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# Library Assessment & Decreasing Resources: Making Things Work

## Évaluation de la bibliothèque et diminution des ressources : faire fonctionner les choses

Laura Newton Miller 

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Résumé de l'article

Cet article examine comment l'évaluation a évolué au cours des dix dernières années à l'Université Carleton située à Ottawa, Ontario, Canada. En passant de 1,5 personnes dédiées à l'évaluation à une seule personne responsable de l'évaluation tout en étant également Chef des collections, il est devenu impératif d'intégrer l'évaluation dans le fonctionnement quotidien de la bibliothèque pour pallier le manque de temps dédié. En examinant le déploiement du sondage Insync, la dépendance aux rapports d'université externes et internes, l'évaluation des activités de planification stratégique ainsi que les changements liés aux pratiques de collecte de données, cet article révèle comment la Bibliothèque de Carleton a révisé ses services, ses collections et ses espaces en fonction des ressources disponibles. Les partenariats avec d'autres départements sur le campus et au sein de la bibliothèque sont clés.

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## Library Assessment & Decreasing Resources: Making Things Work

### Évaluation de la bibliothèque et diminution des ressources: faire fonctionner les choses

Laura Newton Miller  
Head of Collections & Assessment  
Carleton University  
[laura.newtonmiller@carleton.ca](mailto:laura.newtonmiller@carleton.ca)  
<https://orcid.org/0000-0002-2205-2149>

#### **Abstract / Résumé**

This paper reviews how assessment has evolved in the past ten years at Carleton University in Ottawa, Ontario, Canada. From having 1.5 people devoted to assessment to one person in charge of assessment while also being Head of Collections, it became imperative to integrate assessment into the day-to-day workings of the library to address the lack of dedicated time available. By examining the library's deployment of the Insync survey, reliance on external and internal university reports, assessment for strategic planning activities, and shifts in data collection practices, this paper will reveal how Carleton Library has reviewed the services, collection, and space given available resources. Partnering with other departments on campus and within the library is key.

Cet article examine comment l'évaluation a évolué au cours des dix dernières années à l'Université Carleton située à Ottawa, Ontario, Canada. En passant de 1,5 personnes dédiées à l'évaluation à une seule personne responsable de l'évaluation tout en étant également Chef des collections, il est devenu impératif d'intégrer l'évaluation dans le fonctionnement quotidien de la bibliothèque pour pallier le manque de temps dédié. En examinant le déploiement du sondage Insync, la dépendance aux rapports d'université externes et internes, l'évaluation des activités de planification stratégique ainsi que les changements liés aux pratiques de collecte de données, cet article révèle comment la Bibliothèque de Carleton a révisé ses services, ses collections et ses espaces en

fonction des ressources disponibles. Les partenariats avec d'autres départements sur le campus et au sein de la bibliothèque sont clés.

### ***Keywords / Mots-clés***

assessment, evaluation, academic libraries, strategic planning, data collection, surveys, collaboration, Insync; évaluation, bibliothèques universitaires, plan stratégique, collecte de données, sondages, collaboration, Insync

### ***Introduction***

MacOdrum Library is the only campus library of Carleton University, a comprehensive institution of nearly 30,000 students located in Ottawa, Ontario, Canada (Carleton University, n.d.). The library assesses the needs of students, faculty, and staff in several ways. In 2012, based on recommendations by a task group from the Association of Research Libraries (Self & Hiller, 2008), Carleton Library created a part-time position dedicated to library service assessment. At the same time, the library also created a full-time collections assessment position (Newton Miller et al., 2014). After the retirement of the person in the part-time position, the collection assessment position evolved to become the Assessment Coordinator role, encompassing the review of services, spaces, and collections. Circumstances changed in 2018: because of movement elsewhere in the library, the Assessment Coordinator became the Head of Collections and Assessment. Leading collection development is demanding in itself, so it became imperative to determine how assessment could be integrated into the day-to-day workings of the library when there is less time to devote to it. This paper will investigate how Carleton Library has reviewed the services, collection, and space in a time where assessment is important but the time to devote to it is lacking. It will describe the library's implementation of the Insync survey, the use of internal and external university reports, the assessment for strategic planning activities, and how data collection has changed over time. Partnering with other departments on campus and within the library is key. As library assessment can sometimes be an isolating experience, it is important to share knowledge when possible. This paper will help others who coordinate assessment to understand logistics and potential places to get support.

### ***Insync Survey***

Regularly scheduled surveys are often used in academic libraries to assess the needs of users (Newton Miller, 2018a). Having not issued a significant user survey in years, Carleton Library was in a unique position in choosing a survey instrument, as we did not have longitudinal data on which to rely. Offered by the Association of Research Libraries, LibQUAL is a web-based survey that assesses library services (Association of Research Libraries, n.d.). The last time Carleton conducted LibQUAL was in 2010.

