# SYRACUSE UNIVERSITY LIBRARIES

# Functional Assessment at the Libraries

## Assessment Overview

Assessment activities began in FY16 with a focus on hard operational metrics such as collections expenditures, reference, instruction, circulation, campus delivery to offices, preservation, IT performance, entrepreneurship, and SU press activities. While these are core functions that are also reported out via the Libraries' *Annual Report* and to external agencies, they were not tied to specific strategic goals, initiatives, or formal "assessment" activities

Following the 2016 publication of the Libraries' *Strategic Directions* in which goals and objectives were intentionally aligned with the University's Strategic Plan "assessment" goals were realigned to focus on progress towards our strategic goals.

*IMPLEMENTATION AND ASSESSMENT*

*The Syracuse University Libraries are organizing our programs, staffing, advancement, and annual assessment activities around the following areas of excellence outlined in this Strategic Plan 2. We have a tradition of data-driven decision-making, from the metrics and evaluations run by our Program Management Center to the close analysis of patterns of use for subscription databases, which ensures that collections budgets are being spent wisely and for maximum impact. Libraries staff are committed to extending our assessment activities to be an ongoing and integrated program at all levels, covering collections, services, spaces and staffing needs. To this end we have established annual assessment metrics for our goals and are making them a regular part of our Library Management Team conversations.*

Assessment goals chosen for FY17 - FY19 have been selective drawn from the *Strategic* Directions and focus on:

Research & Discovery
- ◦ Digital Library Program
- ◦ Support for Research
- ◦ Open Access

The Student Experience
- ◦ Information Literacy
- ◦ Online Instruction

One Library for One University
- ◦ Accessibility & Inclusion
- ◦ Internationalization
- ◦ Needs Assessment for and Definition of a Center for Collaborative Scholarship (Faculty Commons)

Click QR to read the Libraries' *Strategic Plan.*

## Selected Experiences

### The SU Libraries Digital Library Program (DLP) & Assessment Work

Problem:
- How to manage the work of a cross-departmental team (the DLP Core Team) that is both ambitious in its assessment objectives in order to fulfill strategic goals of the overall organization, while challenged by an equally ambitious project load and a more generalized lack of resources (i.e. time of available personnel) devoted toward those goals.

Proposal:
- Pilot an agile-like self-management approach that takes the team's assessment objectives as its guiding principles (January – June 2018) and create more time, space, and energy for project work and program management.

Plan
- Affirm core mission
- Create Team Agreement to create communications and accountability structure.
- Hold weekly "Commitments Meetings" asynchronously on the Team's Slack channel to establish self-selected priorities that work toward meeting either assessment goals or core mission work.
- Hold weekly "Friday Wins" to unambiguously celebrate the accomplishments of the Team.
- Hold bi-weekly meetings with project managers to update the Project Hopper (the DLP's Program Management tool)
- Hold bi-weekly meetings with Administrative Liaisons that are focused on assessment objectives and core mission of DLP.
- Hold monthly meetings with Core Team to refocus and continually assess project and program work.

### DLP: Assessment Work Takeaways...



**Successes**

More time to do the work.
Increased sense of team cohesiveness.
A new definition of "affiliate team members" who are critical to fulfilling assessment objectives and meeting needs of our core mission.
Core Team meetings more efficient and focused.
Core mission work better defined.
Head of Digital Library Program appointed in March 2019.

**Challenges**

Bandwidth of team members coupled with conflicting priorities from home departments continue to pose challenges to a programmatic approach.
Assessment objectives are not evenly distributed.
Accountability structures need additional work from DLP Head, Core Team Members, and Administrative Liaisons to maintain focus.

**Lessons Learned/Being Learned**

(Self)-management of a non-departmental program team can be as much (if not more, work) than traditional departmental management.
Administrative support for core mission and assessment goals and program infrastructure is critical and should be re-enforce and reiterated throughout the year.
The "core mission" needs to be retained and tended to even while yearly objectives are defined and pursued.

### Assessing the Need and for, and Defining a Faculty Commons

Problem:
- The perception that increasing amounts of space are being given over to students, with no neutral spaces for faculty to conduct research, meet with colleagues, and collaborate.

Proposal:
- To create a faculty commons at the Libraries that provides a variety of spaces for faculty to:
  - To escape work and constant noise, and contemplate your research. (To clear one's head)
  - Writing and support from other faculty members just by being there
  - Meeting with colleagues to discuss research and engage in University service activities in purpose-built meeting rooms with technology.
  - Learn about resources, programming, and workshops.

Planning Process
- Needs assessment survey of the faculty to determine whether this was an actual need.
- Held several focus groups.
  - Set questions to lead the conversations.
  - Drilled down for more details.
  - Allowed faculty to design their "dream" commons using "to-scale furniture and a variety of meeting spaces
- Held individual interviews with a select individuals.
- Created sample renderings of the faculty commons, and requested feedback from all survey respondents.

Further progress is on hold pending temporary use of space by units from Shine and elsewhere. To prepare the space for their use, necessary remediation and infrastructure improvements were made, eliminating the need for that work to be done at a later date and saving costs.

