

# **From Faith to Evidence: Demonstrating the Value of Libraries**

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**Congreso de Bibliotecas Universitarias Y Especializadas  
Santiago de Chile  
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# Overview

- ARL (Association of Research Libraries)
- Demonstrating value
- Assessment librarians
- StatsQUAL – LibQUAL+
- LIBValue (emphasis on Commons)
- Testing New Methods
- Value Scorecard (Town & Kyrillidou, 2013)
- Strategy and Metrics

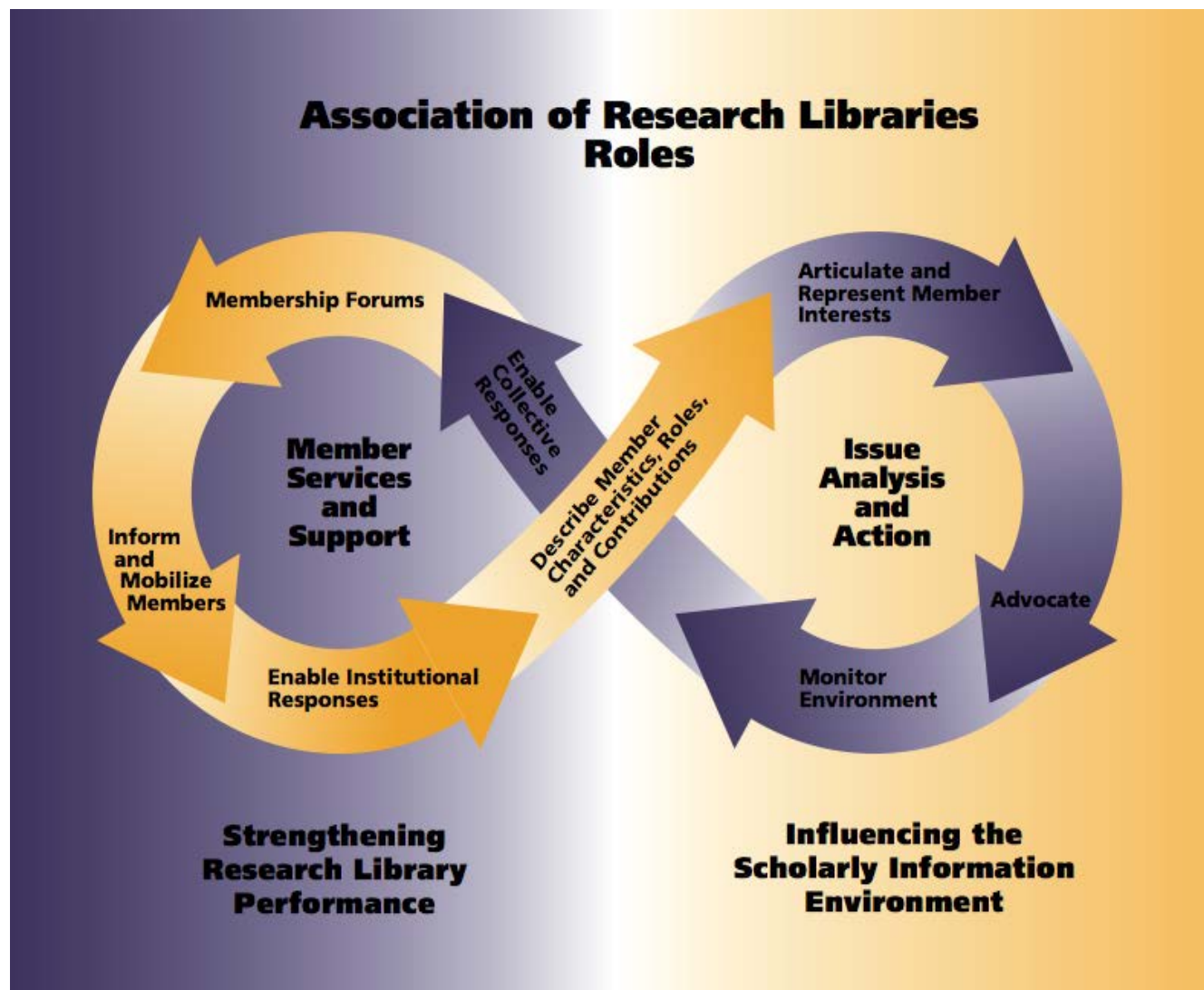
# ARL Member Institutions

- 115 ARL university libraries
  - 73 medical libraries
  - 77 law libraries
- 10,000+ professional staff members
  - About 1,000 staff members at medical libraries
  - A little more than 700 staff members in law libraries
- 10 nonuniversity ARL members
  - About 4,000 professional staff members
- Full List of Member Institutions:  
<http://www.arl.org/>

# Map of ARL Member Institutions



# ARL Roles



# ARL Statistics and Assessment

...To **describe** and measure the  
performance of **research**  
**libraries** and their contribution to  
teaching, research, scholarship and community  
service ...

# ARL Statistics and Assessment

...To describe and measure the performance of research  
libraries and their **contribution** to  
**teaching, research,  
scholarship** and community service  
...



# James Thayer Gerould (1906-1920)



- What would you like to know about research libraries if you were the library director at the U of Minnesota in 1906?



# Wendy Pradt Lougee (2002-present)



- What would you like to know about research libraries if you were the library director at the U of Minnesota in 2014?

# In the beginning ... ARL Statistics



- [www.arlstatistics.org](http://www.arlstatistics.org)