In 2017, while researching user surveys for strategic planning, Insync came to the forefront as a tool used in Australian contexts. Insync is an Australian-based company that conducts library-based user surveys around the world (Insync Surveys Pty Ltd, 2023). They ask two things: what is important to the user and how well is the library

performing. The survey finds gaps between performance and importance; the bigger gaps are potential areas of focus for the library (Bedwell & Newton Miller, 2019).

After posting on various assessment listservs ([ARL-ASSESS@arl.org](mailto:ARL-ASSESS@arl.org), [ocul-assessment@lists.uwaterloo.ca](mailto:ocul-assessment@lists.uwaterloo.ca), [carlstat@listserv.uottawa.ca](mailto:carlstat@listserv.uottawa.ca)), it became clear that Insync was worth investigating more thoroughly for use in Canada. The university librarian at the time approved making Carleton Library the first in Canada to use the Insync survey. Carleton deployed the Insync survey twice: in 2018 and again in 2022.

Although we have great support from Carleton's Office of Institutional Research and Planning (OIRP), we are limited in both the frequency of surveys and the number of potential respondents. OIRP granted the library permission to survey 5000 students, half of the faculty, half of the contract instructors, and half of the staff (about 1600). OIRP randomly selected emails for each category, which we then used to contact people directly.

Conducting the survey required reaching out to information technology (IT) and legal group contacts, signing contracts, creating a communication plan, and other ancillary tasks. Tasks were spaced out over time based on Carleton's rules. It was helpful to have one person lead the project and reach out to others as needed. The work is significant, but one person with support and help from key people can handle it given sufficient time. From initiating OIRP survey approval in February to deployment of the survey in November, the time from start to launch was approximately 10 months. Carleton did not have a committee per se. In 2018, we had a small working group to go through the questions, ensure they reflected our needs, and change words not normally used in the Canadian context. The working group was composed of the University Librarian, the Web and User Experience Librarian, the Communications Coordinator, and the Head of Collections and Assessment. In 2022, only one person (the Head of Collections and Assessment) organized it and reached out to key people for help when needed.

Insync is a helpful tool for Carleton Library. The results are actionable, and it continues to be useful for benchmarking progress. Insync can tell us in what areas the library is performing well and what areas users find important. If there is a significant gap between performance and importance, the library can focus on those areas. The comments section also gives us insights on user needs.

### ***External to Carleton Reports***

Like many institutional research offices, Carleton University relies on national external surveys to help understand the needs of university students. Information gleaned from these surveys is a helpful source for understanding the needs of student library users without the library asking the students directly. With the help of Carleton's OIRP, Carleton, along with all other Ontario universities, participates in the National Survey of Student Engagement (NSSE) every three years. This survey examines participation and engagement of first-year and final-year students. The survey includes questions related to how the university needs to address academic support services outside of the

classroom (including the library), improving the library collection, and improving library services (OIRP, n.d.a).

The Canadian University Survey Consortium (CUSC) surveys students on a three-year rotation of first-year, middle-year, and graduating undergraduate students. For first-year students, it asks how students adjust to using services at the university, including the library, and compares this with how other university students of the same level have adjusted to the same service. Middle-year and graduating students are asked about their satisfaction with using the electronic and physical resources of the library (OIRP, n.d.b).

Carleton, along with all other Ontario universities, takes part in the Canadian Graduate and Professional Student Survey (CGPSS) every three years. Students rank their satisfaction on various aspects of the university, including library facilities (OIRP, n.d.c).

These external surveys allow for library assessment without the need for the library to directly question the students. From these three surveys, we get a sense of services (NSSE), space (CGPSS), and collections (CUSC) over a range of years.

### ***Internal to Carleton Reports: Satisfaction Surveys***

To improve services at Carleton University, the OIRP has two series of satisfaction surveys (one for employees, one for students) that they conduct on an annual basis. Carleton Library takes part in these surveys every two to three years. There are ten statements that have been tailored by the library and OIRP to ask about satisfaction with the library's collection, hours, staff help, facilities, website, availability and suitability of study space, and overall experience (OIRP, n.d.d). As data has been gathered over several years, it is very helpful for the library to see how various aspects of the library are used and appreciated by employees and students. OIRP also provides comments to the Head of Collections and Assessment should the library be mentioned in the general comment area of the survey, even when the library is not officially participating in the survey that year.

### ***Assessment for Strategic Planning***

Carleton Library successfully launched a strategic plan in 2021, despite the global COVID-19 pandemic (MacOdrum Library, 2021). The Head of Collections and Assessment had the benefit of learning what was useful and not about strategic planning (including user input) during a sabbatical in 2017 and used this information to lead and inform the process (Newton Miller, 2018a, 2018b).

