

INLS 782: LIBRARY ASSESSMENT

FALL 2023
THURSDAYS, 2:00-4:45PM
MANNING 208

COURSE DESCRIPTION

Addresses evaluation and assessment activities in libraries. Existing tools for evaluating library operations will be considered. Students will design and conduct their own evaluation of one or more library systems.

INSTRUCTOR

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She / Her / Hers



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OVERVIEW

Libraries are complex organizations that fulfill, or attempt to fulfill, a variety of needs - informational, social, educational, cultural, technological, and more. Libraries work toward these goals through the operation of interconnected systems and services including staffing, policies, physical and digital space, collections, and programming and instruction. Because of this complexity, the task of evaluating a library's quality, impact, or value is a challenging one.

This course is designed to help you explore methods used to assess library services, space, collections, policies, and staff. Beyond the question of *how* we assess, this course will also focus on *why* we assess and *for whom*, employing a critical lens to interrogate the purposes, products, and possibilities of our evaluation activities. Course assignments will encourage you to both apply existing library assessment methods to realistic evaluation tasks and to reimagine how we might approach these tasks in ways that advance equity and inclusion.

REQUIRED MATERIALS

There is no required textbook for this course; all readings will be linked from our course site in Canvas (canvas.unc.edu).

A note about COVID and masking: Masks are not required, however they are *strongly encouraged* if you are feeling at all ill (even if you're "sure it's just allergies"). You may also choose to attend class via Zoom up to two times; this option will be discussed further in class.



INCLUSION AND STUDENT SUPPORT

My teaching philosophy is grounded in relationships and shared meaning-making. This means that I believe people learn best when they are given the opportunity to construct their own understanding of content through authentic engagement with ideas and with each other. I strive to create learning environments that support and honor students' identities and prior knowledge. Who you are as a learner and as a person matters to me.

It is my intent that the diversity that you all bring to our class be viewed as a resource, strength and benefit. I have worked to include and develop course materials and activities that are respectful of diversity: gender identity, sexuality, disability, age, socioeconomic status, ethnicity, race, nationality, religion, and culture. With that said, research in our field, like most others, has been largely built on a foundation of work from privileged voices (read: white, straight, cisgender, able-bodied, (U.S.) American, male), and I acknowledge that there may be both explicit and implicit biases in the selection of materials for this course. Suggestions for improvements are always encouraged and appreciated.

I understand that you have lives outside of this course, and that sometimes experiences outside of your control may interfere with your class performance (especially now, as we continue to deal with COVID-19). If this happens to you, please reach out. I will do my best to work with you to ensure that you can succeed in the course and that you are aware of SILS and university resources that might help you more generally. One place to find such resources is the Dean of Student's Student Support page: <https://odos.unc.edu/student-support>.

COURSE OBJECTIVES

In this course, students will:

- **identify** and **explore** factors that motivate libraries to evaluate / assess their systems and services.
- **critically evaluate** all stages of the library assessment cycle and its impacts on both dominant and marginalized stakeholder groups.
- **demonstrate** knowledge of available methods and tools for evaluating library systems and services, with a focus on participatory methods.
- **interrogate** the ethics of data collection methods and strategies commonly used to evaluate library systems and services.
- **apply** evaluation methods to investigate contemporary library issues and/or solve practical problems relevant to library work.



GRADING

This course will use the standard H/P/L/F grading system for graduate work. **My focus will be on providing you with actionable, thoughtful, qualitative feedback on all your assignments, including the final project.** So if the feedback you get will be qualitative, how will grades be determined?

- **H:** The “H” grade is reserved for students whose work consistently goes **above and beyond** the stated expectations for a course or individual assignment. In this course, that might mean that you engage frequently and deeply in the class reading annotation discussion (beyond the required posts); you thoughtfully contribute to in-class discussions and activities in ways that foster an inclusive and supportive class environment for your peers and instructor; your assignments are especially thorough; and your final project is exceptionally comprehensive and polished.
- **P:** This grade is earned for work which meets all established assignment and course requirements adequately. If you follow the guidelines for each assignment as they are shared with you on the syllabus and in class, you should expect to earn a P.
- **L:** This grade represents work that is substandard in at least one major way. If you are in danger of earning an L for the course, I will let you know as soon as possible so that you can improve your performance.
- **F:** Work that falls significantly short of expectations.