PDF

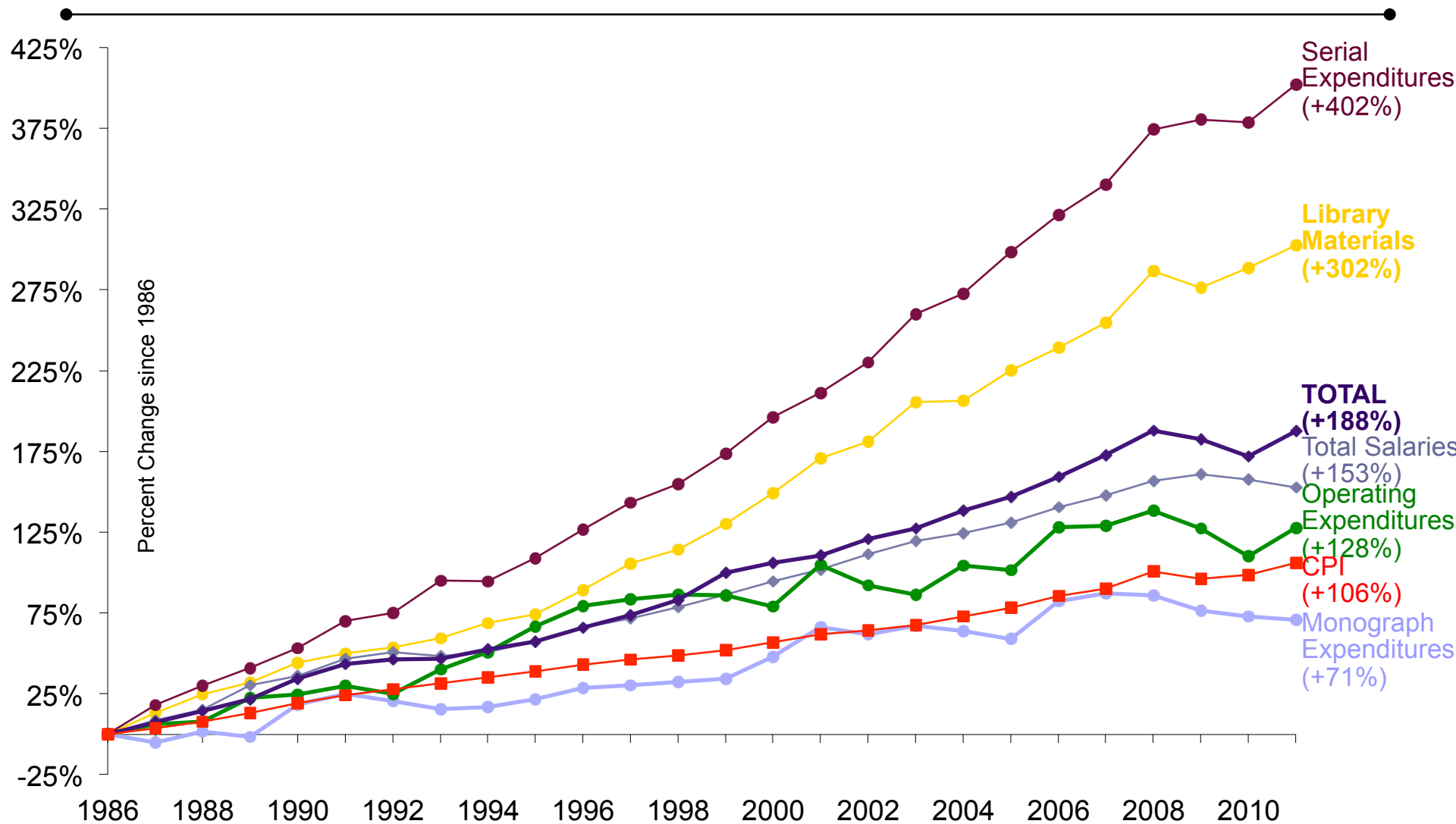
Or print



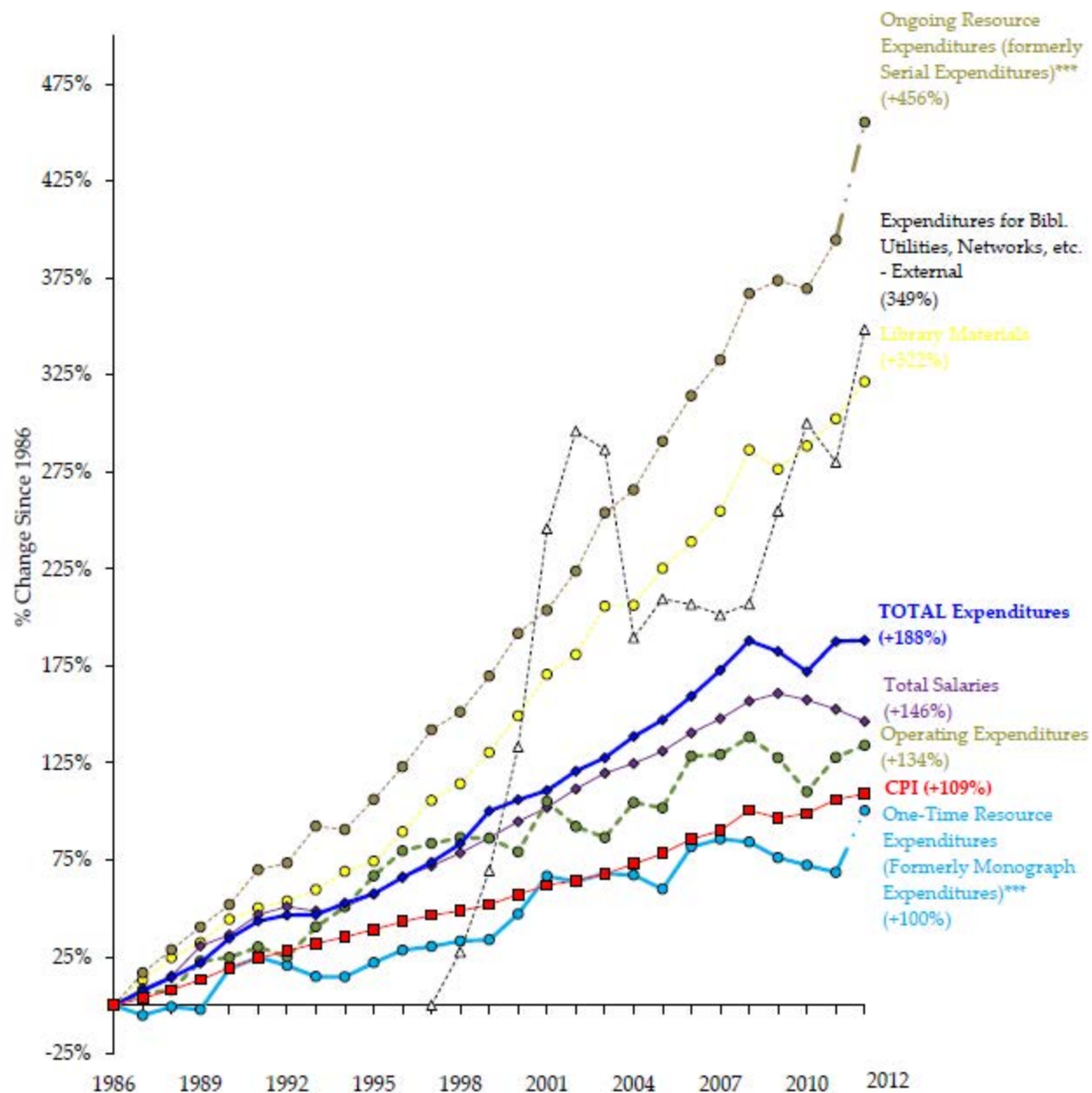
ARL Statistics<sup>®</sup>  
1906 – present

Interactive  
analytics

# Expenditure Trends in ARL Libraries, 1986-2011

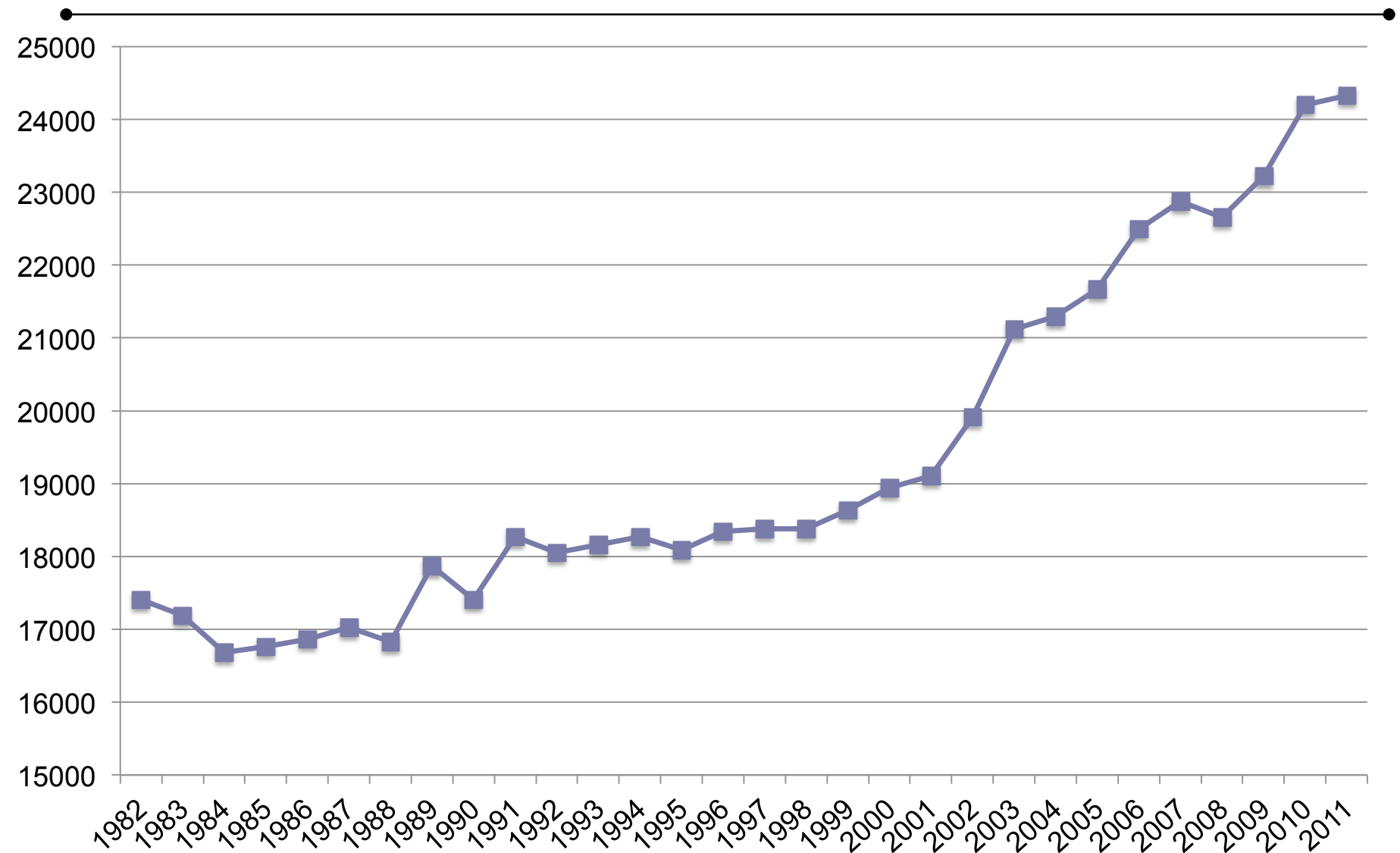


# Expenditure Trends in ARL Libraries, 1986-2012

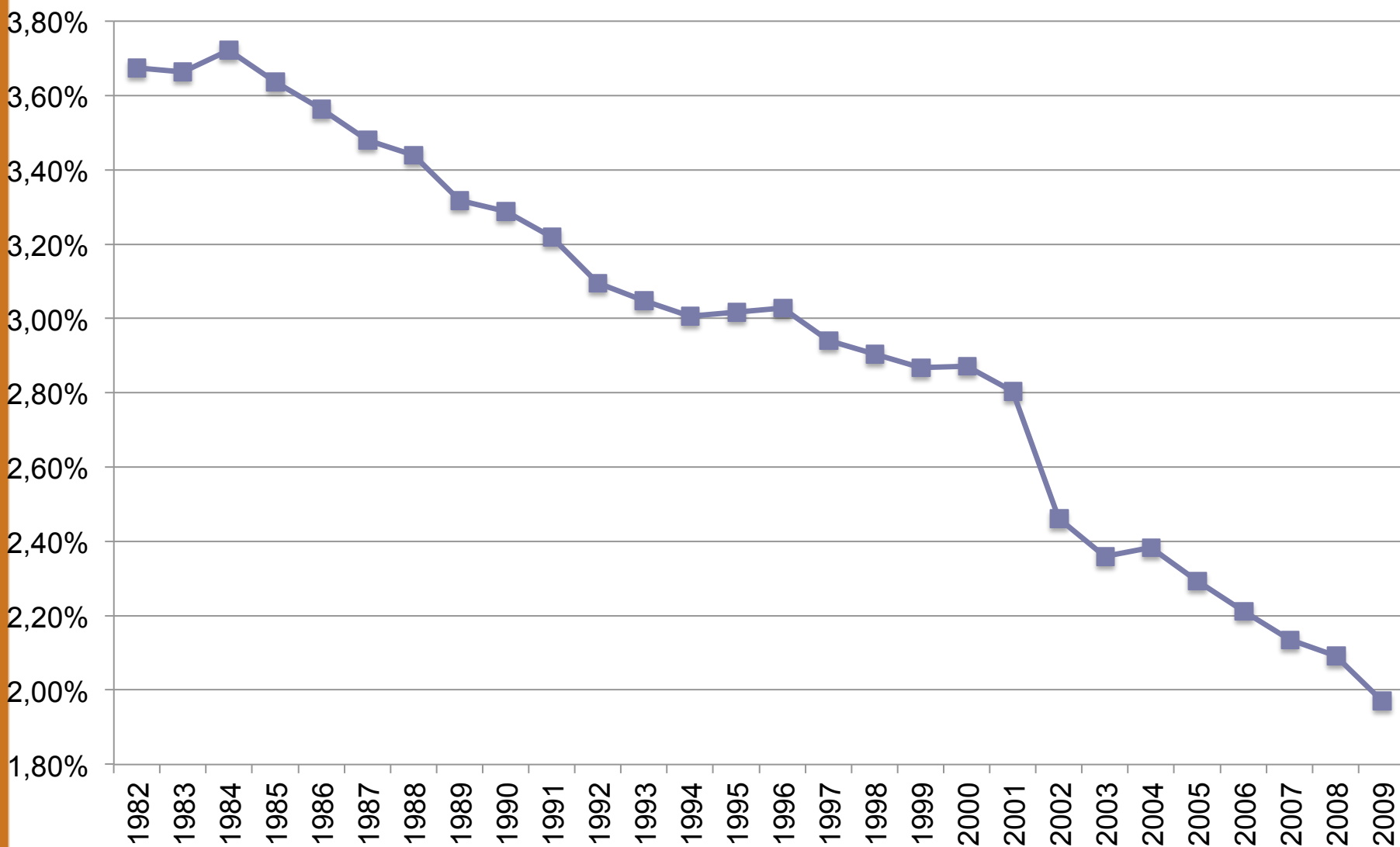


Source: ARL Statistics 2011-12 Association of Research Libraries, Washington, D.C.