### ***Understanding Trends and Thinking Strategically***

To help staff understand internal and external trends that might mitigate expectations in library staff feedback, the first step in the process was a presentation to all staff on Carleton University's strategic plan (Carleton University, 2020) by one of its co-chairs (Appel Kuzmarov, 2020). This was followed by a presentation on thinking strategically in

an academic setting by Lorie Kloda, Associate University Librarian for Planning & Community Relations at McGill University (Kloda, 2020).

### **User Feedback**

Carleton benefits from having a department on campus whose focus is service quality improvement. The Office of Quality Initiatives' (OQI) purpose is to advance "a culture of continuous improvement that supports Carleton's strategic goals" (OQI, n.d., para. 1). The Head of Collections and Assessment worked with the Head of OQI to develop questions for students and faculty. As Fall 2020 was an intense time—the first full term completely online during a pandemic—the library was sensitive to not over-survey students and faculty and instead used existing outlets to gather feedback. For any focus groups planned, there was an option to fill out a survey with the same questions so that information could be given at the user's convenience.

OQI led consultations and discussions with the Senate Library Committee. The Senate Library Committee is composed of members of different faculties across Carleton University who make recommendations on various aspects of the library (Carleton Senate, n.d.). Carleton Library also had sessions held with library faculty representatives who are appointed in each department of the university to give feedback to the library on whether its collection and services are meeting the needs of the department (MacOdrum Library, 2023a). Finally, the Head of Collections and Assessment visited a regular meeting of the Student Library Advisory Committee (MacOdrum Library, 2023b) to ask questions and have a discussion on student needs. Student leadership and student library workers chose to be surveyed instead of participating in a focus group.

### **Library Staff Feedback**

During the pandemic, there was a need to be as flexible as possible when it came to getting feedback. The Head of Collections and Assessment asked library staff how they wanted to provide feedback. OQI held two small online group sessions with an opportunity for asynchronous feedback. In these sessions, after a short introduction, the group was divided into small break-out rooms. Senior staff purposely did not attend and instead held their own retreat later in the process (led by OQI) to make decisions on how to focus the plan based on the feedback from library staff and users.

### ***Progression of Data Gathering***

Carleton Library uses several other assessment methods. For example, led by the Web and User Experience Librarian, there is a User Experience Committee in the library that examines the spaces and in-person services as well as the website. More information on various user experience work can be found in other readings (Cross & Gullikson, 2020; Gullikson, 2023; Gullikson & Meyer, 2016).

Assessment includes extensive data collection. In 2012 when a part-time assessment librarian and full-time collections assessment librarian started their roles, a lot of data

collection was “ticks” on paper and included different ways of measuring the same thing in different departments. It took time to get into a habit of making decisions based on evidence, particularly given that some was difficult to find (Newton Miller, 2013). Since 2017, Carleton Library has used LibInsight to significantly streamline collection of reference, consultation, and instruction statistics (Springshare, n.d.).

Carleton is also now a member of Collaborative Futures (Ontario Council of University Libraries [OCUL], n.d.). Carleton and other OCUL libraries have access to Alma Analytics via the Ex Libris platform, which offers “extensive insights for individual OCUL members as well as providing valuable information about operations and collections of all the participating members of the consortium” (OCUL, 2018, para. 5). Led by the Discovery Systems Librarian, there is more attention given to coordinating and collecting statistics on spending, circulation, and usage statistics of the general collection. Staff throughout the library learn from each other to gather and understand this relatively new system.

The Head of Collections and Assessment continues to gather general trends on service, collection, and space. Data is gathered on an annual basis to support library statements for academic program reviews (cyclical program reviews, major modifications, and new programs). Data is also coordinated and collected every year for the Canadian Association of Research Libraries (CARL), which manages “an annual library statistics program that collects, stores, and analyses data related to staffing, expenditures, collections, and the use of facilities in its member libraries” (CARL, n.d., para. 1). Collecting annual data helps the library to understand overall trends and benchmark against itself and others.

## ***Conclusion***

As budgets get tighter, there will certainly be a need for more focused time on assessment. Is the preference to once again have a person devoted to assessment? The answer is yes, given that assessment looks different than it did ten years ago. Although tools may be different, assessment still takes a long time to conduct, analyze, and communicate. But in the meantime, when thinking about assessment in a time crunch, the (slightly tweaked) saying “it takes a (focused) village” comes to mind. There are ways to mitigate competing demands on the time of a single assessment person. The Insync survey is a useful tool for the library, and with the help of some key people, is able to get timely information on what is important to the user and how the library is performing. The OIRP is instrumental in handling both external and internal surveys that provide information on library use and satisfaction. The OQI is exceptionally helpful in working with the Head of Collections and Assessment to lead qualitative assessment with discussions of both users and staff. By learning about results from complementary User Experience Committee work and taking advantage of data gathering platforms like LibInsight and Alma Analytics, we can better understand the user behaviours and needs of the library and in turn, better improve our services, space, and collections.

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