Rubrics that describe work at each grade level for all assignments can be accessed in Canvas.

ASSIGNMENT #1: RESEARCH METHODS JIGSAW (15%)

Most assessment work that happens in libraries relies on traditional research methods such as surveys, interviews and focus groups, observation, or content / collection analysis. Some of you may have learned about such methods in a different course, but it’s important that all of us have a shared understanding of their uses, strengths, and drawbacks as we build our assessment toolbox in this class. With that in mind, this assignment will introduce you to a variety of methods using a jigsaw approach, in which you become an “expert” on one of these methods and then teach your classmates about the method, while also learning from them about the methods they explored.

On the first day of class, you will sign up for one research method to learn about. In Canvas, you will find a starter list of resources about that method (though you are not limited to these – please feel free to find additional resources!). Your task over the next several weeks will be to learn about the method by reading about it, watching videos, and/or finding published examples of how the method has been used in a library assessment context. You will then synthesize that information into a 2-page handout designed in Canva (Casey will provide you with a link to join our class page there so you will have access to all of Canva’s premium features). Your handout should include:

- The basics about the method (e.g. what is it, what types of assessment questions could it help us answer, does it take different forms?)
- Strengths and limitations of the method, especially as they relate to assessment projects

- Ethical considerations to be aware of when using the method
- List of 3-4 assessment-related studies (with full citations) that have used the method plus brief (1-2 sentence) summaries of each
- List of suggested resources for learning more about the method. These could include the resources I provided for you in Canvas, or they could be other sources that you found helpful.


An example handout (focused on a method that is not one of the options for this assignment) has been shared in Canvas for you. Your handout should be posted to Canvas no later than **11:59pm on Tuesday, 9/12**. In class that week, we will start our in-class discussion in groups of 4-5 people who all explored **the same** method; you will share what you found with each other and make note of anything your classmates found that you did not. Then, we will split into “jigsaw groups,” each containing one person who looked at each method. In these groups, you will have around 10 minutes to teach your classmates about the method you explored, and you will get to learn about the methods that they explored as well.

ASSIGNMENT #2: TOOLS FOR LIBRARY ASSESSMENT (15%)

Collecting, analyzing, and reporting assessment data has become a major activity in many libraries, and both professional organizations and vendors have taken notice. This assignment will work very much like the Research Methods jigsaw assignment. In class on **9/28**, we will have a jigsaw discussion focused on various tools that libraries use to conduct assessment work. Before that date, you will **individually** explore one of the following assessment tools (Dr. Rawson will let you know which one):

- tableau (<https://www.tableau.com/>), access available via the UNC Virtual Lab (virtuallab.unc.edu)
- PLA and ACRL Benchmark: <https://librarybenchmark.org/>
 - Generic login information for PLA: User ID: PLA2201003 Password: Password123!
 - Generic login information for ACRL: Username: US90173 Password: Welcome!
- LibQUAL+ (<https://www.libqual.org/home>) and ClimateQUAL (<https://www.climatequal.org/home>)
- Looker Studio (<https://lookerstudio.google.com/>)
- Project Outcome for public libraries (<https://www.projectoutcome.org/>) AND Project Outcome for academic libraries (<https://acrl.projectoutcome.org/>). *Note: You can create your own accounts on one or both of these sites if you want, but you are also welcome to use Casey’s login info below.*
 - Public libraries generic login: User ID: crawson@email.unc.edu, password: VQ!gXe8@AC8h3w!
 - Academic libraries login: User ID: crheld@gmail.com, password: yVs9x6C7q!q8W7w

Some of these sites and tools are freely accessible or accessible with free registration, while others are paid services. Thus, the information available from these websites might vary. Explore the websites themselves plus any other information you can find about these systems and services (Google, search Twitter or library Facebook groups, reach out to librarians who work with these tools, etc. - be creative!). Create a **one-page** handout-style document that summarizes the resource and post this document to our course Canvas site no later than 11:59pm on **9/27**. In addition to basic information about the tool, your document should include



what you believe to be its strengths and weaknesses (to the extent that you can tell based on freely available information).

