

# ULS Strategic Assessment Unit plan for FY2017-FY19

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## Objectives

The ULS Strategic Assessment Unit’s main objective is to coordinate data collection and analysis to support both strategic and operational priorities of the ULS as well as help ULS demonstrate value of its services to all its stakeholders.

The objectives of the Unit include:

1. Implementation and maintenance of a robust library data management infrastructure, which will allow for capture, storage, analysis and reporting of ULS statistics.
2. Ongoing support of evaluation efforts relating to implementation of the annual planning process.
3. Development and implementation of new approaches to demonstrate value of ULS to the University, profession, and wider community.
4. Ongoing support of routine and ad hoc data and assessment requests.
5. Support of activities relating to Hillman renovation program (over the 5-year span of the project)

## Stakeholder needs

<i>Internal stakeholders</i>	<i>External stakeholders</i>
<p><u>ULS Senior Management needs to:</u></p> <ul style="list-style-type: none"> <li>• demonstrate value/impact of ULS and its services</li> <li>• promote ULS and its services</li> <li>• fundraise</li> <li>• budget</li> <li>• understand ranking and peer comparisons</li> <li>• report to University and external bodies</li> <li>• understand staff culture and satisfaction</li> </ul> <p><u>ULS service managers and committee chairs need:</u></p> <ul style="list-style-type: none"> <li>• evaluation of services: user needs, awareness, satisfaction and usage, measured and perceived value and impact</li> <li>• evidence-based prioritization and development of new services</li> <li>• to track progress towards set goals</li> <li>• to carry out staff performance assessment</li> <li>• to develop ability to plan and carry out assessment activities</li> </ul>	<p><u>University administration (faculties and central) need:</u></p> <ul style="list-style-type: none"> <li>• periodic and ad hoc reports (rankings, trends, impact, strategic directions)</li> <li>• support for grant proposals, accreditations, etc.</li> </ul> <p><u>Professional bodies and peer institutions need:</u></p> <ul style="list-style-type: none"> <li>• libraries to share the best practice</li> <li>• periodic and ad hoc reports on inputs, outputs and outcomes</li> </ul> <p><u>Library users need to:</u></p> <ul style="list-style-type: none"> <li>• see service changes resulting from user feedback</li> <li>• understand value/impact of ULS and its services</li> <li>• understand ranking and peer comparisons</li> </ul>

## Activities

**Objective 1:** *Implementation and maintenance of a robust library data management infrastructure, which will allow for capture, storage and reporting of ULS statistics.*

- 1) Complete implementation and encourage ongoing usage of LibInsight, library data management system brought in for trial in Summer 2015 and licensed in Spring 2016.
  - i) Develop data sets, reports and dashboards for capture of reference transactions, instruction and outreach sessions, COUNTER usage statistics (for journals, books and databases), circulation statistics, ILL, room bookings, ULS website and Summon usage, replacement of paper-based forms used in Archives and Special Collections, new forms for capturing other data points (e.g. items used in exhibits, etc.) and capture of gate and head counts.
  - ii) Empower ULS colleagues to take more active role in accessing and analyzing LibInsight data
- 2) Ensure access to new data points from new Hillman gates (to be implemented as part of the Hillman renovation project)
- 3) Ongoing update of Assessment Unit website (on ULS website) to showcase its activities and ULS statistics and to serve/link to ULS statistics dashboard(s) (Tableau and LibInsight)
- 4) Maintain and/or develop access to new data sources including student demographic data from People Soft, patron-level circulation and e-resource usage statistics (e.g. from EzyProxy logs, Voyager circulation records), use of ULS computers (Pharos), ILL, etc.

**Objective 2:** *Ongoing support of evaluation efforts relating to implementation of the annual planning process.*

- 1) Provide support to the PBC in its effort to develop robust and measurable strategic options for prioritization
- 2) Provide support to strategic actions owners with further development of assessment components of their projects
- 3) Provide support to owners of strategic actions which use data collection and analysis as part of the project design and implementation

**Objective 3:** *Development and implementation of new approaches to demonstrate value of ULS to the University, profession and wider community.*

- 1) Implementation of new assessment tools and data presentation to improve processes and analytical capabilities, including:
  - i) master use of tools for collection, analysis and presentation of data: Qualtrics; Tableau, NVivo

- ii) continue use of infographics and accelerate use of interactive dashboards for public and internal facing presentations of data
- 2) Continuation of a program measuring student learning outcomes resulting from
    - i) library instruction, use of library resources (physical circulation, e-journal access, turnstiles), space redesign and development of new services
    - ii) develop relationships with other university units to support the above
    - iii) take advantage of recently acquired access to PeopleSoft data for new analyses to measure library impact on student outcomes
  - 3) Develop a program of assessment addressing the impact of library services on the research process and outcomes of Pitt research community

***Objective 4: Ongoing support of routine and ad hoc data and analysis requests***

- 1) Manage ULS, HSLs, and Law annual data reporting to ARL, IPEDS, Institutional Research Office, and others, as required.
- 2) Manage user data collection: development of survey instruments, delivery, analysis and dissemination of findings (periodic surveys, focus groups, interviews, etc.)
- 3) Support all other data collection/analyses requested from ULS in support of the organizational mission

***Objective 5: Support of activities relating to Hillman renovation program (over the 5-year span of the project)***

- 1) Participate in developing principles for moving of collections to enable Hillman building works as well as provide data modelling for different Hillman programming scenarios
- 2) Assist in development of public-facing visualizations related to the communication of the project progress (e.g. timelines, interactive floor plans, etc.)
- 3) Share findings and data from recent studies of space use in Hillman and develop and carry out new studies, as required
- 4) Actively support efforts of brightspot consultants