So you are a new assessment librarian...
What do you need to know?

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Takeaways / Attendees will ...

1. Better understand the scope of the assessment librarian’s role within a library.
2. Understand the challenges of having multiple professional roles, and will be able to list different strategies to keep assessment work progressing.
3. Recognize shortcuts and guideposts that can be used to more readily define the role of a new assessment librarian.
4. Have specific ideas and strategies to consider for assessment (either to test out or to implement outright).
5. List suitable assessment and reporting tools for different kinds of assessment needs.
Introductions & Brief Career Overviews

Chantelle Swaren
Assessment and Outreach Librarian
University of Tennessee at Chattanooga

Ron Schwertfeger
Instruction, Outreach & Assessment Librarian
University of Alabama in Huntsville
There are many “right” ways to be an Assessment Librarian
History

Assessment librarianship is relatively new, although assessment has been around forever:

“Further- more, such an organization would make it easier to assess the community's response to each library service not in terms of type of book withdrawn but in terms of the purpose for which material is used, assuming of course that the patron knows the purpose himself.”

Hey, can you help me with this?

As Assessment Librarian, you’ll be asked to help in variety of different projects. These may include, among others:

- Budget requests
- Factbook / ACRL / IPEDS
- Service-point planning
- Accreditation Reports
- Annual reports
- Purchase decisions
- Usage tracking
- Hopefully many others!
Data Presentation Options

- Tailor your data presentation to your audience
- Choose the visualization that best supports the story you’re telling, so people know at a glance what you’re saying
- Align with your brand standards
$6.6 million generated annually from library users accessing technology equipment and services at EPL.

$6.6 million generated annually from use of library space.

97 VISITS PER HOUR ON AVERAGE
31% OF CUSTOMERS USE THE LIBRARY TO WORK & STUDY

Return on investment (ROI)
Not only does EPL provide value to Edmontonians, every dollar invested in EPL is returned more than three times!

$1 -> $3.11

Every dollar invested in EPL generates $3.11 of value.
Or the equivalent of $10.72 per resident.

Understanding the Numbers
Libraries across the world have created or commissioned economic impact studies. Methods for calculating the use value of a library’s collection vary greatly.

Collections are the largest contributors to library economic value calculations. A key component of valuing collections is to include a discount to account for the difference between borrowing and owning an item (e.g., limited access vs instantaneous access). Nordicity calculated the use value for EPL’s collections by calculating a discount rate for physical books based on resale value (57%) and for other media based on the difference between renting and owning media on iTunes (33%).

Many library economic impact studies in Canada instead make a low (20%) of retail value) and high (100% of retail value) estimate for use of collections and then calculate the midpoint as the most representative of the value for users. As well, Nordicity based all calculations on a three year average, smoothing out year to year fluctuations in spending. Many other libraries used data from only one year.

As a result of different methodologies, library economic impact studies are not directly comparable. We believe Nordicity’s approach results in a more accurate and conservative estimation of replacement value calculations.

Use Value
Use Value is the value library customers derive from using EPL’s programs, services and collections. Nordicity calculates that EPL generates a total of $131.5 million in value for Edmonton residents. In other words Edmontonians save at least $131.5 million per year by using the library, which is equivalent to:

$2.6 MILLION OF SERVICES USED EVERY WEEK BY EDMONTONIANS

$556 PER ACTIVE MEMBERSHIP
$149 PER CAPITA
$375 PER HOUSEHOLD

But what does this really mean? What does the library do to produce this value?
At $107 million, the largest value generated by EPL is for the use of physical and electronic collections. But the library is so much more, offering unparalleled access to educational, cultural technology, and community programs and services to Edmontonians both inside and outside its walls.

$6.4 million generated annually through participation in programming inside and outside the library.
<table>
<thead>
<tr>
<th>Location</th>
<th>2014 Expenditures per FTE Student</th>
<th>2014 # of Students</th>
<th>2014 Titles Held per FTE Student</th>
<th>Reference Transactions Compared to Students</th>
<th>Group Presentation Participants compared to # of students</th>
</tr>
</thead>
<tbody>
<tr>
<td>TN - Austin Peay State University</td>
<td>$350.60</td>
<td>217</td>
<td>70</td>
<td>31%</td>
<td>128%</td>
</tr>
<tr>
<td>TN - East Tennessee State University</td>
<td>$219.05</td>
<td>282</td>
<td>73</td>
<td>23%</td>
<td>65%</td>
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<tr>
<td>TN - Middle Tennessee State University</td>
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<td>146</td>
<td>54</td>
<td>88%</td>
<td>67%</td>
</tr>
<tr>
<td>TN - University of Memphis</td>
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<td>129</td>
<td>73</td>
<td>73%</td>
<td>67%</td>
</tr>
<tr>
<td>TN - University of Tennessee - [Knoxville]</td>
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<td>107</td>
<td>95</td>
<td>185%</td>
<td>76%</td>
</tr>
<tr>
<td>TN - University of Tennessee at Chattanooga</td>
<td>$351.91</td>
<td>197</td>
<td>66</td>
<td>84%</td>
<td>58%</td>
</tr>
</tbody>
</table>