In class on 9/28, we will start our in-class discussion in groups of 3-4 people who all explored the same resource; you will share what you found with each other and make note of anything your classmates found that you did not. Then, we will split into larger “jigsaw groups,” each containing one person who looked at each resource. In these groups, you will share the highlights (or lowlights!) of your resource and learn about the resources that your classmates explored.

ASSIGNMENT #3: TELLING ASSESSMENT STORIES WITH DATA (20%)

All assessment projects in libraries use data, collect data, or both. But data alone is not necessarily useful for assessment librarians or meaningful to relevant stakeholders. To make it meaningful, we need to communicate it in a way that is understandable and compelling to our intended audience (which might be library staff, administrators, funders, library users, and/or the broader community). One way that we can do that is by engaging in a process called “data storytelling,” which Dr. Kate McDowell defines as “the art of communicating data as information in story form.”


For this assignment, you will find a dataset relevant to work in a public, academic, or school library context. Examples and sources of publicly available data will be shared in class, however you may also use a dataset that you have access to via your work or field experience with permission from the owner(s) of that data. Using resources to be shared in class, you will explore that dataset and craft a story around it, complete with characters, setting, action, and (perhaps) conflict. Your story should be aimed at a specific audience and should have a specific purpose related to your library’s mission and goals.

We will begin this assignment in class on October 5, and additional details about the assignment will be shared then. Your completed data stories will be shared in the form of *either* a narrated PowerPoint presentation *or* a Looker Studio project page (another format may be acceptable if you prefer – let’s talk about it). You will not need to create sophisticated data visualizations or engage in complex data analysis for this assignment, however if you have those skills from other coursework you are welcome to use them here. **Your completed data story should be submitted via Canvas by 11:59pm on 10/26.**

ASSIGNMENT #4: COLLABORATIVE READING ANNOTATIONS (20%)

We will use the commenting features within Google drive to collaboratively (but asynchronously) discuss our course readings this semester. This is a great way to share your thoughts about a reading, ask questions, or make connections in a low-pressure, informal way. Your comments also allow me to understand what parts of the readings stood out to folks or were confusing, which in turn allows me to better design each week’s class session.

You are not expected to comment on every reading, or even to comment every week. Out of the 12 lessons for which commenting will be available, I would like for you to participate in 9-10 of them (you



are certainly free to comment every week, which would be an example of going “above and beyond” on this assignment).

As with our in-person discussions, please monitor your contributions to ensure that they are respectful and refrain from using derogatory or hurtful language. It is fine to disagree with each other, but when this happens, please critique ideas, not individual people.

Comments do not have to be in formal / academic language. Your comments might fall into several different categories (there are probably others too!):

- Reactions / responses (including emotional responses) to the text. These can be positive or negative - you are definitely not expected to agree with everything we read!
- Questions about the text or inspired by the text.
- Connections between the text and other things you’ve read or experienced.
- Links to related resources that connect to or extend the ideas in the reading.
- Responses to your classmates’ posts.


ASSIGNMENT #5: ASSESSMENT PROJECT POSTER SESSION (30%)

The final assignment for this course will require you to develop a comprehensive, realistic evaluation plan for one aspect of library services or systems in a library context of your choice. The project you design will *probably* be hypothetical, although based on actual library needs as communicated to me by current practitioners. If, however, you happen to work in a library or archive and would like to use this assignment as an opportunity to engage in actual assessment work, you should feel free to do so.

Possible focus areas or “problem statements” for these assignments (contributed by practicing librarians) will be shared in our course Canvas site, however as with our other assignments, you are not limited to those prompts if there is another project you would like to explore. To keep the scope of this assignment manageable, projects will be focused on only one element of library services within a single (real or hypothetical) library: space, collections, policies, instruction, or staff.

