

## Assessment Charges and Mission Statements



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## STATISTICS, METRICS & SURVEY DEVELOPMENT COMMITTEE

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### about the Statistics Committee

#### **committee charge**

The Statistics, Metrics and Survey Development Committee is responsible for reviewing and assessing the responses of the University Libraries or units to all external statistical and qualitative surveys of our resources, services, personnel and expenditures as well as all surveys we distribute to users or supporters of the University Libraries.

Specific responsibilities include, but are not limited to:

1. Review and oversee the completion of statistical and qualitative surveys of University Libraries resources, services, personnel and expenditures for international, national, state and regional associations and government agencies (e.g.: ARL, AAHSL, US Dept. of Education, SUNY, etc.) using appropriate library systems (e.g., ALEPH) that generate relevant statistical data. Charge task forces, as needed, to oversee the administration of major survey projects, such as LibQual+
2. Periodically review, compare and analyze the data collected for the various statistical and qualitative surveys (included in #1 above) and provide summary reports for review and discussion by the UL Directors Council, University administrators, faculty, and library faculty. Develop specifications for managing and representing the data that has been collected for future use.
3. Assemble and provide any metrics needed to assist the Associate Vice President for University Libraries in making budget requests or developing strategic planning documents.
4. Complete an inventory of all current and past statistical and qualitative surveys (included in #1 above) for which the University Libraries or individual library units have provided data and develop a spreadsheet or database with detailed information about each survey (e.g.: sponsoring organization, subject scope, date(s) when data were last provided, where the data is stored, the person responsible for compiling the UB data, etc.). Make this spreadsheet or database accessible to all members of the UL Directors Council, and as appropriate to all UL staff, on a central libraries server. Coordinate the archiving of completed surveys.
5. Serve as a clearinghouse for the review and inventory of all new survey instruments aimed at users or potential supporters of the UB University Libraries or of individual library units.
6. Maintain liaison with the major organizations developing and maintaining statistical and qualitative survey data about research libraries and alert the Directors Council to the need for UB representation at important meetings concerning these surveys. Review the current library literature as well as relevant Websites and maintain a bibliography of relevant current articles and information resources about trends and issues surrounding research library statistics, metrics and surveys.

#### **conducting business**

##### **Membership**

Members of the committee are appointed by the Office of the Associate Vice President with approval by the University Libraries Directors Council for an initial term of three years.

- View the current membershin roster.

##### **Meetings**

The committee communicates primarily by e-mail and calls meetings only as needed.

Content provider: Gary Byrd  
Comments: [lib-staffweb@buffalo.edu](mailto:lib-staffweb@buffalo.edu)  
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## University of Connecticut Libraries

### USER Team

#### *Charge*

The USER Team is charged with coordinating library assessment and survey efforts for the University Libraries. The team designs, develops, conducts, and analyzes user surveys, coordinates the Libraries' participation in national user survey efforts, assists library staff in developing, conducting, and analyzing internal surveys, and archives survey data. The team develops reports for library staff that document survey findings for use in developing practical application of the data to the development of system-wide library policies, services, and collections. The team is also responsible for performing appropriate comparative analyses and for presenting data and statistical reports to the Libraries' Leadership Council (LC). Data and reports from USER team surveys are currently archived on the staff LAN and in the Dodd Research Center.

The team is also charged with coordinating collection of the Libraries' metrics and archiving this data for comparative and decision making purposes.

The team is expected to conduct or coordinate:

- Library user surveys every three years
- LibQUAL+ survey every three years or as appropriate
- Library assessment activities, such as Library metrics, annually by functional area
- Review and approval of all internally developed surveys
- Archiving of all data generated by internal and external surveys
- Organizational assessment every three years
- Other data gathering efforts as needed and determined appropriate by Leadership Council, Directors, and/or library staff

#### *Communication*

The USER Team will work in coordination with Leadership Council, library staff, and library functional areas. The team also develops annual goals and mid-year goal assessments, works with library staff to develop data gathering tools as requested, and for keeping staff apprised of survey efforts and reports via team participation in open meetings as appropriate, email communications, and the Libraries' home page.

Surveys on the Libraries Web page: <http://www.lib.uconn.edu/about/administration/surveys/>

Documents on Aletrona at: <http://aletrona.lib.uconn.edu/Teams/Documents.cfm?Dir=User>

Documents on the LAN (restricted to USER Team members) at: <\\staff\data\userteam>

E-mail distribution list: USER

#### *Team Composition/Selection*

The team is comprised of approximately four staff volunteers who are selected for specific skills, such as desk-top publishing, quantitative and qualitative data analysis, report writing, library collections, services, and strategic initiatives, and knowledge of university systems that provide information about campus populations. Members serve for three years in order to provide team continuity through a three year survey cycle (i.e., faculty/undergraduate student/graduate student surveys). Individuals who wish to remain on the team at the end of their term will be given first preference. Library staff should consult with their area head prior to submitting their name as a volunteer for membership.