# Total Student Enrollment in ARL Libraries 1982-2011



# Library Expenditures as a Percent of University Expenditures in 40 ARL Libraries 1982-2009



# The data and the models

- I hesitate to hang the future of libraries on a demonstrable effect size for the equation,

L = \$\$\$

— Rachel Applegate , Indiana University SLIS



# Why study value

- Faced with difficult economic times and university budget cuts, the value of the library to the wider goals of the university is increasingly questioned.

– Introduction to the Lib-Value Project

» [www.libvalue.org](http://www.libvalue.org)

# What's the effect?

- **Bangor University considers removing librarians** posted by [Blake](#) on Thursday January 27, @07:30AM -753 hits \_ \_

[Mā Information](#) writes *"News from the University of Wales Bangor in the UK. senior management no longer feel that subject librarians / academic liaison librarians are needed in the modern academic library. They have made restructuring proposals which include removing all but one of the subject librarians and a tier of the library management, including the Head of Bibliographic Services. The university management thinks that technology has 'deskilled' literature searching. As far as I know, this proposal is unprecedented in the United Kingdom. In essence, there will remain 4 professional librarians serving a 'research-led' university of 8,000 plus FTEs and with 8 library sites. These will be the university librarian, cataloguing librarian, acquisitions librarian and Law librarian.*

- *Has anything like this happened anywhere that you know of? If so, what have been the effects?*

# Assessment Librarian

# Assessment is...

“...a structured process to **learn** about communities and **evaluate** how well the library supports them.”

- *Steve Hiller, Director of Assessment & Planning  
University of Washington Libraries*

# Assessment can...

- Support decision making
- Establish accountability
- Strengthen organizational mission, goals, and objectives
- Realign library goals and mission statements with the needs of users
- Identify trends in user behaviors and technology
- Measure learning outcomes and impact
- Improve programs and services

# Good Analytical Skills needed

- Quantitative Analysis: IBM SPSS, SAS BI
- Qualitative Analysis: Atlas.ti, NVivo
- Data collection: Qualtrics, Survey Monkey, FormStack
- Data storage: SQL Server, Access, Excel
- Reporting: Crystal Reports, SPSS, SQL, Excel,
- Web delivery: interactive charts, analytics, Tableau, etc.
- Web development, usability, user experience?

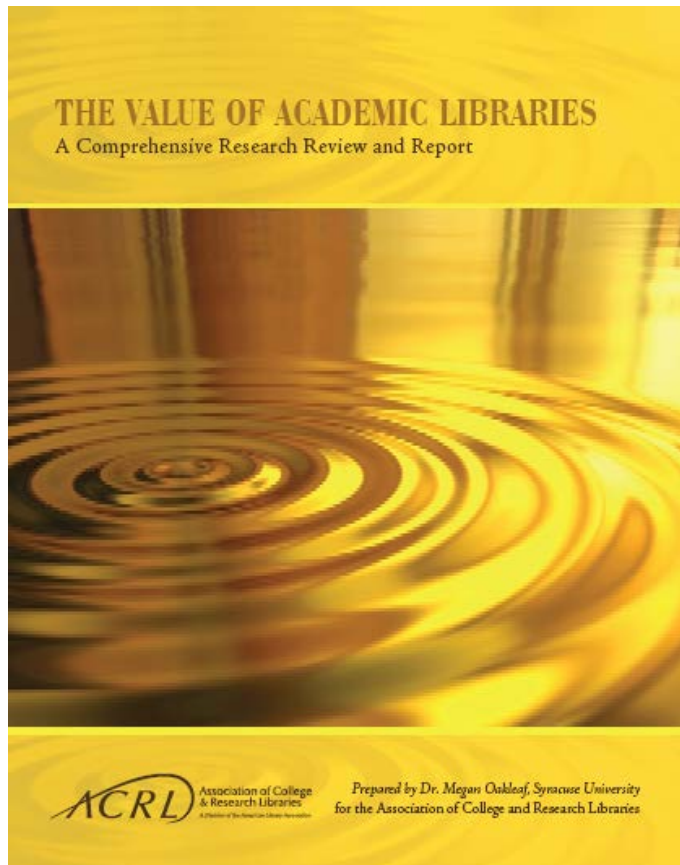
**arl-assess@arl.org**

- Anyone with an interest in library assessment
- Assessment librarians
- User Experience and Planning
- Anthropologists
- Space planners
- Functional area leaders involved in assessment (teaching and learning, special collections, spaces)

**Join the arl-assess google group**



# The Value of Academic Libraries



<http://www.acrl.ala.org/value/>



<http://www.rin.ac.uk/our-work/using-and-accessing-information-resources/value-libraries-research-and-researchers>

# ARL Profiles: Research Libraries 2010



- Serve the public good
- Expand globally
- Set standards
- Explore best practices
- Establish national and international visibility

# Ethnography

The art and science of describing a group,  
culture, or social process.

# For more information:

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Website: [www.erialproject.org](http://www.erialproject.org)  
& [www.andrewasher.net](http://www.andrewasher.net)

Toolkit: [www.erialproject.org/publications/toolkit/](http://www.erialproject.org/publications/toolkit/)

E-mail: [asherand@indiana.edu](mailto:asherand@indiana.edu)

Twitter: [@aasher](https://twitter.com/aasher)

Book: *College Libraries and Student Culture*  
(ALA Editions, 2012)





# StatsQUAL®

A gateway to library assessment tools that describe the role, character, and impact of physical and digital libraries.

## ARL Statistics®



ARL Statistics™ is a series of annual publications that describe the collections, expenditures, staffing, and service activities for Association of Research Libraries (ARL) member libraries.

## LibQUAL+®



LibQUAL+® is a rigorously tested Web-based survey that libraries use to solicit, track, understand, and act upon users' opinions of service quality.

## ClimateQUAL®



ClimateQUAL®: Organizational Climate and Diversity Assessment is an online survey that measures staff perceptions about: (a) the library's commitment to the principles of diversity, (b) organizational policies and procedures, and (c) staff attitudes.

## MINES for Libraries®



Measuring the Impact of Networked Electronic Resources (MINES) is an online transaction-based survey that collects data on the purpose of use of electronic resources and the demographics of users.

## LibValue



LibValue is a series of tested methods that capture Return on Investment and Value of library services.



## What is LibQUAL+®?

LibQUAL+® is a suite of services that libraries use to solicit, track, understand, and act upon users' opinions of service quality. These services are offered to the library community by the Association of Research Libraries (ARL). The program's centerpiece is a rigorously tested Web-based survey bundled with training that helps libraries assess and improve library services ... [more](#)

### THE BIRTH OF LibQUAL+®?

In 1999, Fred Heath and Colleen Cook, both then at Texas A & M University, realized that use of "input" variables, such as collection or serials counts, were limited as measures of library service quality... [more](#)

### THE LibQUAL+® SURVEY?

Since 2000, more than 1,000 libraries have participated in LibQUAL+® domestically and internationally, with participating institutions in Africa, Australia, Asia, and Europe.... [more](#)

### VIEW A SAMPLE SURVEY?

The LibQUAL+® survey is a two-page, web-based instrument. For more information about the survey instrument, [click here...](#)

## How will LibQUAL+® benefit your library users?

Library administrators have successfully used LibQUAL+® survey data to identify best practices, analyze deficits, and effectively allocate resources. LibQUAL+® gives your library users a chance to tell you where your services need improvement so you can respond to and better manage their expectations. Institutional data and reports enable you to assess whether your library services are meeting user expectations—and develop services that better meet these expectations.



## LibQUAL+® Top 10 Resources

A Google™ search on "LibQUAL+" yields approximately 100,000 hits, and more than 50 refereed journal articles have been published on the protocol. To use to learn about LibQUAL+®...

## Register for LibQUAL+®

Sign up and register here to start a LibQUAL+® survey.

[+ REGISTER NOW](#)

## NEWS

- [+ 12/15/2009: Launching New Website](#)
- [+ 9/22/2009: Register for the 2010 LibQUAL+® survey!](#)
- [+ 2/20/2009: LibQUAL+® Share Fair, Chicago, July 13, 2009: Call for Entries](#)

[+ MORE NEWS](#)

## EVENTS

- [+ 5/24/2010: 2010 LibQUAL+® and Beyond - Glasgow, Scotland](#)
- [+ 2/5/2010: 2010 Introduction to LibQUAL+® - London, England](#)
- [+ 1/18/2010: LibQUAL+® Training Sessions - Boston, MA](#)

[+ MORE EVENTS](#)

## PUBLICATIONS

- [+ Describing the Research Library of the 21st Century: The ARL Profiles](#)
- [+ Library Assessment Conference 2008, Seattle, Washington August 4-7: Recap & Evaluation](#)
- [+ Library Quality Assessment through LibQUAL+®](#)

[+ MORE RESOURCES](#)


# The Challenge

“The difficulty lies in trying to find a single model or set of simple indicators that can be used by different institutions, and that will compare something across large groups that is by definition only locally applicable—i.e., how well a library meets the needs of its institution. Librarians have either made do with oversimplified national data or have undertaken customized local evaluations of effectiveness, but there has not been devised an effective way to link the two”

*Sarah Pritchard, Dean of Libraries, Northwestern University*



# The LibQUAL+® Premise

**PERCEPTIONS**  **SERVICE**

“....**only** customers judge quality;  
all other judgments are essentially  
irrelevant”