Your task will be to develop a comprehensive plan for evaluating this system or service, using the methods we have learned in class and keeping a critical, equity-focused stance in mind. Your final product will be a conference-style poster, similar to what you might create to present at the Library Assessment Conference. Examples of posters from the 2018 conference are available at <https://www.libraryassessment.org/program/2018-poster-schedule/>. I have also linked to some particularly good (or at least interesting) individual posters in Canvas. In addition to the poster itself, which you will turn in as a PDF file, you will also share your poster with a small group of your classmates in the form of an informal presentation on our last day of class. We will talk more about guidelines for this part of the assignment later in the semester. **Both components are due in class on 11/30.**

To scaffold this project, you will be required to turn in two shorter documents earlier in the semester that should help you develop your ideas (this will also be a chance to get instructor feedback before you have put



too much effort into a project idea that might not work). The first is an **initial proposal** that summarizes your early thoughts about potential project focus questions and methods as well as your initial thoughts about what stakeholder groups might be involved in the project you develop or interested in its outcomes. This document can be very brief (a couple paragraphs is fine) and should be turned in via our Canvas discussion board no later than **9/21**. Dr. Rawson will comment on your post; you should also feel free to read through your classmates' posts and provide feedback to them.

The second is a **summary of related work**. When we undertake assessment projects, it is important not to “reinvent the wheel” or try interventions that have already been shown not to work. Therefore, as you develop your assessment plans, you will need to search the literature for similar projects. “The literature” in this case includes both scholarly articles and more informal forms of sharing like blog posts, webinars (often available after the fact on YouTube or Vimeo), or even Twitter threads. For the summary document, I would like you to write a brief (one page, single-spaced) overview of what others have done to address similar assessment needs in their libraries. In addition to summarizing these reports, you can also feel free to note their strengths and weaknesses. The second page of your document should consist of a reference list citing the reports you have found in APA format. This is due on **11/9** and should be submitted in the Canvas forum. After your classmates have posted, you may find it helpful to review the findings of your peers who are tackling similar topics.

Groupwork option: While these projects can be completed individually, you may alternatively choose to complete this work in a pair or small group of 3-4 students. To ensure that students in groups complete roughly the same amount of work as their peers doing this assignment individually, there will be some additional requirements for groups, namely:

- a requirement that the group meet at least twice outside of class time to discuss their work (you don't need to turn in proof of this),
- an additional paragraph submitted with your initial proposal post that outlines the division of labor for your project work, and
- a brief individual reflection turned in with your final poster that asks you to evaluate the group's effectiveness and your own role within it.

COURSE SCHEDULE

Readings, activities, videos, and other materials for each week will be shared in the Lessons area of Canvas.

| Date and Topic | Learning Outcomes | Assignments Due |
|--|--|--|
| 8/24 Why do we assess? | Students will be able to: <ol style="list-style-type: none"> 1. compare and contrast assessment/ evaluation and research. 2. distinguish between “assessing to improve” and “assessing to prove.” 3. describe the organizational contexts in which library assessment work takes place. | Read the course syllabus and respond to the pre-course survey. |
| 8/31 Theoretical foundations of assessment work | Students will be able to: <ol style="list-style-type: none"> 1. compare and contrast neoliberal/positivist and critical theory based approaches to library assessment. 2. articulate a personal rationale for engaging in assessment work. | |
| 9/7 Practical Foundations of Assessment Work | After completing this module, students will be able to: <ol style="list-style-type: none"> 1. define and differentiate among inputs, outputs, and outcomes. 2. describe the steps of the Outcome-Based Planning and Evaluation model. 3. critically evaluate the “practicality imperative” in library assessment work. | |
| 9/14 Applying traditional research methods to assessment | After completing this module, students will be able to: <ol style="list-style-type: none"> 1. describe the strengths and weaknesses of various research methods as they are applied to library assessment. 2. apply knowledge of research methods to the design of a hypothetical library assessment project. | Assignment #1 (Research Methods Jigsaw) – handout posted to Canvas by 9/12; come to class prepared to share this. |
| 9/21 Understanding our Stakeholders and | After completing this module, students will be able to: <ol style="list-style-type: none"> 1. list and describe the needs of stakeholder groups relevant to their specific library context (public, school, academic, | Initial ideas for final project posted in |