*Leadership Council Liaison:*

The Director of Collections Services serves as the team's Leadership Council liaison.

The Leadership Council liaison will:

- meet each June with the newly populated team to review all aspects of the charge, or once a year in the case of a continuing team to ensure team members understand Leadership Council's intentions in charging the team
- be available to the team
- act as a communication link between the team and Leadership Council
- encourage the team to follow good project and team management skills
- ask questions or make suggestions if the team needs assistance
- be sufficiently knowledgeable of the work of the team so that the liaison is prepared to answer questions regarding the team's work
- advocate for the team when necessary or appropriate

*Term of Service*

The team will have 4-5 team members; two permanent and two/three rotating team members, who serve a minimum term of three years.

*Team Leadership*

The team selects a team leader from among the team members for a two year term.

While the work of the team is the responsibility of the team as a whole, the team leader is responsible for making sure the work of the team is done and for seeing that the following duties are carried out:

- meetings are scheduled
- meeting agendas are created and distributed
- meetings are run effectively and efficiently
- see that new team members joining an existing team are mentored
- meeting decisions and action items are documented and archived on Aletrona
- regular updates are sent to all staff to keep them informed of the team's work
- a mid-year report is submitted to Leadership Council (accomplishments to-date, obstacles encountered, and any requests for resources or revisions to goals set)
- an annual report is written
- annual goals are established and reviewed on a regular basis
- appropriate data are gathered and reported
- may also contribute to team members' annual performance evaluations.

*Reporting Relationship*

The team reports to Leadership Council.

*Meetings*

The team meets monthly or as appropriate to accomplish team goals and responsibilities.

*Minutes*

Minutes are recorded for each meeting on a rotating basis unless otherwise determined.

*Resources*

The team identifies human and fiscal resources needed for team training, software, or to conduct print and/or online surveys, or to perform quantitative and qualitative data analysis. Resources are included in the team's annual goals and presented for consideration to Leadership Council as part of annual and mid-year budget discussions.

**Charge for PSA Research and Assessment Unit**

*Approved by LMT on Feb. 7, 2007*

**Mission**

The Research and Assessment Unit (RAU) assembles and assesses data to report on Library performance and to provide evidence and context for Library priority-setting and decision making.

**Guiding Principles**

The Research and Assessment Unit

- Relies on functional experts in its work and trusts the wisdom and contribution of its colleagues;
- Strives to stay data-neutral in its research and analysis;
- Commits its resources to high-priority library projects, regardless of whether Public Services and Assessment (PSA) "owns" the project or not;
- Produces user-friendly products with trustworthy quality and timeliness;
- Recommends but does not enforce innovative changes for functional units

**Organization**

RAU resides within the Public Services and Assessment Division. It receives directional guidance from the Library Management Team (LMT) or through the Senior Associate University Librarians. RAU collaborates with other library and University units and groups, such as PSEC, Technical Service Senior Management Team, ITEC, CDExec, Library Communications, Administrative Operations, and the University Office of Institutional Research and Planning, to execute its assignments.

**Scope**

RAU's primary responsibilities fall in three categories:

1. It commissions data from library units. It organizes, analyzes, and reports on CUL performance to support reporting requirements, process improvement, and decision making.
  - It defines CUL's responses to data requested by ARL, ACRL, the National Center for Education, and other external entities.
  - It communicates the definitions to appropriate functional and organizational units within the library.
  - It assembles and interprets data reported by the units and submits them on behalf of CUL to requesting entities.
  - It produces the CUL Annual Statistics Report and redeploys collected data in support of CUL activities and public relations when called upon.

2. It maintains and improves a shared library data repository to support library-wide assessment.

- It partners with experts in other library units to build a central data repository that facilitates the storage, preservation, and use of library performance data in both qualitative and quantitative forms.
- It repurposes assessment data, such as survey results, queries, collection analysis, to support on-going self-examination of library operations, collections, and services.
- It strives to make data submission and use easier for both data producers and consumers.

3. It conducts high-priority research and assessment projects to support

- Evidence-based decision making
- Usability analysis
- Innovation

In this role, RAU focuses on the usefulness and impact of library services. It assists library project teams and functions both as an "intelligence unit" that conducts environmental scans in the project area, spots patterns and trends, and suggests innovative changes; and also as a "consultant" that recommends techniques for assessment, and participates in assessment instrument design, administration, analysis and reporting as requested by the project. RAU relies on the project team for its expert knowledge and works closely with designate resources from the project team when executing its assignments.

Relying on a network of CUL information providers, RAU coordinates and develops a knowledge base with processes, resources, and accessible measures. It drafts policies and procedures for approval by LMT and other bodies as appropriate. It produces/publishes results to advance evidence-based librarianship.