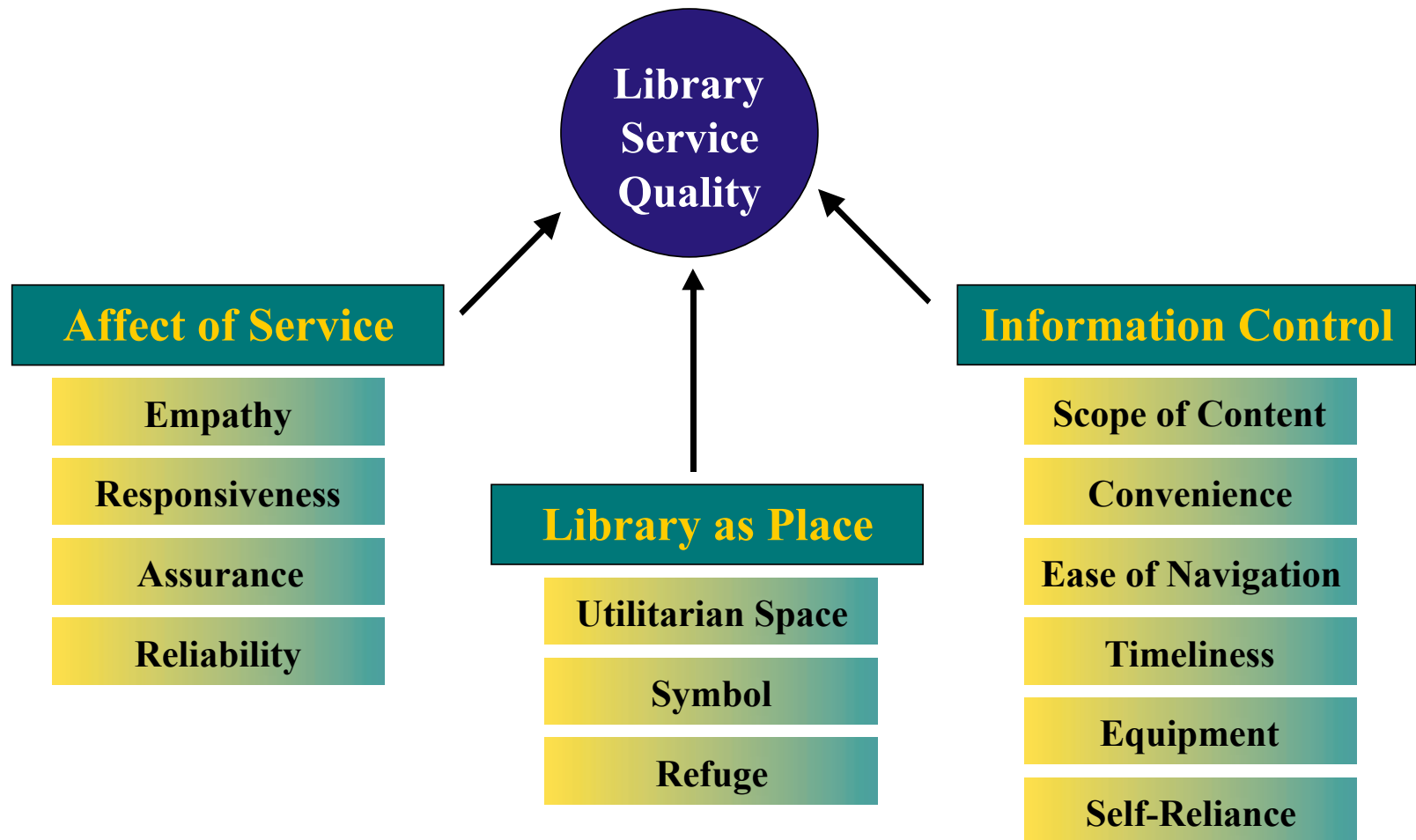
Note. Zeithaml, Parasuraman, Berry. (1999).  
Delivering quality service. NY: The Free Press.

# ...a revolution in the making

*Il est plus nécessaire d'étudier les hommes que  
les livres*

—FRANÇOIS DE LA ROCHEFOUCAULD (1613–1680)

# Dimensions of Library Service Quality



# Survey Structure (Detail View)

## Preview: ARL Sample 4-Year Institution Library Service Quality Survey

Please rate the following statements (1 is lowest, 9 is highest) by indicating:

*Minimum* -- the number that represents the *minimum* level of service that you would find acceptable

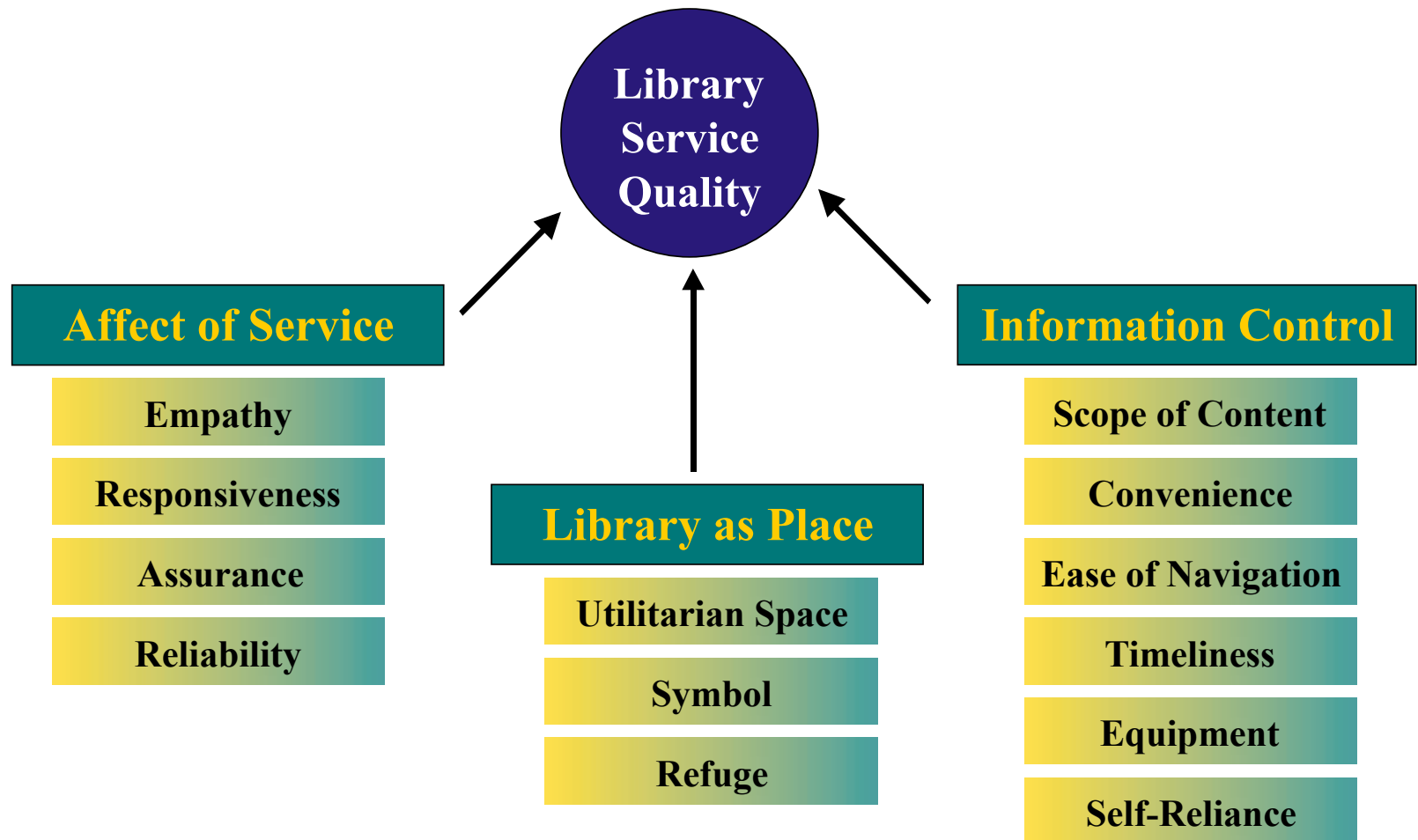
*Desired* -- the number that represents the level of service that *you personally want*

*Perceived* -- the number that represents the level of service that *you believe* our library currently provides

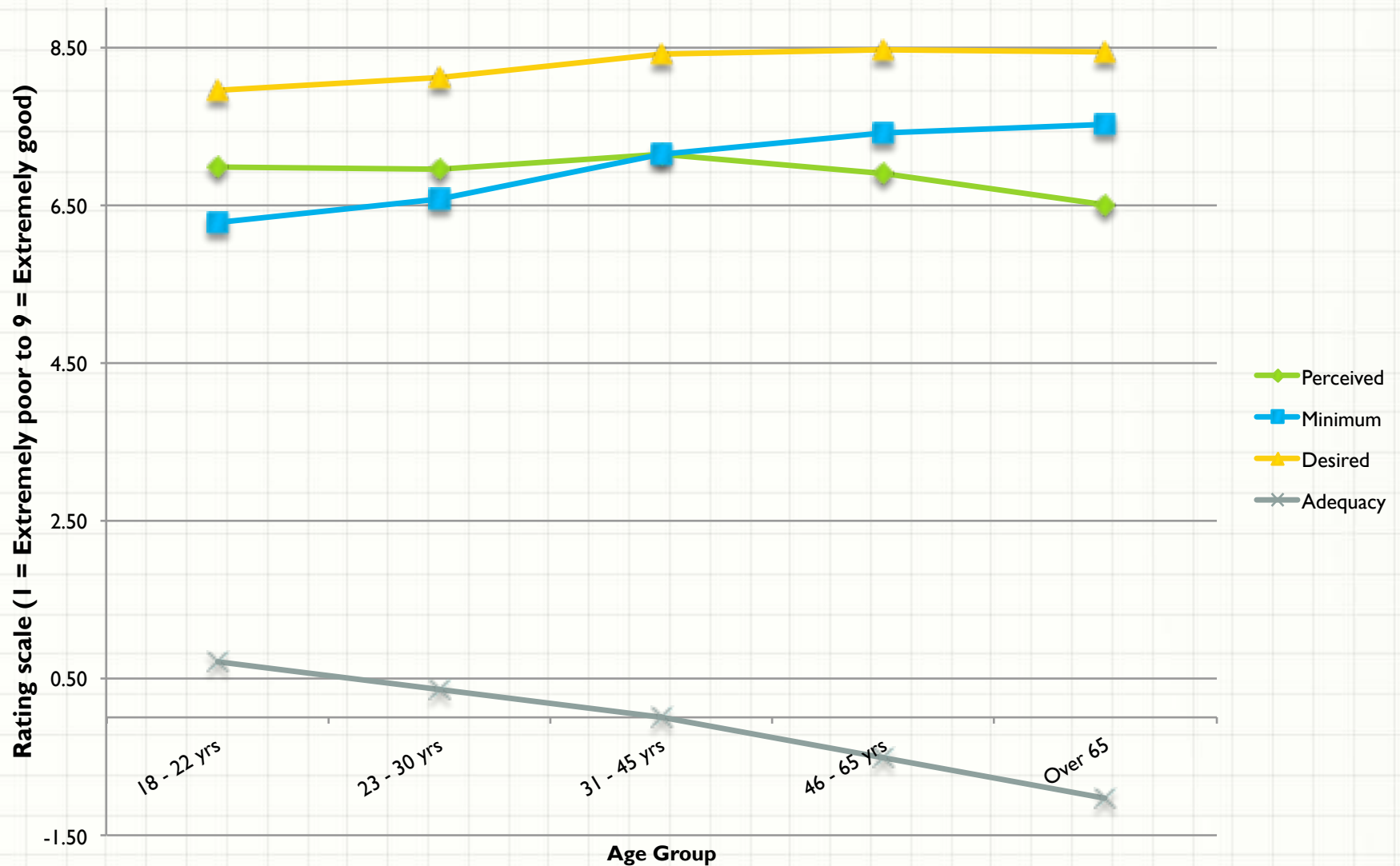
For each item, you must EITHER rate the item in all three columns OR identify the item as "N/A" (not applicable). Selecting "N/A" will override all other answers for that item.

