Promoting a Culture of Assessment throughout the UCLA Library Organization

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Strategic Planning Implementation Coordinator
Digital and Distinctive Product Manager
Overview

• UCLA Library environment
• Developing tools and skills
• Promotion and education
• What [will] happen[ed]
Environment/Organization – Big, Complex

- 45,000 students in 125 majors
- 100 librarians
- 350 full-time staff working
- > 12 libraries
- Units report to the University Librarian through four Associate University Librarians and management staff
- Matrix ambitions, but still partially siloed
Why assessment?

LIBRARY STRATEGIC GOALS PAVING THE WAY FOR ASSESSMENT

- “We use a transparent, user-centered, evidence-based approach to assess our activities and impact.”

- “We nurture an environment of ongoing evaluation, transparent decision making...”

- “Our research support improves continuously through assessment-based improvements.”

- “We improve our instructional services, focusing on effective pedagogical practices and ongoing assessment.”

- “Our space-related initiatives begin with a data-driven, user-centered approach.”
## Tools & skills – history and assumptions

<table>
<thead>
<tr>
<th>Earth was cooling (~ 2006)</th>
<th>Present</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Failing toward success - Data Warehouse</td>
<td></td>
</tr>
<tr>
<td>• Ubiquitous skills required - Confluence, JIRA &amp; BOX</td>
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<tr>
<td>• Library strategic plan implementation</td>
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<tr>
<td>• Our assessment solution - Data Lake</td>
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</tbody>
</table>
Who’s doing the work

Assessment for Change Team (ACT)

Team Lead/s: @Diane Mizrachi and @Sharon Shafer

Project Info: Assessment for Change Team (ACT)

Summary: What kinds of data about the library do we already gather? What information should we be assessing in order to tell our story? How should we share those stories with the library and campus stakeholders? This group is related to Goal Team 3 (Function as the Heart that Enables Research to Thrive) and Goal 1

MEMBERS

Team Leads: Sharon Shafer and Diane Mizrachi

Cabinet Sponsor: Todd Grappone

Strategic Planning Consultant: Dana Peterman

Members:

- Simon Lee
- Sandra Farfan-Gracia
- Estefani Bowline
- Neil Hodge
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CULTURE OF ASSESSMENT

- Workshop
- Consult
- Iterate
- Align with strategic directions

ACT Goals
- Workshop
- Consult
- Iterate
- Align with strategic directions

ACT
- consultants
- workshops
- training
- one-on-one consultations

Library Staff
- feedback
- improvements
- buy-in

Library Staff
- grassroots
- strategic planning
- buy-in

Management
- support
- engagement
- data-informed decisions
- resources

Tool Creation
- Intranet
- Lake Modules
- Assessment
- Reporting
- Data
- Analysis
- Dashboards
- dashboards

Cultural Change
- Education
- workshops
- training
- one-on-one consultations

UCLA
Promoting a Culture of Assessment throughout the UCLA Library Organization

July 4, 2019

Primary Tool - UCLA Library Data Lake

GMO

- Centralizes assessment-related activities in the Library via Confluence
- Allows staff to add &/or discover studies, data, reports, and tools
- Uses templates to provide guidance for assessment activities
- Offers consultations
- Enables communication with management and stakeholders

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### A-Z Data

**Title** | **Link to RAW data (required)**
---|---
DATA: Academic Reading Questionnaire (ARQ) | https://ucla.box.com/s/am4jvbvzg2dykdxr9hazew4ym32lz4
DATA: Acquisitions Jasper Report | https://reports.library.ucla.edu/
DATA: AEON | https://ucla.bi.atlas-sys.com/AeonAuthentication/jogOn
DATA: ARL Statistics | http://www.arlstatistics.org/publications
DATA: CDL annual usage reports | See CDL Annual Usage Reports
DATA: Changing to a culture of data-informed decision making - workshop 1 | https://ucla.box.com/s/lt2g8oh75d6467y39zh3n2z3poswzw2
DATA: Changing to a culture of data-informed decision making - workshop 2 | https://ucla.box.com/s/b5rw4k3e7xxwtt4b47g5bcyrv9kwht
DATA: Digital Library Program (DLP) content census | DLP content census, summer 2018
DATA: Google Analytics for UCLA Library | https://analytics.google.com
DATA: Public Service Statistics - Export Data | https://unitproj.library.ucla.edu/statistics/export/index.cfm
DATA: Snapshot Days 2013 | https://ucla.box.com/s/k22ax8363qoxs8k06q26934x0asbuy
DATA: Summary of Instructional Activities (SIA) | https://unitproj.library.ucla.edu/xia/
DATA: UCLA 2015 Geo Q4 rptFunctionalDistribution | https://ucla.box.com/s/u2sibh8tbttg499qpon1o6x4q8n05x
DATA: UCLA 2015 MGMT Q4 rptFunctionalDistribution | https://ucla.box.com/s/3k4hn0vps1dip8nt5cmptdeh7acofm
DATA: UCLA CDL annual usage reports | UCLA CDL Statistics folder
DATA: UCLA FY 2014 websurveymonthlytotals | https://ucla.box.com/s/ng3a27fgq3833zzz6arr047v8bbr6mr
Promotion of UCLA Library Data Lake

