

Creating, Recalibrating, and Collecting Assessment Metrics for Strategic Initiatives and Annual Reporting

A Case Study at Virginia Tech

Ellie Kohler and Connie Stovall

University Libraries at Virginia Tech

Abstract

Purpose

This paper presentation shares the approach taken by the Data Analytics Team at the University Libraries at Virginia Tech (Blacksburg, VA, USA) to create and execute a program intended to streamline measurement outcomes tied directly to library strategic initiatives. Further, it provides insight into the challenges of adopting a systematic approach to measuring the impact of strategic initiatives, as well as discusses implementation practicalities. The program includes three essential components: 1. holistic integration of library strategic initiatives into the daily processes and procedures, 2. impact methodology, and 3. annual reporting processes for metrics communication.

Design, methodology or approach

In 2017, the University Libraries created its 5 year strategic plan. The plan included 10 strategic areas, 29 initiatives, and over 115 metrics intended to measure initiative success or impact on patron success. Starting in late 2018, the team re-evaluated the metrics and took steps to implement and integrate data collection strategies into the annual reporting structure. The team directed and guided colleagues through collaborative working sessions and included all levels of staff. While individual strategic initiatives are in different implementation phases, the presentation includes an account of data collection methodologies, data presentation practices, and data-driven decision-making in practice.

Findings

One of the most difficult and time intensive parts of the metrics review process was scheduling meetings, and overall success of the process was mixed. Review of metrics found that about 35 percent of the revised metrics were known to be uncollectible. However, once further into the collection process, the percentage increased to 55 percent. Metrics were reduced from 115 to 93 but the metrics but became more complex. The amended metrics were able to provide a basis for data collection for future budget models. Formal data management practices are needed. Much confusion exists because no central data dictionary currently exists and the University Libraries lack a standardized data collection system.

Conclusions

Gains were made in standardizing of University Libraries data collection, especially in making connections between different departments that may be working in the same strategic areas. The Data Assessment Team was able to gain direct access to departmental data that was previously not available. The communication between departments and the Data Analytics team increased, and anecdotal feedback leads the researchers to believe that trust levels increased, especially in terms of the teams' ability to ensure data privacy.

References

- Booth, H. and Hendrix, D. (2015), "Libraries and Institutional Data Analytics: Challenges and Opportunities", *The Journal of Academic Librarianship*, Vol. 41 No. 5, pp. 695-699.
- Curcio, A. A. and Lynch, M. A. (2017), "Addressing Social Loafing on Faculty Committees", *Journal of Legal Education*, Vol. 67 No. 2, pp. 242-262.
- Saunders, L. (2016), "Room for Improvement: Priorities in Academic Libraries' Strategic Plans", *Journal of Library Administration*, Vol. 56 No. 1, pp. 1-16.
- Urquhart, C. (2018), "Principles and Practice in Impact Assessment for Academic Libraries", *Information and Learning Science*, Vol. 119 No. 1/2, pp.121-134.
- University Libraries (2017), "University Libraries Annual Report 2016 -2017 and Strategic Plan 2017 - 2022" available at https://lib.vt.edu/content/dam/lib_vt_edu/about/strategicplan/AnnualReport2016-2017_and_Strategic%20Plan2017-2022.pdf (accessed July 2019).

Submitted to Open Access Journal, so not included in Conference Proceedings