When it comes to...		My Minimum Service Level Is		My Desired Service Level Is		Perceived Service Performance Is		
		Low	High	Low	High	Low	High	N/A
1)	Employees who instill confidence in users	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9		<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9		<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9		<input type="checkbox"/> N/A
2)	Easy-to-use access tools that allow me to find things on my own	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9		<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9		<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9		<input type="checkbox"/> N/A
3)	Print and/or electronic journal collections I require for my work	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9		<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9		<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9		<input type="checkbox"/> N/A
4)	Readiness to respond to users' questions	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9		<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9		<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9		<input type="checkbox"/> N/A
5)	Quiet space for individual activities	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9		<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9		<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9		<input type="checkbox"/> N/A
When it comes to...		My Minimum Service Level Is		My Desired Service Level Is		Perceived Service Performance Is		
		Low	High	Low	High	Low	High	N/A
6)	Convenient access to library collections	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9		<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9		<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9		<input type="checkbox"/> N/A
7)	Willingness to help users	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9		<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9		<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9		<input type="checkbox"/> N/A

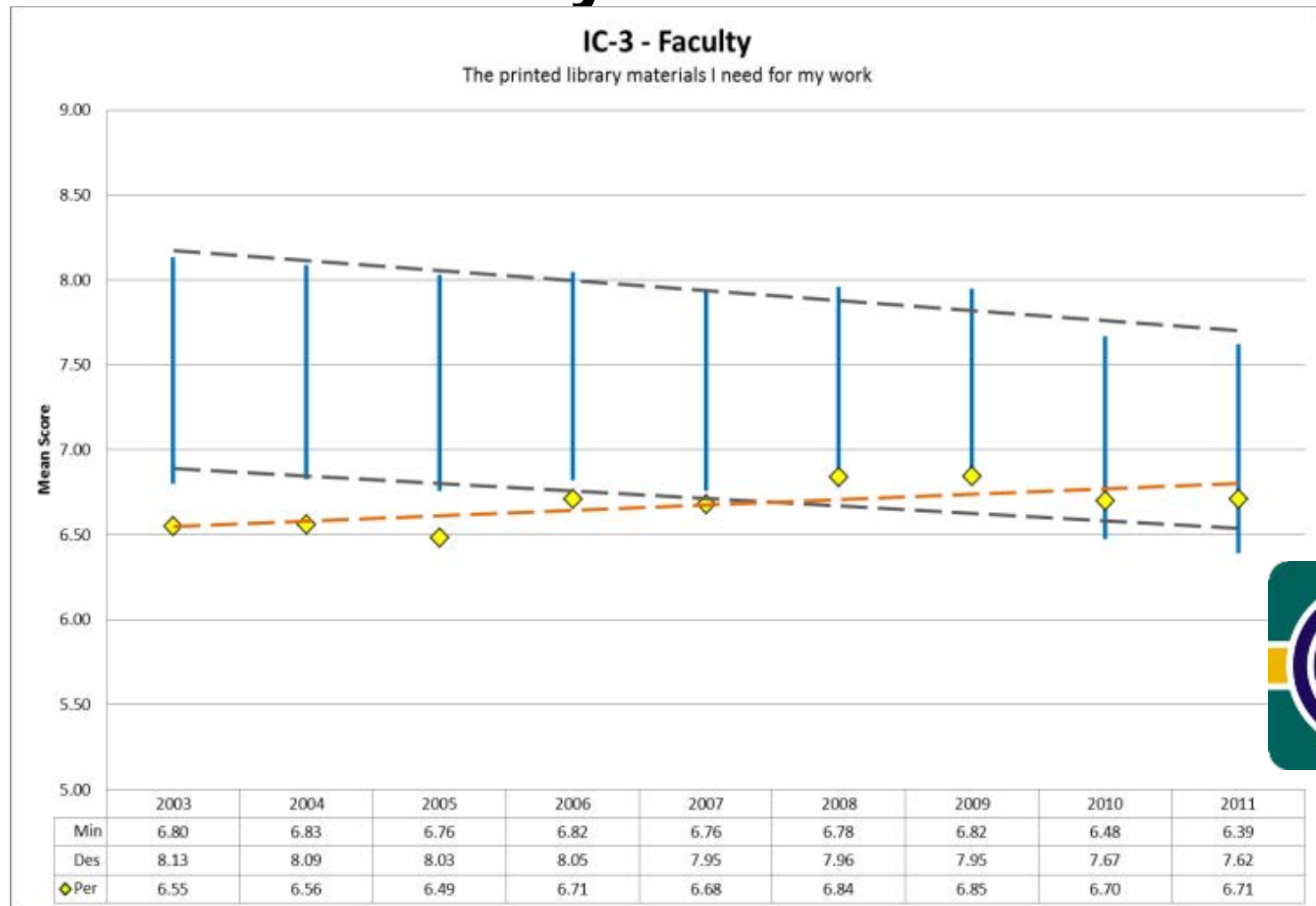
