Assessing the Impact of the Library in the Research Ecosystem

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This Presentation

- Background: The ARL perspective
- Visioning Process & Vision: How we got to the recommendations of the Library Impact Framework
- Defining the Library Impact Framework: Logic model
- Overview of the Framework and Efforts to Date
- ARL Stats and Next Steps
Background: The ARL Perspective
ARL Strategic Thinking & Design Initiative (2013-2015)

• Reinvent the research library model within the evolving contexts and issues of the 21\textsuperscript{st} century

• Assume a leadership role in the larger university system

• Shift from knowledge service providers to collaborative partners
ARL Assessment Visioning Task Force

- Jennifer Paustenbaugh, Chair, Brigham Young University
- Sue Baughman, Association of Research Libraries
- Colleen Cook, McGill University
- William Garrity, University of California, Davis
- Steve Hiller, University of Washington
- Arnold Hirshon, Case Western Reserve University
- Brian Keith, University of Florida
- Zsuzsa Koltay, Cornell University
- Steven Mandeville-Gamble, University of California, Riverside
- Brian Nosek, Center for Open Science
- Alice Pitt, York University
- Peter Schiffer, University of Illinois at Urbana-Champaign
- Steve Smith, University of Tennessee, Knoxville
- Elaine Westbrooks, University of North Carolina at Chapel Hill
- Stanley Wilder, Louisiana State University
- Amy Yeager, Association of Research Libraries
- Megan Hurst & Christine Madsen, Athenaeum21
Charge of the Visioning Task Force

• “The task force is charged to consider all current and potential ARL assessment-related services, including the goals, outcomes, deliverables, staff, and other resources related to the existing metrics and tools, and to the surveys in the StatsQUAL suite.

• A critical component of the recommendations will be consideration of the types of issues ARL libraries will need to address in their measurement and evaluation program in the context of contemporary movements in higher education.”
Visioning Process & Vision:
How we got to the recommendations of the Library Impact Framework
Visioning: Research Inputs

- Interviews (82)
- Site Visits (4)
- Surveys (2)
  - 1 general survey - 211 responses (9% response rate)
  - 1 member poll at May 2017 Association Meeting - 78 responses
- Usage Data Review
- Programs, Services & Tools Inventory

- Stakeholder Identification & Prioritization
- Journey Mapping Workshop
- ARL Staff Time Analysis
- Prioritization of Recommendations
- Environmental Scan for Inspiration from library world and beyond
- Roadmapping Workshop
- Preliminary Roadmap and Timelines
Visioning Research & Workshop Outputs

• Outcomes of the VTF Persona & Journey Mapping Workshop
• Survey Results Summary
• Spring Member Meeting Poll Results
• LibQUAL & ClimateQUAL Use by ARL Members
• Gap Analysis
• Inspiration from Others
• Preliminary Assessment Program Roadmap
• Essential Criteria for Assessment Program Director
Vision for ARL Assessment Program

• Research libraries need to define the values by which we want to be measured, rather than trying to manifest values out of the data that we have.

• Members want ARL to “set the context for understanding and communicating the stories of the research library to external stakeholders and provide the tools for members to tell this story locally.”
What’s Different or New Here?

● Expands focus of program from library practitioners to include library directors’ needs in assessing and communicating

● Positions the library as a partner/influencer in the changing research and higher education landscapes

● Provides a shared “big picture” of research and higher education ecosystems while accommodating the multiplicity of members’ local needs (a buffet).
What’s Different or New Here?

- Increases members’ local return on investment in ARL, leveraging their own staff expertise and knowledge for both local and collective ARL members’ benefit

- Preserves and builds upon ARL’s historical strengths in longitudinal data collection, statistical analysis, and research methods

- Provides a draft roadmap for immediate action/implementation, and for a future ARL Director of Research & Analytics, showing priorities, timelines, and dependencies.
What’s Different or New Here?

- Brings library assessment practitioners onto the ARL Assessment Program Committee, and puts practitioners in dialogue and collaboration with library directors.

- Sets up an ongoing iterative model for prioritizing and piloting library assessment research questions within a broader institutional research and higher education context.
Library Impact Framework

• A shared “big picture” of the larger research and higher education ecosystems in which we all operate.

• Should help organize, prioritize and focus on the our common issues and collective solutions.

• Connects the vision directly with the data.
Library Assessment Ecosystem (before)

Focus on process and service quality improvement.

