

Library Assessment Plan

UFV Library

October 28, 2024

Purpose

Our assessment efforts are driven by a desire to provide the best service, resources, and physical spaces to serve the diverse community at UFV.

Assessment allows us to:

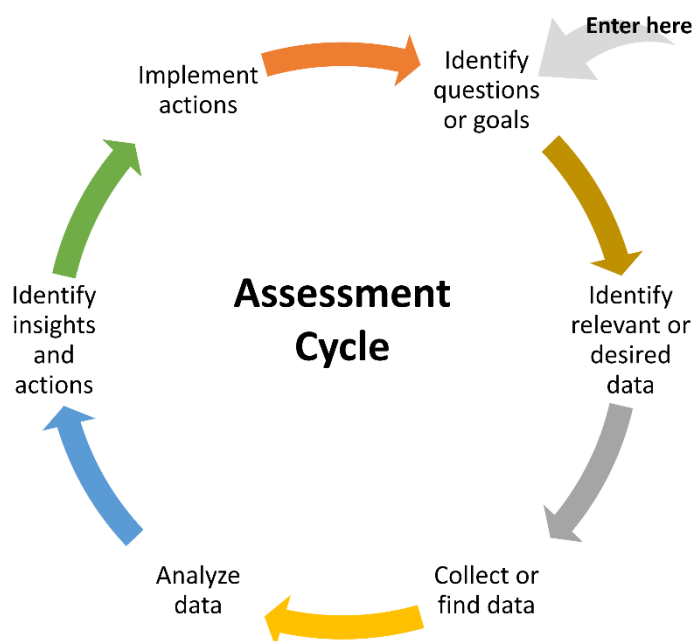
- build on prior strengths and achievements;
- demonstrate and communicate the impact of the library's collections, services, spaces and operations in supporting the goals of the university; and
- advocate for the resources required to effectively meet the needs of library users and the university community.

We use assessment activities to identify how we could improve library performance, priority-setting and decision-making.

Theory

At its most basic level, assessment in libraries can be seen as using data with intent. The diagram shown here identifies the various stages that are part of the assessment cycle:

1. Identify questions or goals: this is where we typically enter the assessment cycle; what is it we want to learn more about or achieve?
2. Identify relevant or desired data: what data will best lead us to insights or actions?
3. Collect or find data: is the data already available, or do we have to collect it (and how will we collect it)?



4. Analyze data: what does the data tell us?
5. Identify insights and actions: what do we need to do to move forward? What resources are necessary?
6. Implement actions: what resources are needed, and who will do it?
7. Repeat: how successful or effective were the actions taken?

The primary goal of the UFV Library's assessment activities is to gain insight from the data we choose and collect, with the insights driven by one or more of these perspectives:

- assessment as learning;
- data-informed decision making; and
- data as storytelling.

Assessment as Learning

Assessment as learning allows us to engage in a process of continuous improvement. Rather than taking a snapshot of where we are at a particular point in time, we gain insight from examining data regularly and using that data to make incremental improvements, albeit always with long term goals and outcomes in mind. In this way, we develop a strong culture of assessment throughout the library.

Data-informed Decision-Making

Unlike data-driven decision-making, which seeks to primarily use objective evidence (e.g., facts, metrics) to arrive at a decision or course of action, data-informed decision-making pairs objective evidence with intuition, experience, judgment, and qualitative input to make user-focused decisions. In data-informed decision making, we seek to derive insight from a wide variety of data.

Data as Storytelling

Storytelling is an effective way to communicate value and insight arising from data. It is particularly useful to those outside the library field, as it can convey information in ways that are both understandable and powerful, and at the same time brief. Storytelling with data pairs visual imagery (i.e., data visualizations) with brief textual descriptions (i.e., insights).