# Dimensions of Library Service Quality



## A library Web site enabling me to locate information on my own

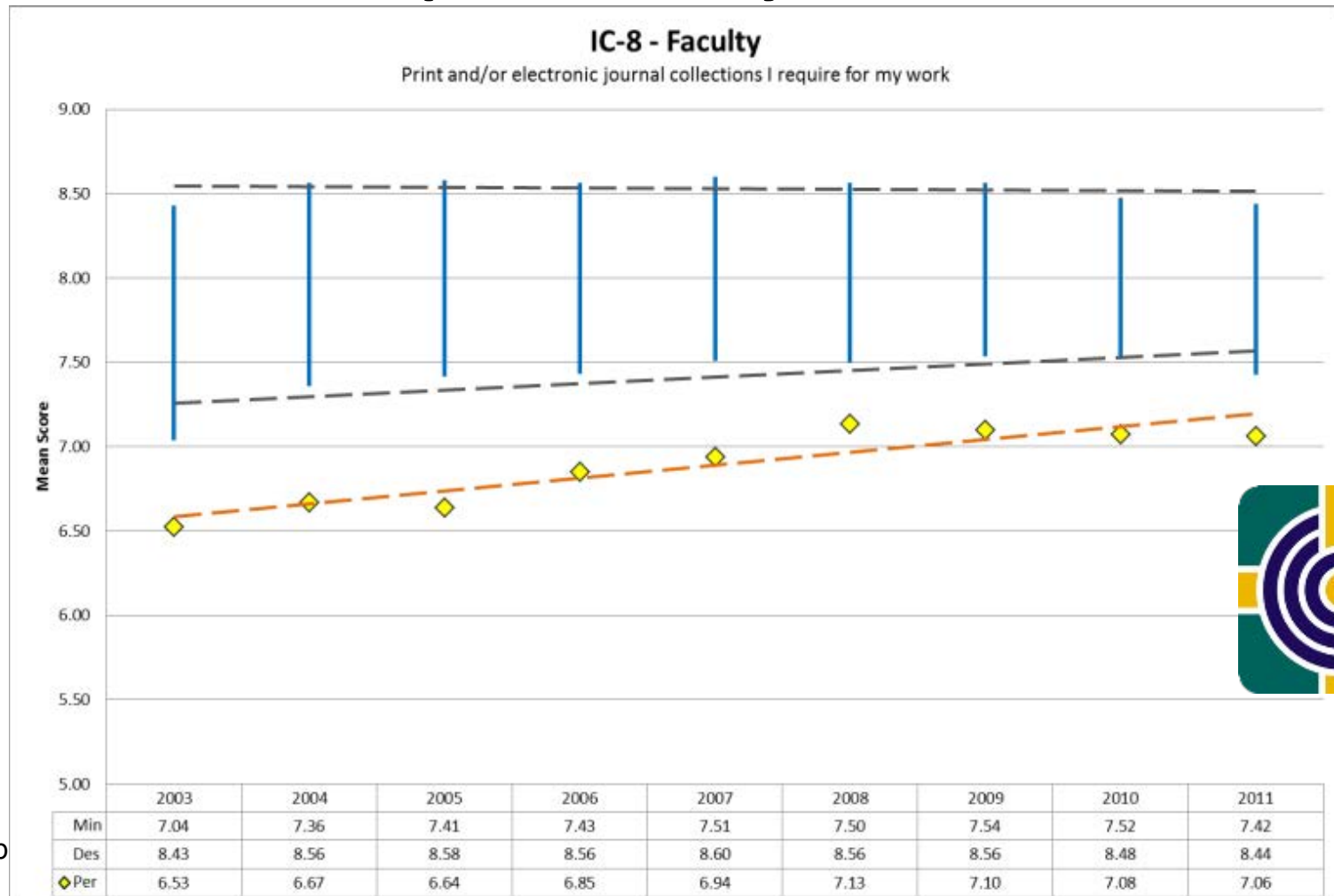


# The Printed Library Materials I Need for My Work

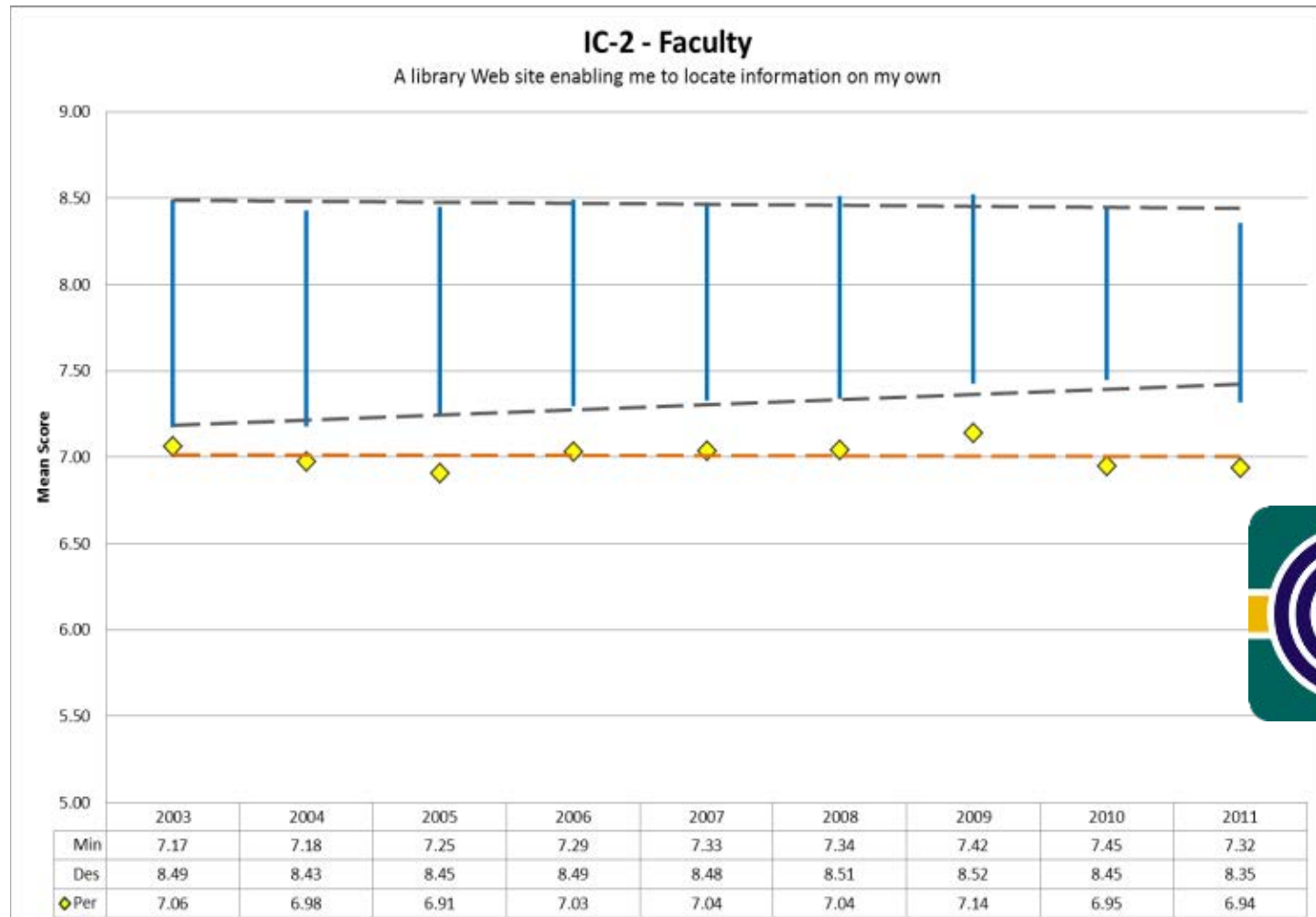




# Print and/or Electronic Journal Collections I Require for My Work



# A Library Website Enabling Me to Locate Information on My Own



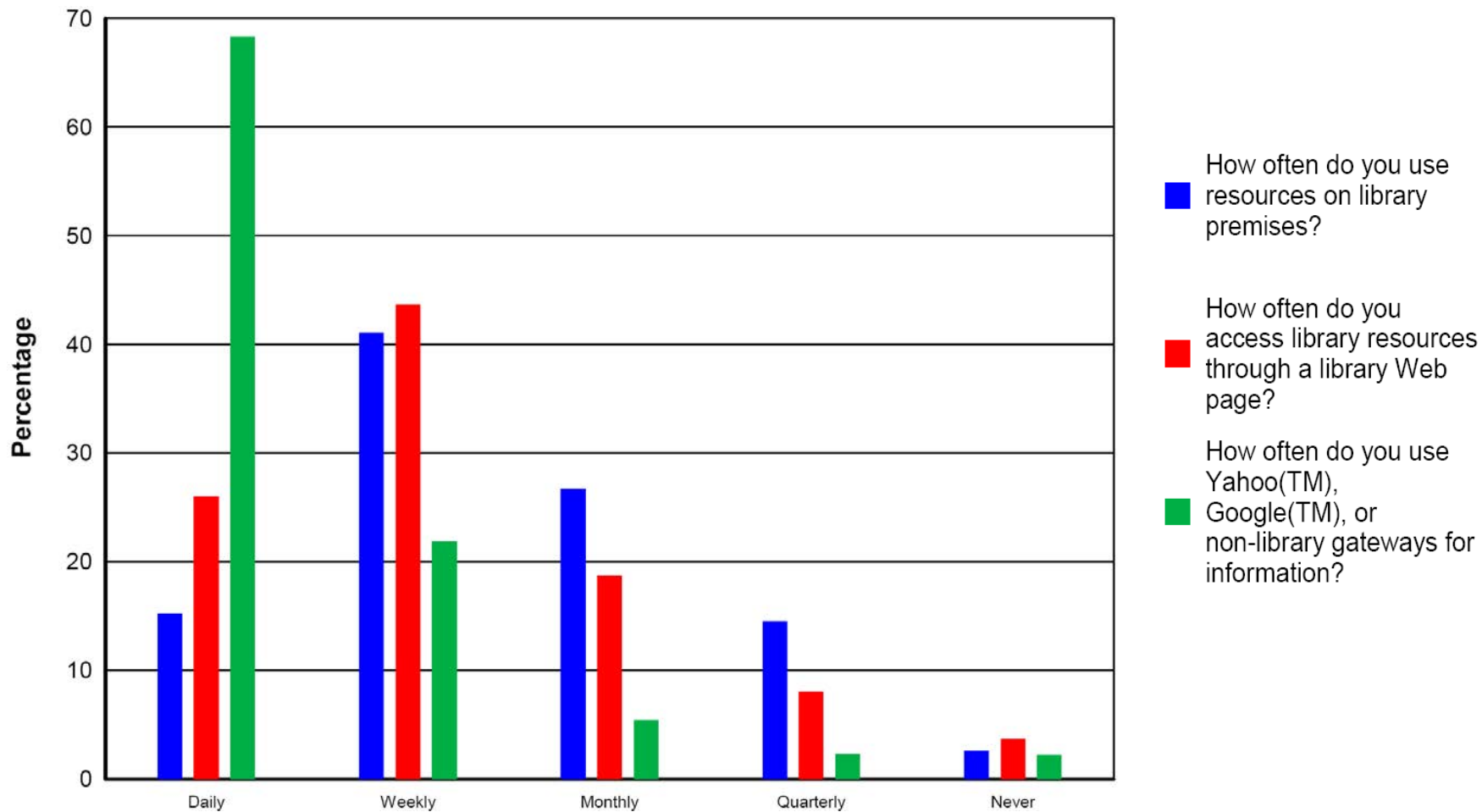
# Library Service Quality on a global scale



# Contributions

- LibQUAL+® methodology focuses on success from the user's point of view (outcomes)
- Demonstrates that a Web-based survey can handle large numbers; users are willing to fill it out; and survey can be executed quickly with minimal expense
- LibQUAL+® requires limited local survey expertise and resources
- Analysis available at local and inter-institutional levels
- Many opportunities for using demographics to discern user behaviors

# Use is not Value?



# LibValue

Multiple institutions using multiple methods to measure multiple values for multiple stakeholders



# Return on investment in a strict sense...

...is a quantitative measure expressed as a ratio of the value returned to the institution for each monetary unit invested in the library.

## Return on investment is also...

...values of all types that come to stakeholders and the institution from the library's collections, services, and contribution to its communities.



# LIBValue Webcasts

- ▶ Scholarly Reading
- ▶ Teaching and Learning
  - ▶ eBooks
  - ▶ Special Collections
  - ▶ Commons
- ▶ Comprehensive value
- ▶ Coming: LibValue Toolkit: [www.libvalue.org](http://www.libvalue.org)

» ARL YouTube Channel



# Changing Higher Education Landscape

- Outcomes-based budget
- Complete College Act, 2010
- A Top 25 Mandate, 2009



Tennessee Higher Education Commission

*Richard G. Rhoda, Executive Director*

**Vol Vision**

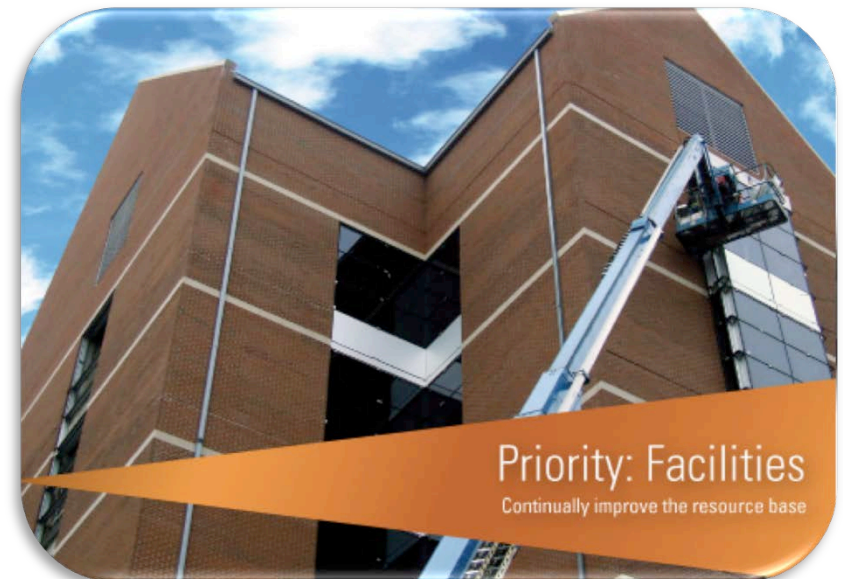
**TOP 25**



# New University Strategic Plan

## The Five Top 25 Strategic Priorities

- Undergraduate Education
- Graduate Education
- Research and Creative Activity
- Faculty and Staff
- Infrastructure and resources