Evolution of maturity towards continuous assessment & improvement.
Library Assessment Ecosystem (today)
Defining the Library Impact Framework: Logic Model
Logic Model

“a systematic and visual way to present and share your understanding of the relationships among the resources you have to operate your program, the activities you plan to do, and the changes or results you hope to achieve”

W.K. Kellogg Foundation, 2000
CHANGES OVER TIME

Resource Inputs
- Budget
- Research and grant funding
- Staff skills & expertise

Activities
- Services
- Research and Development
- Collaboration
- Innovation

Outputs
- New services
- Publications
- New processes and methods
- New outreach activities

Outcomes
- Increased use of services
- More research/grant income
- Increased awareness of library services
- Greater student success
- Increased faculty outputs

Impacts
- Cultural
- Societal
- Economic
- Health
- Political
- Technological
Current ARL Stats & Assessment Focus
CHANGES OVER TIME

Resource Inputs ➔ Activities ➔ Outputs ➔ Outcomes ➔ Impacts

What Members Want to Know
CHANGES OVER TIME

Resource Inputs → Activities → Outputs → Outcomes → Impacts

Current Assessment

ARL Stats & Member Focus

What Members Want to Know

Framework
Informed by your desired impacts, a framework should help you understand and design the relationship between your activities, outputs and outcomes.
Framework

• A shared “big picture” of the larger research and higher education ecosystems in which we all operate.

• Should help organize, prioritize and focus on the our common issues and collective solutions.

• Connects the vision directly with the data.
Overview of the Framework and Efforts to Date
The Framework

“set the context for understanding and communicating the stories of the research library to external stakeholders and provide the tools for members to tell this story locally.”
Filling out the Framework & Identifying New ARL Stats

- Institutional /Campus Goals
- Questions/Desired Outcomes
- What methods can you use to answer this question? (Quant or Qual)
- Available data sources?
- Is this data of interest to everyone? Can it be benchmarked?
- New draft of ARL Stats
Top 4 Areas of Concern from 80+ Interviews

- Physical Space
- Research & Scholarly Lifecycle
- Collections
- Teaching, Learning & Student Success
## Preliminary Draft Framework

- Covering 4 focus areas
- Based on Visioning Task Force research
- Building on previous project with UC Davis
January 2018 Workshop: Elaborating the Framework

Workshop with ARL Assessment Committee Members elaborated the 4 focus areas.

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<td>Outcomes-Based Research Questions</td>
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<td>Benchmarkable Across ARL Members?</td>
<td>Revisit ARL Stats (current)?</td>
<td>ARL Stats (future)?</td>
<td>ARL Salary Stats (current)?</td>
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**Notes:**
- *The ARL Stats listed below are preceded by numbers e.g. "*8.2.2 Percentage of Library Users*" or ZBI/2013/2014 standards.

**Remarks:**
- "*Can you provide an example of a time when the Library didn't have what you needed?* Can you provide an example of when the Library had just what you needed? Or where you felt the Library when absent and beyond what you expected?"
Continual Process

Library Impact FRAMEWORK

Library Impact PILOT COHORTS

We are here

Refine/Update Framework

Repeat Process

OUTPUTS

Research Projects
Case Studies
Tools (e.g. Checklists)

Pilot Candidate ARL Stats

Candidate ARL Stats

Revised ARL Stats
Institutional or Campus Goals
(Examples from the Research & Scholarly Lifecycle Group)

- Invest in technologies and research spaces to allow world-class faculty research science to flourish
- Renew our emphasis on fundamental inquiry and discovery across campus, advancing and facilitating interdisciplinary research
- Foster and encourage diversity, including diversity of thought
- Inform work on problems at local, national and global levels, extending collaborative efforts, constructive criticism, and community input
- Increase student graduation and retention rates
- Develop a global footprint, increasing our international rankings, international research collaborations, and research productivity
Library Assessment Research Questions

(Examples from the Research & Scholarly Lifecycle Group)

● How much funding do libraries receive to advance interdisciplinary research (training, DMP services, lit reviews etc., co-authoring; percentage of libraries staff time to support fac research grants etc.)?

● To what extent are libraries viewed a research partners versus research support?

● How much library staff time is dedicated to supporting faculty research grants?

● How common are various research support services that libraries may provide (data management, grant application support, preservation, suggestions for where to publish?)

● How does the library support the use and exploration of new technologies by researchers across campus?

● To what extent are libraries the home of scholarly publishing at their academic institutions?

● How many libraries are actively contributing to OAI?