Links to Strategic Documents

Library Strategic Plan, 2022-2027

Link: <https://library.ufv.ca/about-the-library/strategic-plan/>

The UFV Library has identified the following strategic areas:

- Empowering users by improving faculty and department relations, demonstrating value, and building student connections
- Positioning the library by revising physical space, enhancing technology access and relationships, and revitalizing teaching and learning
- Catalyzing change by streamlining operations to create workload balance, modernizing policies, and prioritizing EDIIDA (equity, diversity, inclusion, indigenization, decolonization, and accessibility).

Íyáqáwtxw, UFV's 2021-2026 Integrated Strategic Plan

Link: <https://www.ufv.ca/strategic-planning/>

The library's strategic priorities are informed the university's mission of:

- Engaging learners (Yoystexw ye totilthet) by providing inclusive learning environments for everyone;
- Transforming lives (Ayeqet kw'e shxwaylexws) by providing opportunities for people to discover, develop, and share their gifts while also recognizing and celebrating the gifts of others; and
- Building community (Thayt kw'e st'elt'elawtexw) by collaborating and partnering in pursuits that enrich the lives of all people on our campuses, in our local communities, and beyond.

Other Institutional Plans and Documents

Equity, Diversity and Inclusion Action Plan

Link: <https://www.ufv.ca/president/presidents-task-force-on-equity-diversity-and-inclusion/equity-diversity-and-inclusion-action-plan/>

- Integrate EDI into our institutional culture so that all members of the UFV community can thrive in their education, career, and leadership roles at UFV
- Integrate inclusive excellence throughout UFV in teaching, research, service and community engagement
- Embed the principles of EDI within the policies and processes at UFV

Institutional Learning Outcomes

Link: <https://www.ufv.ca/ilos/>

- Apply knowledge and competencies proficiently: “Learners develop knowledge and information literacy, skills, and competencies within and across discipline and knowledge systems. They access, organize, and examine written, oral, visual, and numerical information. Learners use and share knowledge responsibly and ethically, abiding by legal restrictions and cultural protocols for published, confidential, and/or proprietary information. Learners demonstrate technical proficiency and effectively apply knowledge in a variety of situations.”
- Examine critically and holistically: “Learners use critical and creative thinking strategies, drawing on multiple perspectives and experiences to examine problems. ... Learners pose questions and propose solutions using multiple literacies (digital, technical, media, and language-based) to develop a fuller understanding of concepts.”
- Communicate effectively: “Learners communicate ideas and build connections using a variety of oral, written, digital, and visual strategies. They listen attentively, seek clarification, and are open to other points of view. They effectively present information using a variety of technologies, modes, and media.”
- Engage with Indigenous knowledge systems: “Learners engage with diverse Indigenous worldviews, perspectives, and knowledge systems. ... Learners value and respect the knowledge held by Indigenous Peoples and understand that much of that knowledge is misrepresented and absent in commonly available resources and media due to colonization.”
- Engage in reflection for action: “Learners utilize strategies to reflect on their growth and development. ... They develop a mindset that favours life-long learning.”

Lálém ye mestíyexw: Indigenization at UFV

Link: <https://www.ufv.ca/indigenous/indigenization/strategic-plan/>

- Honour Indigenous knowledge at all touchpoints of learning (Engaging Learners / Yoystexw ye totilthet).
- Dismantle settler colonialism by centering Stó:lō ways of knowing and being in the University (Transforming Lives / Ayeqet kw’e shxwaylexws).
- Commit to achieving the Calls to Action from the Truth and Reconciliation Commission Lálém ye mestíyexw (“House of the Peoples”) and the United Nations Declaration on the Rights of Indigenous Peoples (Building Community / Thayt kw’e st’elt’elawtexw).

Strategic Research Plan 2023-2028

Link: <https://www.ufv.ca/research/research-office/policies-and-plans/>

- Integrate research and teaching through ... supporting the development and delivery of inquiry-based curricula.

- Increase support for faculty members’ research and scholarly activities by enhancing information and technological resources essential to research and scholarly endeavours ... [and] supporting the dissemination and publication of the results of faculty research.
- Strategic research themes: agriculture and environmental resilience; diversity, reconciliation and justice; human health and social development; innovation, technology and modelling; scholarship of teaching and learning.