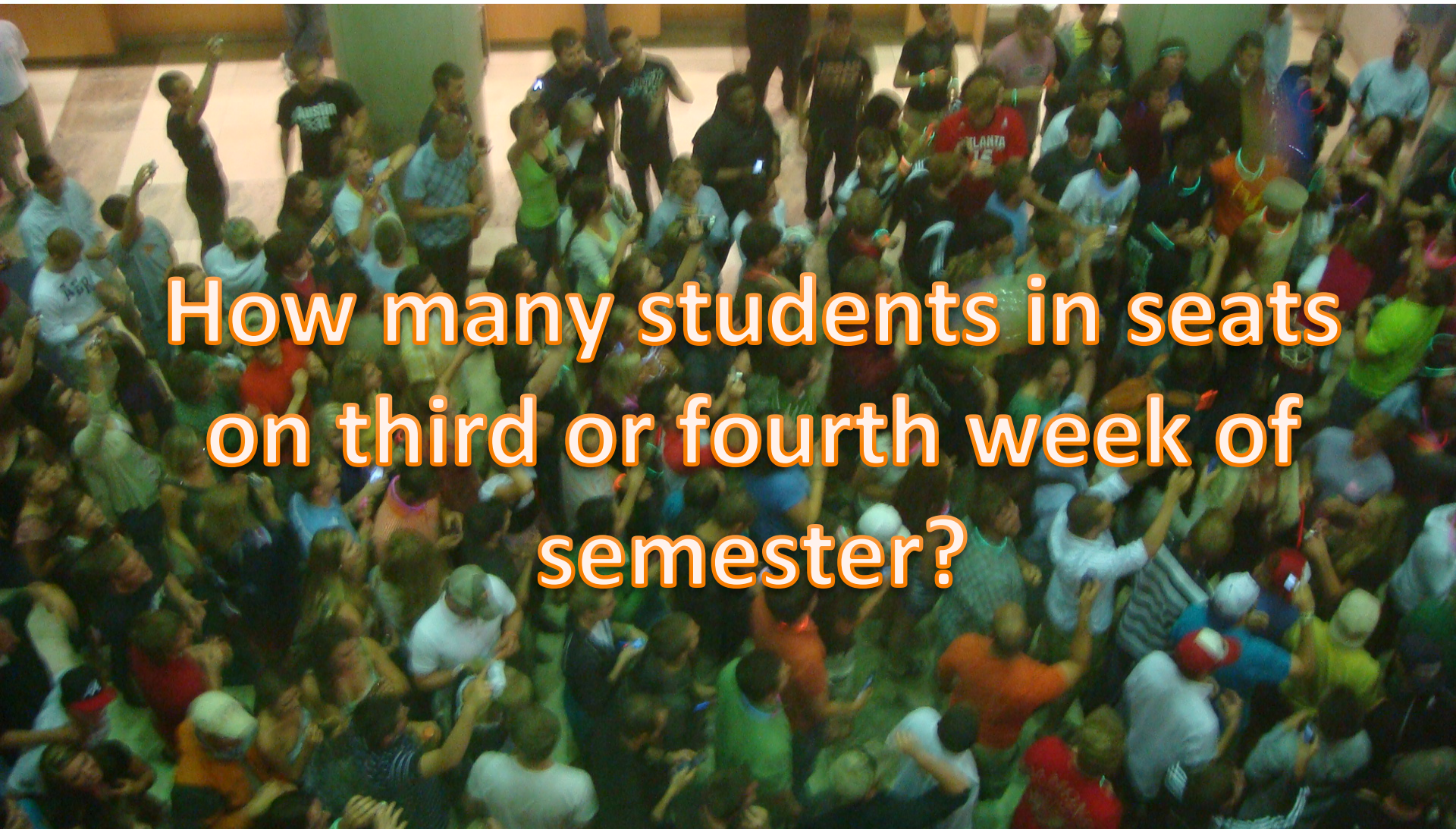






Instead of . . . .

How many students in seats  
on third or fourth week of  
semester?





# UT Libraries' Strategic Plan

## UNIVERSITY LIBRARIES 3- TO 5-YEAR STRATEGIC PLAN

### MISSION STATEMENT

WE EMPOWER **BIG IDEAS**

### VISION STATEMENT

WE ARE THE CAMPUS MAIN STREET AND  
THE CROSSROADS FOR INNOVATION,  
SCHOLARSHIP, LEARNING, AND CIVILITY.

### CORE ATTRIBUTES / VALUES

- WE HAVE HEART, SMARTS, AND NERVE.
- WE ARE RESPONSIBLE, HONEST, AND OPEN.
- WE LISTEN, SERVE, AND ENGAGE.

### FIVE AREAS OF STRATEGIC EMPHASIS

#### Teaching and Learning

(Vol Vision Imperatives 1, 2, & 5)

- Engage in transformative partnerships in instruction
- Develop and maintain robust facilities in support of teaching and learning

#### Research Support, Discover, and Access

(Vol Vision Imperatives 4, 5, & 3)

- Develop robust, user-driven, and user-centered
- Maintain campus leadership in open access, intellectual property, and rights policy

#### The 24-Hour Intellectual and Social Hub

(Vol Vision Imperatives 1 & 5)

- Provide services, activities, and resources to welcome and acclimate students to the university community and to enhance the college experience
- Provide safe, secure, and inspiring spaces
- Maximize and diversify user space to more fully support the widest range of user needs





# UT Libraries' Strategic Plan

## UNIVERSITY LIBRARIES 3- TO 5-YEAR STRATEGIC PLAN

### MISSION STATEMENT

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- WE HAVE HEART, SMARTS, AND NERVE.
- WE ARE RESPONSIBLE, HONEST, AND OPEN.
- WE LISTEN, SERVE, AND ENGAGE.

### FIVE AREAS OF STRATEGIC EMPHASIS (all guided by evidence-based, data-supported assessment)

#### Teaching and Learning

(Vol Vision Imperatives 1, 2, & 5)

- Engage in transformative partnerships in instruction
- Develop and maintain robust facilities in support of teaching and learning

#### Research Support, Discover, and Access

(Vol Vision Imperatives 4, 5, & 3)

- Develop robust, user-driven, and user-centered
- Maintain campus leadership in open access, intellectual property, and rights polic

#### Digital Initiatives, Scholarly Communication, and Technology Innovation

(Vol Vision Imperatives 3, 4, & 5)

- Lead new initiatives in data curation

#### The 24-Hour Intellectual and Social Hub

(Vol Vision Imperatives 1 & 5)

- Provide services, activities, and resources to welcome...

#### Outreach and Marketing

(Vol Vision Imperatives 1-5)



# The old paradigm

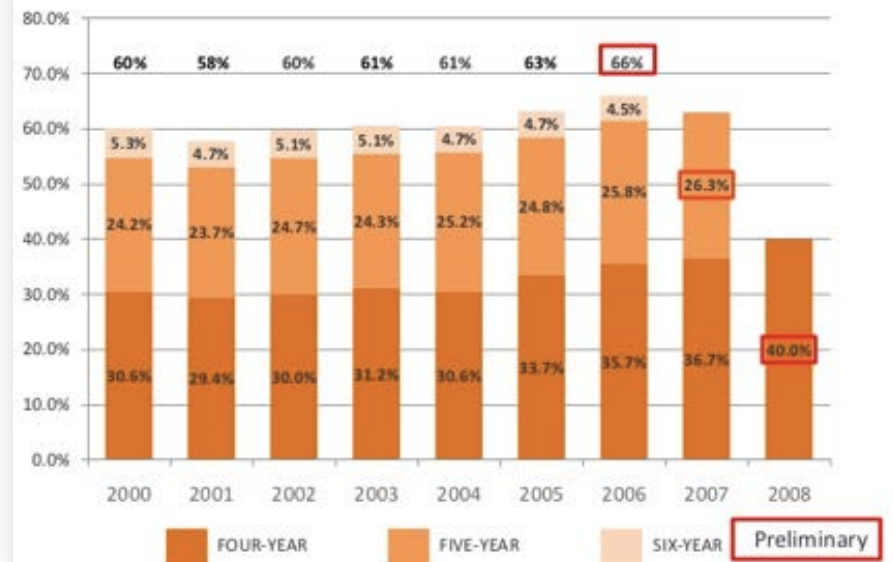
- Comparables
  - “X is like us, so we should have their budget.”
- Stoke Rivalries
  - “We must be better than X.”
- Inflation factor
  - “Let’ s scare ‘em with scary inflation numbers.”



# The New Paradigm: Student success outcomes (mostly)

- Recruitment
- Diversity
- Retention
- Graduation Rates (4 & 6 year)
- Out placement

## Graduation Rates





## LibValue and ROI

**Not a moment too soon!**



# Commons Spaces

- Learning Commons
  - Collection of resources and services
    - Different styles of learning and studying
    - Technology
    - Groupwork
    - Interrelationship of services for students





# Commons Spaces & Student Success

*Assess the value of library resources and services in the Commons in support of the instructional mission of the University*

- ① Define “success”
- ② Aggregate available data
- ③ Gather new information
- ④ Make meaningful connections





# Aggregate Existing Data

## ① Existing Data

- Automatically collected usage data
- Data collected in person by service providers
- Demographic data on retention, success, and years to graduation
- Student exit surveys
- LibQual
- NSSE survey data
- UT Fact Book



# Gather New Data

## ① Existing Data

- Automatically collected usage data
- Data collected in person by service providers
- Demographic data on retention, success, and years to graduation
- Student exit surveys
- LibQUAL+
- NSSE survey data
- UT Fact Book

## ② Needed Data

- Student-reported use of Commons spaces and services
- Student-reported value of Commons spaces and services
- Augmented university data set including the ability to track individual progress toward degree data
- Admissions data






# Linking Survey Responses to Student Data


## Human Subjects

- Family Educational Rights & Privacy Act
- Compliance with state and federal regulations

the UNIVERSITY of TENNESSEE  KNOXVILLE

**CONSENT: Basic elements**

- a statement that the study involves research
- the purposes of the research
- the duration of the subject's participation
- procedures to be followed

the UNIVERSITY of TENNESSEE  KNOXVILLE

**Parts of a "Form B"**

- I. Identification of Project
- II. Project Objectives
- III. Description and Source of Research Participants
- IV. Methods and Procedures
- V. Specific Risks and Protection Measures
- VI. Benefits
- VII. Methods for Obtaining "Informed Consent" from Participants
- VIII. Qualifications of the Investigators
- IX. Facilities and Equipment to be Used in Research
- X. Responsibility of the Principal Investigator





# Protecting Subjects

- You must be 18 or older to participate.
- Within the survey we ask for your UT NetID to use to retrieve and link admissions and progress-towards-degree data about you to the survey results. Your NetID will be removed from the survey data before the data is retrieved. The Office of Institutional Research and Assessment will oversee the data retrieval.
- Data on a protected server.
- Confidentiality of data. Data reported anonymously.