● What percent of faculty have an ORCID?
library leaders and assessment professionals collaborate closely on the most pressing library impact questions

1. Identify Institutional Goal/Campus Goal/Impact Questions
2. Define Outcomes-Based Research Question/s
3. Identify best research methods to answer question/s
4. What data do we need? What data do we have? What data can we get?
5. Is the data needed benchmark-able? Should it be an ARL Stat?
6. Identification of new candidate ARL stats to be tested in ARL Proposed Stats Pilots

Library Impact Pilot Cohorts
ARL Stats and Next Steps
Data

• One of ARL’s most important assets.

• Should be made more accessible and more usable.

• ARL Stats need to:

  reflect the **meaning and relevance** of ARL member libraries to the research and higher education ecosystem.

  undertake a **radical shift away from output and input measures towards outcomes and impact**.

  Pilot cohorts will work together to **identify and test new metrics**; and **utilize existing data points** in new ways.
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<td>INITCIRC // TITLE // VOLS // EBOOKS //</td>
<td>B.2.1.3 Percentage of Stock Not Used</td>
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<td>How much of our collections are being used?</td>
<td>Print: Number of circulation/transactions/number of items in the collection</td>
<td>COUNTER / ARL Stats</td>
<td>FEDSEARCHES // RESEARCHER //</td>
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<td>What is the rate of usage of collections, relative to researcher population?</td>
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<td>How and when are our collections being used?</td>
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<td>COUNTER / ARL Stats</td>
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<td>How and when are our collections being used?</td>
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<td>Bring Breakthroughs to Society (Case Western Reserve Univ) // Contribute to Local/Regional/National Economic Development: How has the institution’s research contributed to</td>
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<td>B.2.1.4 Number of Content Units Downloaded per Capita</td>
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<td>How does the library support research outputs? // What have the institution’s researchers produced? How has the library been involved? What has the library contributed (or not contributed) to faculty/researcher productivity?</td>
<td>Publications by library staff</td>
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<td>How can we give researchers access to the most current, relevant research in the easiest, most efficient way?</td>
<td>B.1.2.2 Median Time of Document Retrieval from Closed Stacks; B.1.2.3 Speed of Interlibrary Lending</td>
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<td>Research &amp; Scholarly Lifecycle</td>
<td>Research Support: Tech Transfer</td>
<td># of patent searches with library support // # of patents granted to faculty with library support</td>
<td>COUNTER / ARL Stats</td>
<td>COUNTER / ARL Stats</td>
<td>B.2.1.2 Percentage of Rejected Accesses</td>
</tr>
<tr>
<td></td>
<td>Research Support: General</td>
<td>Research &amp; Scholarly Lifecycle</td>
<td>Research Support: General</td>
<td>How does the library contribute to the scholarly process?</td>
<td>Publications by library staff</td>
<td>Publications by library staff</td>
<td>B.2.1.2 Percentage of Rejected Accesses</td>
</tr>
<tr>
<td>Advance interdisciplinary initiatives in research and education that align our expertise with the world’s most pressing needs (Case Western Reserve Univ)</td>
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<td>B.2.1.2 Loans per Capita B.2.1.4 Number of Content Units Downloaded per Capita</td>
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<tr>
<td>Increase research productivity</td>
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<td>B.2.1.2 Percentage of Rejected Accesses</td>
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</table>

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### Filling out the Framework & Identifying New ARL Stats

<table>
<thead>
<tr>
<th>Institutional/Campus Goals</th>
<th>Questions/Desired Outcomes</th>
<th>What methods can you use to answer this question? (Quant or Qual)</th>
<th>Available data sources?</th>
<th>Is this data of interest to everyone? Can it be benchmarked</th>
</tr>
</thead>
</table>

**New draft of ARL Stats**
ARL Proposed Stats Pilots

1. Gather new candidate ARL stats identified during Library Impact Pilot Cohorts
2. Prioritize and test candidate stats with sub-sets of ARL membership
3. Evaluate cost/benefit of candidate stats
4. Test utility and usefulness of candidate stats
5. Recommend tested candidate stats for adoption
6. ARL Members ratify and adopt new stats
Continual Process

Years 1-2

Library Impact FRAMEWORK

Library Impact PILOT COHORTS

Repeat Process

Research Projects

Case Studies

Tools (e.g. Checklists)

Candidate ARL Stats

Pilot Candidate ARL Stats

Revised ARL Stats

Years 2-3

Refine/Update Framework
Questions / Comments?

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