Structures and Resources

Oakleaf (2013) writes that “Library assessments that do not lead to decisions, actions, and communications with stakeholders are not worth doing” (p. 127). Assessment, then, becomes a collective activity shared among library administration, librarians, technicians, and other staff – one that underpins not only our daily work but any work we undertake to make changes or improvements to the library’s collections, services, spaces or operations.

This assessment plan is intended to be a living document that guides and prompts assessment activities throughout the library. The plan guides the work of the library’s assessment team¹, which provides overall direction and shapes assessment practices in the library.

The work of the assessment team includes, but is not limited to:

- collaborating and liaising with other library units and university departments (as necessary) to recommend protocols, establish methodologies, gather and analyze data, and communicate the results to stakeholders;
- creating and managing instruments and systems for collecting and storing quantitative and qualitative data;
- creating dashboards and other tools to help make library data accessible to library employees and others;
- recommending and overseeing the technologies related to collecting library data;
- making recommendations on modifying and enhancing use of underutilized services;
- updating the assessment plan at least every 3 years to align with library missions, goals, and aspirations; and
- overseeing and advising working groups charged with small-scale assessment projects related to user experience and utilizing physical and online library spaces.

¹ Ideally, the team consists of the Assessment Librarian and a library technician, who are responsible for carrying out ongoing assessment activities, with support and guidance from other leaders within the library, including collections, access services, reference, instruction, and technical services.

Data Policies

The UFV Library will take all possible measures to ensure the data gathered, stored, accessed, and reported by the library does not violate the rights and privacy of our users and employees. The UFV Library will publicly disclose what data is collected and how it is used on the library's website.

The UFV Library will comply with UFV's [research ethics](#) policies and practices. The Assessment Librarian is also able to provide advice on library research best practices, including recruitment, informed consent, and data privacy, confidentiality, and anonymization.

Goals and Outcomes

Some data and statistics are routinely collected in the course of library management, or to fulfill external reporting requirements (e.g., COPPUL and CPSLD annual statistics). Many of the library's systems automatically collect large amounts of data (e.g., the number of times books have circulated, gate count, e-resource usage data, cataloging statistics). In other cases, counts are recorded manually by library employees (e.g., reference and instruction statistics). These data sources can be used to generate routine or ad hoc administrative reports as needed and are valuable for tracking staff effort and managing day-to-day and seasonal operations. These many types of data sources and routine reports are not detailed in this plan, because they are not in and of themselves assessments.

Our overarching questions could be framed as:

Does our community of users (primarily students and faculty) see the library as a valuable resource to utilize during their educational journey/employment at UFV? Why or why not?

Specific assessment goals encompass these key areas:

- Collections – evaluating the library's collection in support of the University community's teaching and learning goals, information needs, and return on investment;
- Services – evaluating the library's services for the highest value and impact to our researchers and learners;
- Spaces – assessing the library's physical and digital spaces for ways to support evolving learning and research behaviours; and
- Operations – evaluating the library's resources, staffing, and workflows to support the overall goals of the library and the university.

Collections

Question(s)	Strategic Links	Data Sources	Timeline
<p>Do our collections meet the needs of our students and faculty (research, teaching)?</p> <p>Are we allocating our budget appropriately to serve all our users?</p> <p>Does our collections policy serve the needs of our students and faculty?</p>	<p>Empowering users</p> <p>Positioning the library</p>	<p>Collections survey</p> <p>Focus groups with faculty, students</p> <p>Turnaways, ILL requests</p>	<p>Every 3 years</p>
<p>How much value do we bring to individual users from our print & electronic collections?</p> <p>What are the cost savings to our users by having access to our library's collections (i.e., return on investment)?</p>	<p>Empowering users</p> <p>Positioning the library</p>	<p>COUNTER statistics plus average cost for journal articles, e-books, streaming videos, and other publications</p>	<p>Annually, at end of fiscal year</p>
<p>Are we getting good value from our Big Deals (journal packages)?</p>	<p>Transforming lives</p>	<p>Faculty survey on journal use</p> <p>Duplicate titles analysis</p> <p>Usage data</p>	<p>Every 5 years</p>

