ULS Strategic Assessment Unit plan for FY2014-FY16

Objectives

The ULS Strategic Assessment Unit was set up in September 2013[1] to coordinate data collection and analysis to support both operational and strategic priorities of the ULS system as well as help ULS demonstrate value of its services to all its stakeholders. The Unit comprises 1.75 FTEs and reports to ULS Assistant Librarian.

The objectives of the new Unit include:

1. Implementation and maintenance of a robust library data management infrastructure, which will allow for capture, storage 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 analysis requests.

Stakeholder needs

Internal stakeholders	External stakeholders
ULS Senior Management needs to: • demonstrate value/impact of ULS and its services • promote ULS and its services • fundraise • budget • understand ranking and peer comparisons • report to University and external bodies • understand staff culture and satisfaction _ULS service managers and committee chairs need:_ • evaluation of services: user needs, awareness, satisfaction and usage, measured and perceived value and impact • evidence-based prioritization and	_University administration (faculties and central) need:_ • periodic and ad hoc reports (rankings, trends, impact, strategic directions) • support for grant proposals, accreditations, etc. _Professional bodies and peer institutions need:_ • libraries to share the best practice • periodic and ad hoc reports on inputs, outputs and outcomes

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[1] Prior to that ULS had 1FTE Assessment Librarian.

development of new services • to track progress towards set goals • to carry out staff performance assessment • to develop ability to plan and carry out assessment activities	

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) Development of a business case for investment into library data management system

    i) 14 interviews conducted understand data needs of user groups in ULS (Sept-Oct 2013)

    ii) Four personas developed (using Pragmatic Marketing methodology) (Nov 2013)

    iii) High level system requirements developed, mapped to persona needs and prioritised (Dec 2013-Jan 2014)

    iv) Existing commercial and open source systems reviewed (Feb-March 2014)

    v) Business Case for recommendation made (April 2014)

    vi) Implementation (Fall 2014) – pending approval from Senior Management

2) Ongoing maintenance and development of Sharepoint-based data warehouse or capture and store library data and statistics

3) Creation of the Assessment Unit website (on ULS website) to showcase its activities and ULS statistics

4) Support implementation of new/replacement library systems for capture of data

    i) Development of LibAnalytics forms and reports for capture of reference transactions, instruction sessions, replacement of paper-based forms used in Archives and Special Collections and capture of gate and head counts

    ii) Evaluation and testing of collection management tool Intota Assessment

    iii) Roll out of Plum Analytics and evaluation of Academic Analytics (with Povost's Office)

    iv) Re-evaluation of SAILS (with Provost's Office)

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 owner of strategic actions which use data collection and analysis the strategic actions methodologies call for data collection and analysis as part of the project design

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) migration from Survey Monkey to Qualtrics;

    ii) use of infographics for public facing presentations,

    iii) investigation of use of mobile tools to capture patron records, traffic, etc.

2) Development of a programme 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

3) Study analyzing library collections based on bibliometric profile of Pitt publications

4) ROI analysis study

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

1) Manage annual survey process: development of survey instrument, delivery, analysis and dissemination of findings

2) Develop a template for annual ULS statistics report (use Cornell example)

3) Support all other data/analyses requested from ULS in support of the organizational mission