## Library Assessment Committee

### Charge:

Advise and assist the Assessment Librarian with assessment initiatives of all types.

- Assist in the development of new assessment endeavors.
- Review, analyze, and discuss data for projects, such as LibQUAL+, or in response to specific questions.
- Support reaccreditation process as needed.

### Membership:

Appointed by the Director of Libraries.

- Assessment Librarian.
- Up to four volunteers and/or nominees from all ranks of Library staff (at least one each from User Services and Collection Services).
- One Student Employee (if available).

**Chair:** Assessment Librarian.

**Term of Membership:** Two-year staggered terms, with staff rotating off each year on February 2. Members may be reappointed.

**Meetings:** Monthly or as needed, at the call of the Chair. Other members of the staff may be asked to join meetings when their specialized knowledge is needed.

**Information Sharing:** Maintain brief minutes of each meeting and publish them on LibWire. Provide additional information to the Director of Libraries as requested.

## Assessment Committee Members

[Mike Allard](#)

[Rachel Lewellen](#), Chair

[Stephen McGinty](#)

[Barbara Morgan](#)

[Emily Silverman](#)



**I. Team Purpose**

Improve library decision making through oversight of processes involved in gathering, managing, and reporting, and analyzing a holistic data set for USC Libraries. Assessment areas encompass all library activities according to four data types:

1. User Perceptions: assesses customer satisfaction, and the impact of the library university research and learning. User perception data is collected through surveys, focus groups, and informal interviews.
2. Usage: assesses the use of library resources such as circulating materials, online catalogs, databases, and web pages; and services such as reference, instruction, and library spaces. Usage data is collected through a combination of system reports and self reporting.
3. Performance: assesses individual, departmental, program, team, and center output; process efficiency and quality control; project and goal completion; etc. Performance data is collected through a combination of system reports, self reporting, and manager reporting.
4. Descriptive: assesses the size of collections, number of personnel, amounts of budgets and expenditures, number and scope of services, etc. Descriptive data is collected through a combination of system reports and self reporting.

**II. Products & Services**

<i>Services</i>	<i>Products</i>
Data Collection	Process maps, clearly defined data points, inputting instruction tutorials, online forms, cross-functional coordination
Data Management	Organization-wide management information system (Library Data Repository)
Data Reporting	Quarterly and annual reports, research survey participation, customized reports, presentations to groups
Assessment Training	Training for data gathering, data interpretation, decision making, turning data into action
Strategic Planning Support	External marketing research, USC needs assessments

**III. Team Clients**

- Library Leadership
- Library Team Leaders, Coordinators, Center Chairs, and Department Managers
- USC Provost’s Office
- USC School Deans, Academic Department Chairs
- USC Individual Researchers
- Non-USC Individual Researchers
- Non-USC Institutional Researchers (ARL, ACRL, etc.)



**IV. Key Results**

- Enhanced understanding of customer needs
- Informed managers, improved decision making
- Process quality control, enhanced efficiency, continuous improvement

**V. Guiding Principles**

- Data collected should provide feedback on the Library's mission and values
- Better data will improve performance

**VI. Time Frames**

- Monthly meetings
- Monthly data gathering
- Quarterly and annual reports
- Annual process review

**VII. Red Flag Issues**

- Data is not used (or not taken seriously)
- Data is overused (or taken too seriously)
- Data counted inaccurately
- Data not reported consistently
- Data not shared across the organization
- Data not stored centrally
- Managers untrained to interpret data
- Processes not documented
- Definitions not clear
- Collecting, reporting, and analysis roles not clear
- Self reporting where automation is possible
- Paper-based submission where electronic filing is possible

**VIII. Team Membership**

Access Services	Brian Harlan
Administration Services	Game Quan
Collection Development	Lynn Sipe
Collection Management	Masoud Farajpour
Information Development Management	Wayne Shoaf
Integrated Document Delivery	Gabe Vincent
Instruction Services	Melanie Remy
Reference Services	Judy Truelson

http://www.lib.utexas.edu/vprovost/assessment/index.html

The screenshot shows the University of Texas Libraries website. At the top, there is a navigation bar with links for "Libraries Home", "My Account", "Sitemap", and "Help". Below this is a search bar with the text "SEARCH: Library Web Site" and a "GO" button. A secondary navigation bar contains links for "About the Libraries", "Research Tools", "Library Services", "Resources for You", and "Ask a Librarian". The main content area has a breadcrumb trail: "Home > About the Libraries > Library Administration > Service Quality Assessment". On the left, there are two sections: "Service Quality Assessment" with links for "About", "Assessment Plan", "LibQUAL+", "Library Summits", "Improvement Projects", and "Quality Council"; and "Other Sites of Interest" with a link for "Library Administration". The main heading is "Service Quality Assessment and Improvement". The text below reads: "We want to build a climate of continuous improvement in all areas of library service. All staff - reference librarians, web designers, book shelvees, and catalogers - should understand that they are part of an organic whole, a system, and that it is not enough to be concerned with the success of one's own department. Staff of a successful organization are concerned with the success of the entire organization." This is followed by a quote from Fred Heath, Vice Provost of The University of Texas Libraries at Austin. At the bottom of the main content area, there is a "Contact Information" section for Damon Jaggars, Associate Director, with the email address [jaggars@austin.utexas.edu](mailto:jaggars@austin.utexas.edu).