Question(s)	Strategic Links	Data Sources	Timeline
<p>What is the value of e-books and audiobooks to our users?</p> <ul style="list-style-type: none"> • Is our purchasing priority for e-books a correct assumption? • Do we need to buy multiple versions of the same title? • Can we buy expensive e-books as a replacement for course textbooks (e.g., spend over \$1000 per e-book)? • Will adopting more e-book acquisitions models increase use of our collections? 	<p>Empowering users Positioning the library</p>	<p>COUNTER statistics of e-books, including historical usage data and cost per use data</p> <p>Budget data (e.g., comparing % for print vs e-books)</p> <p>Focus groups with faculty, students</p>	<p>Annually, at end of fiscal year</p>
<p>What is the value of our outdated formats (DVDs, VHS, films) to our users?</p> <ul style="list-style-type: none"> • Is our purchasing priority for streaming a correct assumption? • Do we need to buy a physical format just in case we lose access to the streaming format? • Should we create our own platform to hold streaming content? 	<p>Empowering users Positioning the library</p>	<p>COUNTER statistics of media, including historical usage data and cost per use data</p> <p>Focus groups with faculty, students</p>	<p>Every 2 years</p>
<p>Does use of/engagement with the library's collections have an impact on student success (e.g., retention, GPA)?</p>	<p>Empowering users Engaging learner Positioning the library</p>	<p>OpenAthens authentication data</p> <p>Student success data</p>	<p>Annually, in spring semester</p>
<p>Are our collections current? Are we maintaining our collections appropriately?</p>	<p>Positioning the library</p>	<p>Age, use of collections by subject area</p>	<p>Annually</p>

Question(s)	Strategic Links	Data Sources	Timeline
<p>How are OER being used at UFV?</p> <p>How many OER have been adopted, adapted, and/or created by UFV faculty?</p>	<p>Building Community</p> <p>Catalyzing Change</p> <p>Empowering users</p> <p>Engaging Learners</p> <p>Positioning the Library</p> <p>Transforming Lives</p>	<p>Textbook data analysis</p> <p>Course outline analysis</p> <p>Focus groups</p> <p>Surveys</p>	<p>Annually</p> <p>Every 3 years</p>
<p>Are student papers (theses and major papers) being accessed, read, or downloaded in HarvestIR?</p> <p>Are efforts to promote the papers resulting in increased exposure and access?</p> <p>Can changes within HarvestIR make them more accessible?</p>	<p>Building Community</p> <p>Engaging learners</p> <p>Transforming lives</p>	<p>Usage data from HarvestIR / Arca</p> <p>Search data from Sirsi</p> <p>Focus groups</p>	<p>Annually for 3 years</p>
<p>What is the value of our print periodical collection to our users?</p> <p>How can we connect/promote the print periodicals to our users?</p>	<p>Empowering users</p> <p>Positioning the library</p>	<p>Usage statistics</p> <p>Surveys</p>	<p>Annually, at end of fiscal year</p>
<p>Are our displays successful at promoting our print collections?</p>	<p>Catalyzing Change</p> <p>Empowering users</p> <p>Engaging Learners</p> <p>Positioning the Library</p> <p>Transforming Lives</p>	<p>Sirsi circulation data</p> <p>Observation?</p>	<p>Annually</p>

Services

Question(s)	Strategic Links	Data Sources	Timeline
<p>Are students, faculty, and other users satisfied with various library services and resources?</p> <p>Which services and resources are most important to them?</p> <p>Which services and resources do they use the most?</p>	<p>Empowering Users</p> <p>Engaging Learners</p> <p>Transforming Lives</p>	<p>User surveys (potentially using MISO* or LibQual Survey)</p> <p>Focus groups with faculty and students</p> <p>Data from LibAnswers, LibGuides, LibInsight</p>	<p>Every 3 years</p>
<p>Are our events increasing student/community engagement with the library?</p>	<p>Empowering Users</p> <p>Engaging Learners</p> <p>Transforming Lives</p>	<p>Post-event surveys</p>	<p>After every event</p>
		<p>Focus groups with faculty, community and students</p>	<p>Annually</p>
<p>How accessible is the library and our services?</p> <p>Do we meet your accessibility needs in a friendly, timely, (whatever) manner?</p>	<p>Catalyzing change</p> <p>Empowering users</p> <p>Positioning the library</p>	<p>Focus groups with faculty, students</p>	<p>Annually</p>
		<p>Services survey</p>	<p>Every 3 years</p>