| Date and Topic | Learning Outcomes | Assignments Due |
|--|--|--|
| Communities: Assessing For, Assessing With | <p>special, or archive).</p> <ol style="list-style-type: none"> describe strategies for learning about the needs and wants of library users and non-users. analyze the benefits and drawbacks of involving library users, especially those from marginalized communities, in assessment work. describe the Participatory Action Research framework and suggest specific applications for this framework within library assessment work. | Canvas by this date. |
| 9/28 Library Assessment Tools | After completing this module, students will be able to: <ol style="list-style-type: none"> describe the features of commonly used library assessment tools. evaluate the benefits and drawbacks of commonly used library assessment tools for a specific library setting. | Assignment # 2 (Library assessment tools) – handout posted to Canvas by 11:59pm on 9/27 |
| 10/5 Communicating your Assessment Findings: Data Storytelling | After completing this module, students will be able to: <ol style="list-style-type: none"> identify common types of stories that can be told with library data. create a story using publicly available library data. | |
| 10/12 | No Class – University Day Ceremony | |
| 10/19 | No Class – Fall Break | |
| 10/26 Assessing Library Space (physical and digital) | After completing this module, students will be able to: <ol style="list-style-type: none"> critique published examples of library space assessment projects. generate ideas for library space assessment projects that center equity and inclusion. | Assignment #3: Data story sketch posted to canvas by 11:59pm |
| 11/2 Assessing Library Collections | After completing this module, students will be able to: <ol style="list-style-type: none"> critique published examples of library collections assessment projects. generate ideas for library collections assessment projects that center equity and inclusion. | |

| Date and Topic | Learning Outcomes | Assignments Due |
|--|--|---|
| 11/9 Assessing Library Services (e.g. reference, ILL, tech services) | After completing this module, students will be able to: <ol style="list-style-type: none"> critique published examples of library services assessment projects. generate ideas for library services assessment projects that center equity and inclusion. | Summary of related work for final projects |
| 11/16 Assessing Library Programming and Instruction | After completing this module, students will be able to: <ol style="list-style-type: none"> critique published examples of library programming and instruction assessment projects. generate ideas for library programming and instruction assessment projects that center equity and inclusion. | |
| 11/23 | No class – Thanksgiving Break | |
| 11/30 | Poster session: Presentation of final projects | Final posters |
| | Poster session: presentation of final projects. | |

UNIVERSITY HONOR SYSTEM

The University of North Carolina at Chapel Hill has had a student-administered honor system and judicial system for over 100 years. Because academic honesty and the development and nurturing of trust and trustworthiness are important to all of us as individuals, and are encouraged and promoted by the honor system, this is a most significant University tradition. More information is available at <http://www.unc.edu/depts/honor/honor.html>. The system is the responsibility of students and is regulated and governed by them, but faculty share the responsibility and readily commit to its ideals. If students in this class have questions about their responsibility under the honor code, please bring them to me or consult with the Office of the Dean of Students. The web site identified above contains all policies and procedures pertaining to the student honor system. We encourage your full participation and observance of this important aspect of the University.

STUDENTS WITH DISABILITIES

The University of North Carolina at Chapel Hill facilitates the implementation of reasonable accommodations, including resources and services, for students with disabilities, chronic medical conditions, a temporary disability or pregnancy complications resulting in difficulties with accessing learning opportunities. All accommodations are



coordinated through the Accessibility Resources and Service Office. See the ARS Website for contact information: <https://ars.unc.edu> or email ars@unc.edu.

SILS DIVERSITY STATEMENT

In support of the University's diversity goals and the mission of the UNC School of Information and Library Science, SILS embraces diversity as an ethical and societal value. We broadly define diversity to include ability, age, ethnicity, gender, gender identity, gender expression, immigration status, national origin, race, religion, sexual orientation, and socioeconomic status. As an academic community committed to preparing our graduates to be leaders in an increasingly multicultural and global society we strive to:

- Ensure inclusive leadership, policies, and practices
- Integrate diversity into the curriculum and research
- Foster a mutually respectful intellectual environment in which diverse perspectives and experiences are valued
- Recruit and retain students, faculty, and staff from traditionally underrepresented groups
- Participate in outreach to underserved groups in North Carolina and beyond

The statement is our commitment to the ongoing cultivation of an academic environment that is open, representative, and reflective of the concepts of equity and fairness.

~The Faculty and Staff of the UNC School of Information and Library Science