## Management Information Services

### About MIS

Mission Statement  
Services Provided  
Staff Members

### Balanced Scorecard

### Surveys & Reports

### Statistics

### Web Usability Testing

### Links

## About MIS

### Mission Statement

Management Information Services (MIS) has responsibility for coordinating the collection and reporting of management information throughout the Library, and for advising Library administrators and managers on the uses of management information.

### The Department has the following functions:

1. To identify areas, functions, and tasks within the library where performance and service could be enhanced with management information data.
2. To develop expertise in various techniques of data collection and analysis, including focus groups and customer surveys, as well as analysis of computerized data files.
3. To educate the library staff in general, and library management in particular, as to the value of collecting and using management information.
4. To coordinate the statistical reports produced by the various library units, and to see that these reports correspond to the needs of the Library Administration and the appropriate national organizations.
5. To evaluate requests for management information and statistical reports, and to work with staff so that statistical reports and data analysis will be appropriate for the situation.
6. To assist the University Libraries Committee with their analyses and evaluations of library services and collections.
7. To provide the Library Administration with data for decision making by conducting and analyzing surveys and focus groups, etc.

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Management Information Services  
University of Virginia Library  
PO Box 400114  
Charlottesville, VA 22904-4114  
phone: 434.924.3240 • fax: 434.924.1431

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The Libraries - Your Information & Resources Gateway

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- ▶ Giving to the Libraries
- ▶ For Library Employees

**ASSESSMENT WORKING GROUP**

**ROLE:**

- To address issues related to assessing library collections, technologies and services
- To initiate assessments throughout the Libraries, chiefly based on client input
- To coordinate with and among working groups conducting assessments according to their charges
- To recommend to Library Council (LC) and/or other working groups actions based on results of assessments

The Assessment Working Group is intended to be an oversight body, with subgroups (task forces) on specific issues in assessment which include WG members and nonmembers who are interested in a particular aspect of assessment. The Group will also coordinate efforts of other working groups and act as a clearinghouse. Branch campuses may be included to the extent they wish.

**MEMBERSHIP:**

- Assistant Director for Public Services and Outreach (ex officio)
- Library Webmaster (ex officio)
- Library Data Officer (ex officio)
- 6 Library faculty or staff, including at least 2 reference librarians, chosen by LC after soliciting volunteers

Terms will be for two years, starting in July. (Initial appointments included 3 people with 2-year terms and 3 people with 3-year terms to stagger turnover.)

**GOVERNANCE:**

The Assessment Working Group reports to the Director. The working group will select its own chair for a minimum six month term of office and will meet regularly or as needed. The group will coordinate its activities with other working groups and library departments, as warranted. Working groups will establish procedures and make policy within the scope of their responsibilities. Working groups are accountable for their decisions and are expected to share decisions with library colleagues using the standard working groups procedure. Any proposals generated by the working group that require non-materials budget funding for implementation must be referred to Library Council for funding approval. Similarly, any proposals with very broad policy implications also need Library Council approval. The chair of the working group is expected to update Library Council on its activities on a regular basis.

**SPECIFIC CHARGE:**

- To create an overall assessment plan for the WSU Libraries
- To undertake and coordinate assessments, surveys, etc. aimed at measuring the quality of our services and collections, and the needs and expectations of our clientele
- To ensure assessments are undertaken in accordance with University regulations
- To report the results of said assessments to LC and other working groups
- To make recommendations for changes based on the results of said assessments
- To coordinate WSU's participation in national and regional library assessments of services and collections. This does not include quantitative statistical reports.
- To provide a repository for the results of assessments done by WSU Libraries groups
- To initiate information and training sessions related to assessment
- To disseminate information on assessment initiatives

**DEFINITIONS:**

- **Assess** – to determine the importance, size, or value of something
- **Coordinate** – to bring into common action, movement, or condition: harmonize

Approved by LC: 11-8-00; revised membership 11-15-00; revised 9-11-02; revised membership 06-12-06

- [Decisions Digest](#)
- [Minutes Archive](#)
- [List Serve Information](#)
- [Working Agreement](#)
- [Assessment Web Site](#)
- [Strategic Plan](#)
- [Five Year Assessment Plan \(2002\)](#)