Question(s)	Strategic Links	Data Sources	Timeline
<p>Do faculty require students to interact with/use library resources?</p> <ul style="list-style-type: none"> • What steps do faculty take to have their students interact/use library resources? • Do they assume students use the resources or do they ask for proof? • How can the liaison librarians support faculty in creating a better assignment for students? 	<p>Building Community</p> <p>Empowering users</p> <p>Engaging Learners</p> <p>Positioning the library</p> <p>Transforming Lives</p>	<p>Focus groups</p> <p>Data that can be tied specifically to student use:</p> <ul style="list-style-type: none"> • OpenAthens authentications • Sirsi circulation data • Reference statistics 	<p>Every 3 or 4 years</p>
<p>What types of relationships do students want with UFV Library?</p>	<p>Building Community</p> <p>Empowering users</p> <p>Positioning the library</p> <p>Transforming Lives</p>	<p>Focus groups</p> <p>Surveys</p>	<p>Every 3 or 4 years</p>
<p>Do faculty feel connected to their liaison representative?</p> <p>How would they like to be supported by the liaison?</p>	<p>Building Community</p> <p>Positioning the library</p>	<p>Focus groups</p> <p>Surveys</p>	<p>Every 5 years</p>
<p>Do students think the library instruction sessions enhance their learning/grades?</p>	<p>Empowering Users</p> <p>Engaging Learners</p>	<p>Surveys</p>	<p>Annually to graduating students</p>

Question(s)	Strategic Links	Data Sources	Timeline
<p>Do library instruction sessions improve UFV students' information/digital literacy skills?</p> <p>What is the impact of Library Instruction on our first year learners vs other undergraduate students?</p>	<p>Positioning Library</p> <p>Transforming Lives</p>	<p>Focus groups</p>	<p>Annually</p>
<p>Are students, faculty, and other users satisfied with reference services?</p>	<p>Empowering Users</p> <p>Engaging Learners</p> <p>Transforming Lives</p>	<p>User surveys (potentially using MISO or LibQual Survey)</p> <p>Focus groups with faculty and students</p> <p>Data from LibAnswers, LibGuides, LibInsight</p>	<p>Every 3 years</p>
<p>Are students, faculty, and other users research needs being met effectively and efficiently?</p>	<p>Empowering Users</p> <p>Engaging Learners</p> <p>Transforming Lives</p>	<p>User surveys (potentially using MISO* or LibQual Survey)</p> <p>Focus groups</p> <p>Data from LibAnswers, LibGuides, LibInsight</p>	<p>Every 3 years</p>
<p>Is the Interlibrary Loan Department able to support the research projects of the UFV community?</p> <p>Is the UFV community aware of the services available thru interlibrary loan/document delivery?</p>	<p>Empowering Users</p> <p>Positioning the Library</p>	<p>Surveys</p>	<p>Every 2 or 3 years</p>

Question(s)	Strategic Links	Data Sources	Timeline
<p>Do students find our LibGuides valuable?</p> <ul style="list-style-type: none"> • How much are guides used overall? • Which types of guides are favoured? 	<p>Empowering users</p> <p>Engaging learners</p> <p>Transforming lives</p>	<p>Google Analytics</p> <p>LibGuides statistics</p> <p>Surveys embedded in LibGuides</p>	Ongoing
<p>Do reserve policies meet the needs of faculty and students?</p> <p>What are students looking for on reserve (i.e., textbooks)?</p> <p>Are there services we could be offering to help with cost/availability of textbooks?</p> <p>What do faculty want on reserve?</p> <p>Where should funding for reserves come from, departments or library?</p>	<p>Empowering users</p> <p>Positioning the library</p>	<p>Usage statistics</p> <p>Surveys</p>	Every 2 or 3 years