### Faculty Commons: Assessment Work Takeaways...



**Successes**

Faculty greatly appreciated being asked and involved in the exploratory planning process.
The hands-on space design process was a hit and made what could be an abstract experience much more tangible
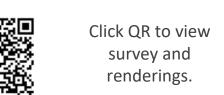
**Challenges**

Relatively low 17% response rate to survey and follow-up focus groups. Some of this can be attributed to difficulties in communicating directly with faculty.
Keeping interest alive during the 2+ year period when space will be unavailable.

**Lessons Learned/Being Learned**

Involve stakeholders whenever possible.
Gather quantitative and qualitative data.
Use a variety of instruments for data collection including surveys, focus groups/interviews, fun and interactive exercises.

Click QR to view survey and renderings.

View the survey results          View Commons renderings

### Assessing Open Access at SU Libraries

**Plan:**
With a need to increase support for Open Access within the SU Libraries and campus to continue building infrastructure, services enabling discovery of University research, scholarship, and creative works, the SU Libraries focused on improving understanding by Libraries staff about Open Access and scholarly communications and creating a common understanding on Libraries services.

**Assessment and Successes:**
An Introduction to Modern Scholarly Communications professional development series was created for staff, and led to increase awareness of: digital librarianship, scholarly communications, and use of relevant terminologies, and Open Access. The Open Publishing Services Unit was created, within the Department of Research and Scholarship, which led to a more defined organizational structure and common understanding of how the Libraries can effectively support OA, publishing, author rights, copyright, and the institutional repository.

**Challenges:**
Bandwidth of staff and team members and competing priorities, including additional objectives. Assessment objectives are not always tied to other unit or departmental priorities or work. Scheduling conflicts for staff interested in attending events, inhibiting professional development.

### Assessing Online Learning with SU Libraries

**CHALLENGES:** One of the challenges of assessing the impact of academic libraries upon student learning is that Syracuse University *librarians do not teach credit-bearing courses* and engage students throughout the course of a semester, as is more common with classroom-based faculty.

An additional challenge of online learning in particular is that *additional barriers,* such as *time, space, and programmatic gatekeepers* stand between library services and the students who are use them, making it difficult to assess actual the actual impact that Syracuse University Libraries has upon online students and programs. Contributing to this challenge is the *fragmented online landscape* that has developed here at Syracuse University. While University College has emerged as a leader in offering centralized leadership with regards to online learning, more than two-thousand fully online graduate students are supported by their individual schools and colleges across campus, outside of University College's portfolio.
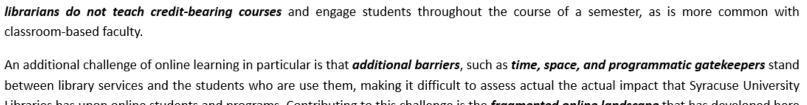
**ASSESSMENT:** Working here at SU Libraries with Librarian Research and Emerging Issues Analyst Peter Verheyen has been tremendously helpful in trying to understand how Syracuse University Libraries could assess its impact upon the online community. One of the big challenges is trying not only to *identify relevant data sources,* such as off-campus usage via our EZproxy, but also ultimately trying to find data that provides helpful information. As Peter has said several times, *"What's the narrative? What story do the data tell?"*
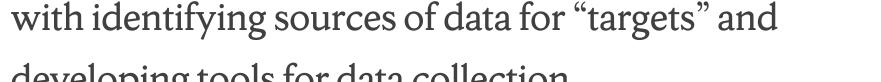
**PLANS:** Where conversations related to assessment have been helpful, and thus some of the lessons being learned, are by trying to *envision new ways for meaningful assessment* to take place. Two ideas that we will be exploring this year, thanks in no small part to rightfully increased focus on assessment, are to launch a pilot survey designed for online students, as well as trying to figure out ways that creating a Blackboard-based library research module could assist with measuring the impact that Syracuse University Libraries have upon student learning.

## The Libraries' Assessment Process

Libraries' Management Team (LMT) met to decide on areas of *Strategic Directions* to focus on.

Objectives and strategies aligned with goals and assigned to "champions."

- ◦ Program Management Center (PMC) offers to help with identifying sources of data for "targets" and developing tools for data collection.

"Champions" report out progress towards goals at regular intervals.

- ◦ Presentations to LMT.
- ◦ In Staff News.
- ◦ Via Libraries listserv.

Final fiscal year reports submitted to Institutional Effectiveness and Assessment.

- ◦ "Champions entered into master spreadsheet .
- ◦ Provided training in TK20 so "champions" now enter and submit independently.

Repeat

Challenges

- ◦ Articulating goals, objectives, strategies… so that they directly relate to the Strategic Plan and are action-oriented with tangible outputs.
- ◦ Starting and sustaining discussions of strategic goals and progress across the organization on an ongoing basis.
- ◦ Reflecting on the work being done and assessing effectiveness and impact regularly and sharing.
- ◦ Realizing that the goals, objectives, strategies… are related to activities we are doing anyway, and not an additional add-on.

This poster created by Deirdre Joyce, Amanda Page, John Stawarz, and Peter Verheyen.

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