Communicate – written, verbal, and administrative

Educate – workshops that introduce, expansion via stakeholders

Reach out – validate and expand legitimacy within the broader UCLA community

Follow-up – let people know that we’re listening to them and supporting them

Create skin in the game – users help development the tool

See Sharon Shafer in Room 3, 45 minutes from now to learn about the Data Lake tool
## ASSESSMENT: Optimizing UCLA Library Special Collections Pages for Findability

Created by Caroline Cube, last modified by Dana Peterman on May 15, 2019

<table>
<thead>
<tr>
<th>Person(s) associated</th>
<th>@Caroline Cube  @Courtney E. Jacobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group or Unit primarily responsible for the assessment</td>
<td>Library Special Collections</td>
</tr>
<tr>
<td>Today is the start of your planned project</td>
<td>01 May 2019</td>
</tr>
<tr>
<td>What date would you ideally like to complete your project?</td>
<td>01 Jul 2019</td>
</tr>
<tr>
<td>Status</td>
<td>Brainstorm</td>
</tr>
<tr>
<td>In-process</td>
<td></td>
</tr>
<tr>
<td>Leader(s) &amp;/or sponsor(s) brought in with @name</td>
<td></td>
</tr>
<tr>
<td>JIRA (if applicable)</td>
<td></td>
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</tbody>
</table>

### Purpose

**Assessment is used to make decisions that guide our future, not to validate decisions of the past**

- **What change(s) do you want to make?**
  - Reconfigure website for better findability. Apply search engine optimization concepts to the website. Change website based on internal and external users input to accommodate current and predicted usage. Would like collecting priorities section to be more frequently accessed.

- **What key questions do you need to answer to inform that change and why?**
  1. How does the public interact with the LSC pages on
### Logic Model - Use this chart to brainstorm your ideas for an assessment.

<table>
<thead>
<tr>
<th>Outcomes (Changes)</th>
<th>Inputs (Resources)</th>
<th>Activities (Interventions)</th>
<th>Beneficiaries (Participants)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Results for a specific population, community, or institution E.g. Outcome 1: Students will learn how to look up a book in the catalog and find it on the shelf</td>
<td>Staff, finances, information tech, space, time, physical resources E.g. Input 1 = Librarian Input 2 = Library catalog Input 3 = Library classroom Input 4 = Book stacks</td>
<td>Programs, services, &amp; processes E.g. Activity 1 = In-class library sessions – students find a book in the catalog Activity 2 = Touring the shelves</td>
<td>Targeted population(s) for a given service and indirect beneficiaries. Tip: See Personas and Stakeholders E.g. Population 1 = Undergraduates in English 3 courses</td>
</tr>
<tr>
<td>Short term - we have better SEO our website Long term - the public can access our website and find what they need easily; UCLA undergraduates can find and use our site independently.</td>
<td>Data from websites SEO LSC Public Services</td>
<td>Anecdotal information gathered from LSC Public Services Caroline Cube SEOing</td>
<td>Patrons Undergraduates LSC staff</td>
</tr>
</tbody>
</table>

#### Perform an Environmental Scan
- Scan the literature.
- Consult with other UC Libraries, UCLA, and other libraries.
- Search the Data Lake and other data sources (e.g., UCOP Statistics) to get existing DATA.

#### Select Method of Assessment
- What type of tool/method of assessment will work best to gather the data you need? Interview; Google Analytics (not sure how to use them); Aeon. Not sure.
- See Do I need to get an IRB Exemption for a Study? If needed, consult Sharon Farb.
- For questions about using UIDs and mass emailings, consult SAIRO.

#### Analyze and Interpret Results
- How do you plan to handle analysis?
- Draft a report and notify stakeholders via Data Lake Reports REPORT: Special Collections Web Use 2017 - 2018
Education - Workshops

STUDENT AFFAIRS & RESEARCH OFFICE – WORKSHOP 1
Broader view, methods and consultation

ACT - WORKSHOP 2
Methods and introduction to assessment lifecycle

USER ENGAGEMENT - WORKSHOP 3
Focused topics in a matrixed environment
What [will] happen[ed]

✓ **Assessment is difficult and requires mentoring and follow-up**
  - Forms need to be simple – even logic models are hard
  - Workshops and in-person consultations must be continuously offered
  - People want to do too much and do not have all the tools they need

✓ **Management support, engagement, and data-informed decision making is necessary**
  - Librarians need to be taught how and when to advocate to avoid creating orphan studies
  - Communication and transparency across an assessment lifecycle is critical

✓ **Recognizing and documenting assessment escapes people**
  - Teaching is not enough
  - We need to take responsibility for centralizing our work
What [will] happen[ed]

• Conduct follow-up consultations with people working on assessments at UCLA
• Schedule and conduct a series of assessment workshops using a Carpentry model
• Populate the Lake with more data and past reports
• Connect assessments with projects
• Teach staff how to identify and advocate with stakeholders in a way that focuses on results
Ask me some questions
Collaborate with us


Feed Me

dpeterma@library.ucla.edu