Spaces

Question(s)	Strategic Links	Data Sources	Timeline
<p>Are library spaces meeting the needs of our users?</p> <p>What are the preferred spaces?</p> <p>Is there satisfactory technology available (charging ports/outlets, lighting)?</p>	<p>Engaging learners</p> <p>Positioning the library</p>	<p>Space usage statistics</p> <p>Focus groups</p> <p>Observational data</p>	<p>Annually, in winter semester for next 3 years</p>
		<p>Surveys</p>	<p>Every 3 years</p>

Question(s)	Strategic Links	Data Sources	Timeline
Do library hours adequately meet the needs of the library patrons?	Empowering Users Positioning the library Transforming lives	User surveys Gate counts Space Usage Stats Observational data	Every 5 years

Operations

Question(s)	Strategic Links	Data Sources	Timeline
Is our staffing adequate to provide effective services to students, faculty and others? Are we providing library staff with opportunities to develop their gifts?	Catalyzing change Transforming lives	Workload surveys Benchmarks (CPSLD stats)	Every 2 years
		Individual and library goals	Annually
		Focus groups with faculty, students Surveys	Every 3 years
Are library marketing practices effective at informing and engaging users with the library? What types of content would users like to see and via what platforms?	Building Community Catalyzing Change Empowering users Engaging Learners Positioning the Library	Social media stats Google analytics (campaigns)	Annually
		Surveys Focus groups	Every 3 years
Are hours of reference service aligned with user needs and making the best use of staff time?	Empowering Users Engaging Learners Transforming Lives	Focus groups Gate count data Data from LibAnswers, LibGuides, LibInsight	Every 3 years

Question(s)	Strategic Links	Data Sources	Timeline
Is our website effective? Is the wording relevant? Is the layout effective?	Empowering Users Engaging Learners Transforming Lives	User surveys Focus groups Usability studies Data from Google Analytics	Every 4 years

Timelines for Assessment

Assessment provides the library with the opportunity to monitor and improve services, manage library collections, identify trends in users' needs, make improvements to staffing, and promote library collections and services in furtherance of the library's mission to support the educational needs of the University community.

Other services, resources or practices may be prioritized for assessment in a given year. Rather than being conducted on a recurring schedule, these assessments often occur in the context of special projects or circumstances. They frequently require extended, intensive efforts of multiple library staff. Examples of these assessment activities include:

- Post-event surveys
- Accessibility focus groups
- Space use studies²
- Analysis of collections use and cost, return on investment (ROI)

The following calendar reflects the anticipated schedule of surveys and studies for the next 5 years, starting with a survey of graduating students.

	Fall	Winter	Spring
2025		Space Use Study	Student Success Analysis Collections Analysis

² In Spring 2024 we conducted a survey where we asked several questions about the library spaces. We propose a 3-year space use study, conducted in winter semester in 2025, 2026, and 2027, to assess the impact that the new residence hall and the newly renovated cafeteria space have on library spaces.

	Fall	Winter	Spring
2026	Collections Survey + Focus groups (students, faculty)	Graduating Students Survey (February) Space Use Study	OER Analysis Collections Analysis
2027	Services Survey + Focus groups (students)	Graduating Students Survey (February) Space Use Study	Web Site Usability Studies Collections Analysis
2028	Spaces Survey	Graduating Students Survey (February)	Student Success Analysis Collections Analysis
2029	Collections Survey + Focus Groups	Graduating Students Survey (February)	OER Analysis Collections Analysis

References

Oakleaf, M. (2013). Building the assessment librarian guildhall: Criteria and skills for quality assessment. *Journal of Academic Librarianship*, 39(2), 126-128. <https://doi.org/10.1016/j.acalib.2013.02.004>