Session Count | Count of sessions primarily designed | Library Administration | Assessment | Monthly | Assessment | ACRL | Library Administration | Assessment | Monthly | Assessment | ACRL |
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| 170 | Staff, Gate count, Instruction, etc | 285 | Staff | All other paid staff | FTE Count | FTE Count = Total hours worked for Library Administration | Library Administration | Human Resources | Assessment | ACRL | Library Administration | Assessment | Monthly | Assessment | ACRL |
| 171 | Staff, Gate count, Instruction, etc | 286 | Staff | All other paid staff | FTE Count | FTE Count = Total hours worked for Library Administration | Library Administration | Human Resources | Assessment | ACRL | Library Administration | Assessment | Monthly | Assessment | ACRL |
| 172 | Staff, Gate count, Instruction, etc | 287 | Staff | Non-custodial Support Staff | FTE Count | FTE Count = Total hours worked for Library Administration | Library Administration | Human Resources | Assessment | ACRL | Library Administration | Assessment | Monthly | Assessment | ACRL |
| 173 | Staff, Gate count, Instruction, etc | 288 | Staff | Non-custodial Support Staff | FTE Count | FTE Count = Total hours worked for Library Administration | Library Administration | Human Resources | Assessment | ACRL | Library Administration | Assessment | Monthly | Assessment | ACRL |
| 174 | Staff, Gate count, Instruction, etc | 289 | Staff | Non-custodial Support Staff | FTE Count | FTE Count = Total hours worked for Library Administration | Library Administration | Human Resources | Assessment | ACRL | Library Administration | Assessment | Monthly | Assessment | ACRL |

Data sub-category (1)
(More specific: Staff - Librarians)

Data sub-category (2)
(Optional - provides more detail)

Library branch

Library division

Library department

Data collection frequency

Who/what requests this data?

Where data is reported (output)
### UNLV Libraries Data Framework

**Click on Data Points to Navigate to Definitions**

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<tr>
<th>Data Category</th>
<th>Data Subcategory</th>
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<th>Data Point</th>
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<td>257</td>
<td>Event Attendee event name</td>
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<td>Event by name</td>
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<td>Event Attendee event name</td>
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<tr>
<td></td>
<td>ILL</td>
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</tbody>
</table>
Don’t let PERFECTION (or COMPLETION) be the enemy of A USABLE TOOL.
Data Inventory Process

- Describe its **purpose** to staff.
- Identify **missing** or **outdated** data points.
- Get **staff input**.
- Design the **new tool**.
- **Train staff**.
- **Share** the tool.
- Schedule **updates**.
- Send **reminders** & links.
Determining the **purpose** of your data inventory

Purpose determines form.

- Transparency of data points
- Quick access to **key metrics**
- **Training** tool
- Solve **problems**
- Solve **data issues**
- Increase **efficiency**
Biggest issues around data?

- We **don’t use** the data we collect
- Data **doesn’t match** our questions
- Definitions & **collection procedures** aren’t tracked
- Don’t **share data** with library staff
- Don’t share data with **institution**
- No library-wide **“big picture”** of our data
- No one knows the **“who”** or **“where”** of our data
- Decision-makers **don’t know** what they can ask for
- **Unwieldy** annual **reporting**
Activity: Data Inventory Purpose

Go to the URL at left. Open: inventory planning worksheet. Save a new copy for yourself.

On your inventory planning worksheet, write out the PURPOSE of this tool at the top.
Identifying stakeholders & data providers

- Who **needs** the data?
- Who **provides** the data?
Platform / Software considerations...

- Cost & upkeep
- Ease of use (“login fatigue”)
- Required / desired features
- The simple answer:
  - Spreadsheet!
The Data Audit

1. Started with national surveys (ACRL / IPEDS)
2. Met with each library area
3. Email follow-up (review)
4. Aligned timeline with national surveys
What do you need to know / capture about this data?

- **Who** collects it
- How often (**frequency**)
- **Who uses it** -- and how/where
- **Type** of data
- **Who cleans it**, and **what** do they do
- **Platform & login** info
Add a few **data points** to your **data inventory worksheet**.

Refer to **measures** from your **assessment plan worksheet**.

**Potential descriptors:**
- Definition
- Type of data
- Frequency of collection
- Data provider (who collects it)
- Collection procedure
- Software & login in
- Who cleans or formats it
- Where is it stored

When complete, **share** your data points with **your group** and discuss.
Data Audit Questions (data providers, stakeholders, director)

- What **questions** do you want to answer?
- What **problems** do you want to solve?
- What **raw data** does your area get?
- How do you **collect & report** your data?
- Dream big---what would you **like to track**?
- What do you **need to know**, quickly?
The “Non-Expert” Advantage

A key part of a good meeting?

The non-expert.

- Outsider perspective.
- Ask **basic** questions!
- Get detailed, clear definitions.
Ask library staff for...

- Sample **raw data** files
- **Access** to shared documents
- Existing **instructions** for collecting data
- List of **software** used to collect data
- Annual **reports**
Meeting with data providers: Tips!

- Bring **laptop** with **data inventory**
- **Email** dept. with their **data points**
- **Gaps:** Filter by “null” **data providers**
- Follow-up email & deadline for **review**
Activity: Data Audit Questions

Open the Data Audit Worksheet.

Pick one **stakeholder** or **library unit**.

*What do you need to know about their data?*

On your worksheet, list:
- Stakeholder or unit name
- Questions for that stakeholder/unit
- Questions you could ask during any data audit at your library.

What are some things you want to ask?

What do you need to know about their data?
Creating a timeline and action plan

- Scope: basic statistics? All data?
- Tools, software
- # of staff involved?
- Option: Start with reported data
Getting People to **USE** It

**IF YOU BUILD IT**

**THEY WILL COME... MAYBE**
Keeping it Updated

- Fold into annual (external) data reporting
- Timed with annual library processes
  - Fiscal year (after)
  - Annual reporting (before)
  - Strategic planning cycle (before)
Hey, now you know kung fu!

I know kung fu.
Key Resources


Assessment Plan Outline Worksheet & Example

Inventory Planning Worksheet

Data Audit Question Worksheet

Data Inventory Worksheet & Example

- Data inventory (Google Sheet) pre-populated with examples
- Includes UNLV’s “uniform statistics” data points
- Includes ACRL survey data points (may need updating annually)
Questions?

Starr Hoffman, PhD, MLS, MA
Director, Planning & Assessment
UNLV Libraries

Available for workshops!

Twitter: @artgeeklibraria
Email: starr.hoffman@gmail.com