**2014 # of Students per FTE Library (Prof, Support & Student Assistants) Staff**

![Bar chart showing the number of students per FTE library staff for different locations in Tennessee.](image-url)
2011 Total Expenditures per Enrolled FT Students
2012 Total Items Borrowed ILL

- Austin Peay
- East TN State
- MTSU
- TN State
- U Memphis
- UTK
- UTC

Each block represents 1000 items.
What We Wish We Had Known in “1st Year on the Job”

- Try to consolidate as much as possible - don’t overburden yourself.
- Assessment changes over time (processes, tools, etc.) - stay current.
  - Avoid the “we tried that a few years ago…” excuse.
- Avoid re-running reports at different times.
  - The numbers might not match up.
  - The end of fiscal year suffices for most things.
  - Don’t reinvent the wheel.
- Tribalism
- Handling data that is perceived to be incorrect
What We Wish We Had Known in “1st Year on the Job”

- Writing assessment reports
  - Clear, thorough, well-documented
  - (Not necessarily entertaining)
- Collect the data
  - Even if you’re unsure whether you’ll have the time to analyze the data, **collect the data**. (It won’t expire.)
- Use existing tools (ILS reports, gatecounts, etc.)
- Know how & when to say “NO”
- If you have a hybrid role, try to coordinate your efforts. Assessment informs all functions so don’t try to keep them separate
What We Wish We Had Known in “1st Year on the Job”

• Timelines / calendars
  • Understanding externally-imposed (“hard deadlines”) vs. internally-important-but-flexible timelines
  • Example: UTC Library does a campus-wide survey over the last 4 weeks of the Spring semester each year
  • Other libraries say that the 3rd week of January can be a good time for student engagement & surveys
  • **Academic year vs fiscal year vs calendar year**
What We Wish We Had Known in “1st Year on the Job”

- Prioritize
  - If we don’t take the time, we won’t have the time.
  - Assessment must be a priority – a systemic process.
  - Other things will always encroach.
    - Be diligent.
    - Get the administrative support to keep assessment on your calendar.
  - External deadlines help (e.g., ACRL survey); build those into your yearly plan.
What We Wish We Had Known in “1st Year on the Job”

• Share the data with your colleagues on a regular basis
  • They’re curious
  • They can use the data for their own projects
  • It’s good to be consistent so everyone is telling the same story
  • It helps to highlight the work you’re doing (since assessment is often behind the scenes, your colleagues may not understand how busy you are at various time)
Note: Use existing systems when possible; resist the temptation of NEW!
Keep in Mind (Ongoing Basis)

- Identify stakeholders (including yourself)
  - In your department, in the library, in the university, in the different colleges
  - Pre-planning with OPEIR / Institutional research
  - Work with your local IRB
- Build library partnership into processes if possible at the university level
- Resistance / Opportunities / Threats / Challenges
Assessment Reporting To-Do’s (Routine/Recurrent)

- ACRL & IPEDS
- Program reviews
- Annual surveys / annual reports
- Library service feedback
  - Reference transaction surveys
  - “Secret shopper” assessment
- Library Instruction sessions
  - Knowledge eval: quiz or H/W
  - Library instruction feedback surveys: one for instructor, and one for students (facilitated through the instructor - we rely on them).
Assessment Reporting To-Do’s (Routine/Recurrent)

- Headcount numbers
  - Library space census/headcount
  - Session attendance #s
  - Study room usage
  - Etc.
- Factbooks
One-Off Assessment Reporting Needs

- Reaccreditation reports
  - University level: SACSCOC & others
  - College / Department: ABET & others
  - NOTE: these are technically *recurring* needs, but they are so infrequent compared to other needs
- New programs
SOME EXAMPLES @UAH
Organize & Share your Findings
Salmon Library Assessment

Home

Salmon Library Assessment

The library assessment program at the UAH M. Louis Salmon Library is multifaceted. The program is the attempt to accurately reflect how the services & resources of the UAH Library contribute to the success of students, faculty & others at UAH. It is a response to the need to document the successes, and to highlight & address areas for improvement. It is both formal and informal, quantitative and qualitative, external and internal.

The library assessment program attempts to answer the following questions:

1. What do we do?
2. Why do we do what we do?
3. How do we do what we do?
4. How well are we doing it?
5. What can we do better?

Please contact Ron.Schwertfeger@uah.edu with questions or comments.