# Gym Bags and Mortarboards

- Student success measures
  - First Year Retention and 5 year graduation
- 5211 students in sample (2001)
- Found that if a student used CRF 25 times over the semester, increased a student's predicted probability of first year retention by 1% and predicted probability of 5 year graduation by 2% (pg. 59)

# Layers of Data

**Office of Institutional Research Performance Data  
Term and Cum GPA, Retention**

**Office of Institutional Research Demographics Data  
College, Level, Major, Gender, Ethnicity, Age**

**Libraries Data (13 Access Points)  
Circulation, Digital, Instruction, Reference, and Workstation**

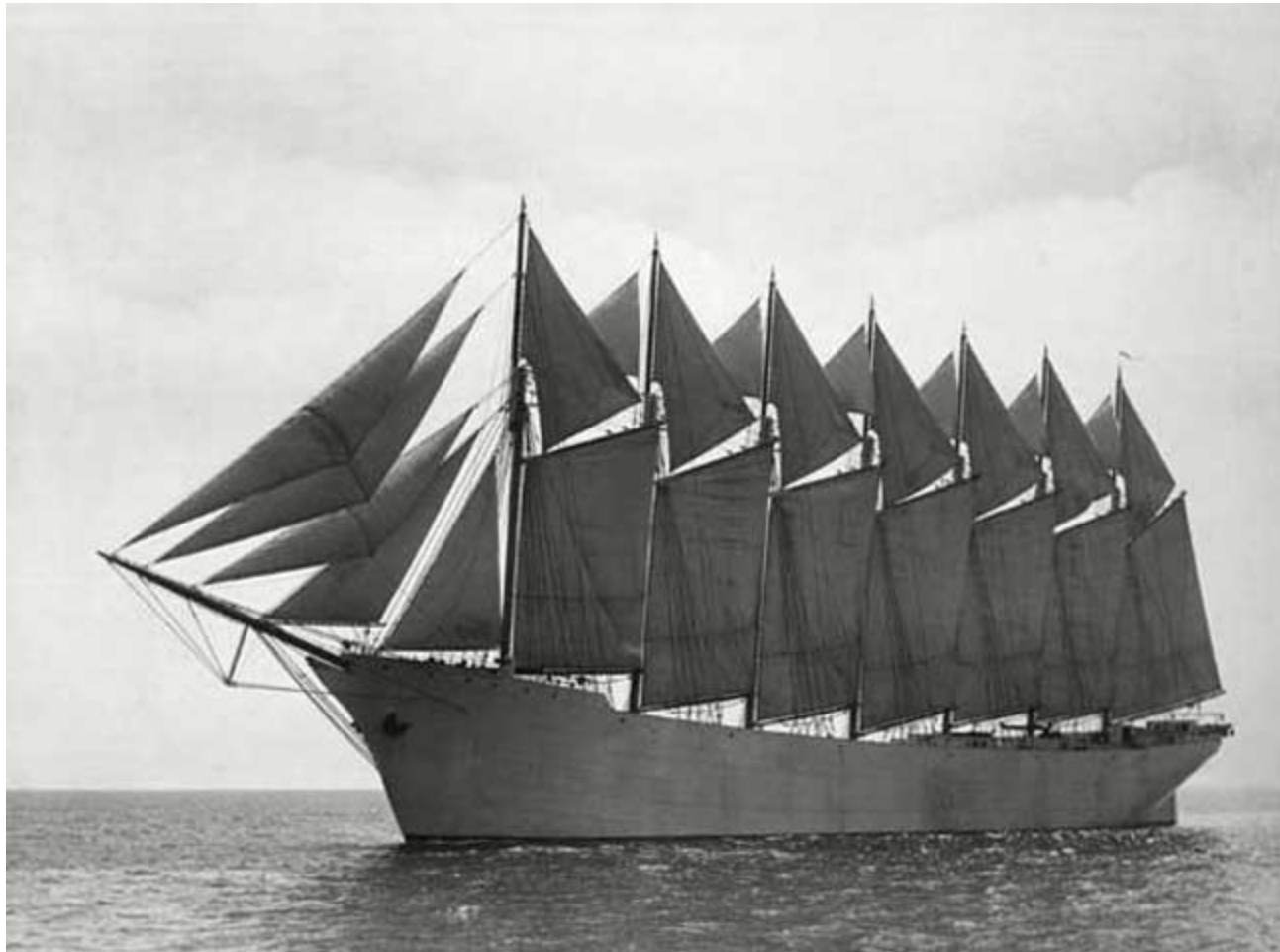
# **Library Cube**

## **University of Wollongong**

[http://www.youtube.com/watch?v=Z9UNtiO\\_KMQ](http://www.youtube.com/watch?v=Z9UNtiO_KMQ)

# ARL Strategic Thinking and Design

## Competency Trap exemplified by Thomas W. Lawson



# Value and strategy

- How can you use LibValue results strategically?

# Each strategy has driver and outcome measures

## Outcomes

Results-oriented measures. It is difficult to have an impact on these measures directly.

### Mission

What is our plan to achieve our mission and vision?

### Customer Perspective

"To achieve our mission, how must we look to our customers?"

### Financial Perspective

"If we succeed, how will we look to our donors or taxpayers?"

## Drivers

Input-oriented measures. Progress against these measures should have an impact on the outcome measures.

### Internal Perspective

"To satisfy our customers and financial donors, which business processes must we excel at?"

### Learning and Growth Perspective

"To achieve our mission, how must our organization learn and improve?"



# Strategy Map: TEAM responsibilities

**Mission:** KSL is the knowledge and creativity commons of CWRU

## Customer Perspective

**I.2.** Expand availability of and access to scholarly content

**I.3.** Define and deploy a digital learning and research strategy

**I.5.** Become the campus destination for intellectual pursuits

## Financial Perspective

**T.2.** Grow services through an expanded development program

**I.2.** Create a new library materials allocation formula

Create financially sustainable services

## Services and Collection

**I.2.** Expand the scope of special collections and explore opportunities to grow the use of archival materials

**C.1.** Strengthen external content partnerships

## Connection

**C.2.** Create a strategic alumni and community engagement plan

**I.4.** Increase student fluency in knowledge discovery and processing

## Creation and Curation

**I.1.** Transform the design and delivery of services by engaging in research to understand needs of CWRU community

**D.1. & D.2.** Create and implement global resources and diversity plan

## Learning And Growth

Effectively implement reorganization and strategic plan implementation

**T.1.** Implement service assessment and accountability to the CWRU community

**Vision:** KSL will be the information laboratory for knowledge collection, connection, creation and curation

# Libraries and Cultural Resources inspires its communities to discover, explore, and create knowledge through innovative collections, technologically advanced facilities, and engaged expertise. [15 May 2012]

## “We want our communities to say that Libraries and Cultural Resources ... “

Enables innovation in research, scholarship and creative works

Engages communities with programs and services welcoming to all

Is a factor in recruitment and retention

Fosters interdisciplinary discovery [i.e. puts the Universe in University]

## “Financially we need to... “

Develop a sustainable business plan

Focus on resources and services with a high ratio of value to cost

Implement a targeted community partnerships and development program

## “Internally we will focus on...”

### Communications by ...

Developing a proactive and responsive marketing strategy

Improving formal and informal communications

### Program Management by ...

Maximizing opportunities for discovery

Enhancing the user experience

Coordinating programs and services across Libraries and Cultural Resources

Promoting active outreach

### Operations Management by ...

Employing innovative means, models and technological solutions in the selection and delivery of programs and services

## “To be ready for the future we must....”

Foster strategic staff development

Support a culture of “Yes we can”

Promote a culture of collegiality, respect and recognition

# Town and Kyrillidou (2013)

- The value which stakeholders seek from libraries is transcendent, in the sense that the impact demonstrated must be beyond the library and immediate satisfaction or fulfillment. Library assessment effort to date has been (mainly) about quality rather than value.

# A Value Scorecard








- Relationship & reputation capital
- Organisational capital
  - Tangible assets and resources
  - Intangible and meta-assets
- Library virtue
  - Impact and social capital
- Library momentum



## What is Important to Your President?

(Hint: It's not the number of books you check out.)

### Extraordinary Achievements\*

	Freshman ACT score (avg.)	21.4	23.2	25.2	N/A
	6-year graduation rate	30.1%	33.0%	52.1%	60.5%
	Baccalaureate degrees awarded	1,734	1,849	2,731	3,197
	Number of students living on campus	1,725	2,363	4,725	N/A
	Doctoral degrees awarded	76	90	140	272
	Research expenditures	\$39.1M	\$80.9M	\$186.2M	\$310.3M
	Endowed chairs & professorships	35	87	153	N/A

UNIVERSITY OF  
LOUISVILLE.

\*2013 data are considered preliminary pending final audit and reconciliation.

\* September 15, 2013 is the official census date for university housing



# Clear targets: Questions behind Decisions

	Past	Present	Future
Information	<b>What happened?</b> (Reporting)	<b>What is happening now?</b> (Alerts)	<b>What will happen?</b> (Extrapolation)
Insight	<b>How and why did it happen?</b> (Modeling, Experimental Design)	<b>What's the next best action?</b> (Recommendation)	<b>What's the best /worst that can happen?</b> (Prediction, Optimization, Simulation)

*Robert Morison, Analytics at Work*

# Final Blessings

- Indulge your curiosity
- Influence your friends
- Enable your organization.
  - May your analytics always be good – and your judgment even better.
    - » *Robert Morison, Analytics at Work*



# Some current issues

- Importance of internal relationships and external partnerships
- Extension of traditional role
  - Research publication and research data
- Sustaining our academic role in planning
- Digital media, services and curation
- Capability, capacity and critical mass
- Library as reputational enhancer ...

A photograph of the Suzzallo Library in Seattle at night. The building is a large, ornate Gothic Revival structure with many tall, arched windows that are brightly lit from within, casting a warm glow. The facade is made of light-colored stone or brick. In the foreground, there is a paved plaza and a body of water reflecting the lights. A fountain is visible on the left side of the image.

# LIBRARY ASSESSMENT CONFERENCE

BUILDING EFFECTIVE, SUSTAINABLE, PRACTICAL ASSESSMENT

SEATTLE, WASHINGTON  
AUGUST 4-6, 2014  
[www.libraryassessment.org](http://www.libraryassessment.org)

Image of Suzzallo Library © Christopher Dube, [www.flickr.com/photos/chrusdube](http://www.flickr.com/photos/chrusdube)

<http://www.arl.org>

# Thank you