About This Website
<table>
<thead>
<tr>
<th>Number</th>
<th>Name</th>
<th>Start</th>
<th>End</th>
<th>Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>001_sp15</td>
<td>Students who receive library instruction will be able to apply information literacy skills both to locate and to identify appropriate sources for research.</td>
<td>8/1/2017</td>
<td>7/31/2018</td>
<td></td>
</tr>
<tr>
<td>002_sp15</td>
<td>The library provides satisfactory study space for student learning.</td>
<td>8/1/2017</td>
<td>7/31/2018</td>
<td></td>
</tr>
<tr>
<td>003_sp15</td>
<td>The library website enables users to locate information and research material on their own.</td>
<td>8/1/2017</td>
<td>7/31/2018</td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td>Start</td>
<td>End</td>
<td>Progress</td>
<td></td>
</tr>
<tr>
<td>----------------------------------------------------------------------</td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>
Post-Instruction Satisfaction Surveys
OR: “Did your students benefit from the library instruction presentation that your class received?”
<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>2.1 How satisfied were you with the presentation?</td>
<td>283</td>
<td>216</td>
<td>33</td>
<td>2</td>
<td>1</td>
<td>535</td>
<td>[1]</td>
<td>93.1%</td>
</tr>
</tbody>
</table>
Post-Instruction Information Literacy Quiz
You are taking a class in the College of Nursing. You have an assignment for which you must find scholarly articles in a nursing-specific database. Starting on the UAH Library web page (http://www.uah.edu/library), the best place to look for those articles is:

A. Google for “nursing articles”.
B. Search for “nursing articles” in Primo Pathfinder.
C. Click on the "Articles & Databases" tile and then choose a database from the “nursing" subject section.
D. Sign in to your library card, to see if you owe any overdue fines.
E. Use “Interlibrary Loan” to request an article from another university.
You are writing a research paper on the Hindenburg disaster of 1937, and you need to find several primary sources. Which one of the following sources would NOT be a primary source?

- Weather reports from May 1937 for Trenton, NJ, where the crash occurred.
- An English translation of the diary of Max Pruss, captain of the airship.
- An mp3 compilation including the radio broadcast from Herb Morrison, an on-site reporter at the crash.
- The wikipedia entry for Hindenburg.
Which of the following are effective strategies for locating company information?
A. Searching for their stock ticker
B. Looking for the company name in Business Source Premier
C. Googling the company name plus INC at the end
D. Searching for their annual report (10-k form) on their website
• A only.
• B only.
• A, C and D.
• All of the above.
Information Literacy Quiz

Initial Report [Summer 2015 semester pilot]

Introduction
As a part of the Salmon Library’s efforts to serve the general education and research goals of UAH, the library provides in-class presentations. These sessions are provided upon request from a UAH instructor, and address topics on Information Literacy, Library Resources, Research Skills, etc., as requested by the instructor. Students receiving library instruction will be able to apply information literacy skills to locate and identify appropriate sources for research.

Administration of the quiz [Summer 2015 semester pilot]
As one step in evaluating the effectiveness of the presentations and the student retention of the material that was presented, the UAH instruction librarians created an online quiz using the university’s Qualtrics online survey tool. It was built in Qualtrics so that each question would appear on a separate page (for students who might be completing the assignment on a smartphone or other device with a smaller screen).

As a pilot approach for this, the quiz was provided to students in two course sections after they received library instruction in the classroom. The quiz was administered using Qualtrics and was completed in the Spring 2015 semester.
Building Census ("People Count")
<table>
<thead>
<tr>
<th>1st Floor South Tower</th>
<th>2nd Floor Central and North Towers</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Study Room 112 *</td>
<td>22. Classroom 214 *</td>
</tr>
<tr>
<td>3. Lib 111 - Classroom *</td>
<td>23. Study Rooms 218 A-C *</td>
</tr>
<tr>
<td></td>
<td>24. C2 *</td>
</tr>
<tr>
<td></td>
<td>25. N2 *</td>
</tr>
<tr>
<td></td>
<td>26. N3 *</td>
</tr>
<tr>
<td></td>
<td>27. Archives *</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>People Count</th>
<th>2nd Floor Central and North Towers</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Required</td>
<td>22. Classroom 214 *</td>
</tr>
<tr>
<td>1. Time Slot*</td>
<td>23. Study Rooms 218 A-C *</td>
</tr>
<tr>
<td>*</td>
<td>24. C2 *</td>
</tr>
<tr>
<td>Mark only one oval.</td>
<td>25. N2 *</td>
</tr>
<tr>
<td></td>
<td>26. N3 *</td>
</tr>
<tr>
<td></td>
<td>27. Archives *</td>
</tr>
<tr>
<td>10 am</td>
<td></td>
</tr>
<tr>
<td>1 pm</td>
<td></td>
</tr>
<tr>
<td>2 pm (Sunday)</td>
<td></td>
</tr>
<tr>
<td>4 pm</td>
<td></td>
</tr>
<tr>
<td>5 pm (Sunday)</td>
<td></td>
</tr>
<tr>
<td>7 pm</td>
<td></td>
</tr>
<tr>
<td>8 pm (Sunday)</td>
<td></td>
</tr>
<tr>
<td>Midnight (Exams)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>4. Lobby seating *</th>
<th>5. Infoarcade *</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>6. Study Room 122 *</th>
<th>7. Study Room 123 *</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>8. East Bay *</th>
<th>9. Mediascapes *</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Call to Action - Connect!

Assessment communities/groups/listserves/forums
Professional associations & literature

Networking
Others – please share!
References


Thank You!

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