ASSESSMENT TOOLS FOR SUCCESSFUL LIBRARY EVALUATIONS

A Practical Guide



Editor

HOLT ZAUGG

Assessment Tools for Successful Library Evaluations

Assessment Tools for Successful Library Evaluations is an essential resource for practitioners, educators, and students seeking to develop or enhance their library assessment practices. Zaugg provides clear explanations of core assessment methods, including focus groups, interviews, surveys, usability testing, visual assessments, and more. Each methodological chapter is paired with practical case studies contributed by library assessment practitioners from around the world, which illustrate how these approaches are applied in real-world settings. This approachable resource helps librarians overcome common speed bumps in assessment and build confidence in data-driven decision-making.

—*Rebecca A. Croxton*, PhD, Associate Professor and Strategic Assessment Librarian, Colorado State University Libraries, USA

The book offers practical exposure to assessment and evaluation work and explains several techniques used in assessment, evaluation, and usability testing. It is a unique resource, the first of its kind, which provides comprehensive understanding of tools and techniques for successful library assessment. Numerous case studies enrich readers' understanding immensely. This valuable resource and reference guide equips students, information scientists, library professionals, researchers, faculty members, academic administrators, and policymakers with comprehensive insights into library assessment and usability testing, along with the nuances of evaluation tools and techniques. It is a must-read for library professionals working in all types of libraries who want to revamp their functioning.

—*Dr Raj Kumar Bhardwaj*, St Stephen's College, Delhi, India

Assessment Tools for Successful Library Evaluations: A Practical Guide

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INVESTOR IN PEOPLE

To my wife, Monica, for all of her endless support of my academic efforts – and the dogs, I can't forget our dogs.

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Introduction to First Section

Back in 2014, it seemed that every week came with advertisements for assessment librarians, data analysts, or UX people in academic libraries. Commensurate with this growth came networking and learning opportunities through conferences (e.g., library conferences with a focus on assessment), webinars, and workshops where evaluation experts could learn from each other and grow in confidence. Library assessment has become a robust community of dedicated library specialists who help librarians define and explain their value to those they serve and to discover what else needs to be improved. Whether starting or working to further a community of assessment, there comes a point where you want to try something else that may offer a better perspective on what has happened and is happening. It is not a one-and-done process but a journey that helps you to improve data collection and use. At times, a journey begins with speed bumps that seem overwhelming but are really quite easy to overcome with the proper training and experiences.

This book's purpose is to help you get over the speed bump and further develop your assessment and evaluation skills by adding assessment tools that are usable and helpful. To this end, this book has two sections. The first focuses on tried and true assessment methods along with some newer and innovative evaluation activities. In alphabetical order, but not order of importance, these chapters discuss focus groups, interviews, observations and ethnographies, surveys, usability testing, and visual methods. Each of these chapters uses a similar outline to discuss the method. Specifically:

1. Introducing the method.
2. Library use: When, where, why, and how it may be used to assess:
   (a) Services.
   (b) Spaces.
   (c) Resources.
   (d) Interactions (among employees and between employees and patrons).
3. How to use the method:
   (a) Pre-data collection activities.
   (b) Data collection activities.
   (c) Post-data collection activities.
4. Unique features of the assessment method.
5. Advantages and disadvantages of the method.

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Each chapter in this section is filled with direction and brief examples to illustrate the method – somewhat of a sampler chapter on the method. The second section contains specific, in-depth examples of how an assessment method was used and applied to a specific evaluation. None of the chapters are the end-all and be-all of conducting assessments, but the hope is that each chapter will help a practitioner know if the assessment method is suitable for what they want to assess. I also hope that each method will add to your skill level in assessing and evaluating the value of what you do and helps you to collect data to improve.

I sought to have examples from around the globe and at different libraries so that those in libraries may see themselves. While I was able to get authors and examples from around the world, this book is quite academic library heavy, but it can be used by those in all levels of libraries. My hope is that it will be a relevant source for anyone working within any library or training to become a librarian.

This book may be read front to back, but each chapter is a stand-alone chapter with an associated deep example in the second section. The example authors have openly discussed their use of an assessment tool, including things that could have gone better. I wish you all the best on your assessment journey.

Chapter 1

An Introduction to Focus Groups

Holt Zaugg

Brigham Young University, USA

Introducing the Method

While focus groups (FGs) originated in marketing and product design, some form of group interviews has likely been around as long as sociologists have collected data, with some researchers indicating the use of FGs as early as the 1980s (Conrad & Alvarez, 2016; Levers, 2006; Morgan, 1996). The idea was to get a group of people together and have a moderator guide the discussion to explore ideas with consumers so that the final product could be modified and improved (Conrad & Alvarez, 2016; Greenbaum, 2000; Levers, 2006). Researchers in the social sciences have adopted this concept to gain insights and improve understanding, and it is a common technique used now in evaluation.

While some describe FGs as a group interview, it is somewhat more complex in that FGs also use the interplay and discussion of the group members. In this way, group members can feed off other's comments as they agree or disagree. Often, comments from one participant will spur recall of similar or different experiences. An FG provides the opportunity for in-depth probing of patrons' experience with library operations and their thoughts about the library (Rosenthal, 2016; Simon, 1999). The FG also provides the opportunity to gather data and insights that would otherwise be difficult to get through quantitative or conventional statistical means (Levers, 2006). In using the analogy of a lake, quantitative data are the surface of the lake, and FGs are a group that dives deep into one or more areas of the lake. The result provides a keen understanding of the issue being discussed.

Library Use: When, Where, Why, and How It May Be Used

FGs have several meaningful uses within libraries, especially in regard to services, spaces, resources, and interactions. The following are just a few instances where FGs have been used within a library. FGs are often used in conjunction with other assessment methods to help triangulate findings and provide a more

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complete understanding. Examples may vary depending on the type of library and its operations.

Services

Brigham Young University (BYU) Library's Research and Writing Center (RWC) offers one-on-one counseling for students seeking to find resources for homework, papers, and research, as well as suggestions for writing. It is a collaboration of the library (the research side) and the university's writing center. Initially, it occupied a small room on the main floor of the library that was vacated when the popular reading materials were moved to a renovated space in the library (Harold B. Lee Library, Unpublished Internal Space Use Report).

In addition to the quantitative stats indicating the number of students served and the wait and consultation time needed, FGs of RWC student employees and students who used the RWC examined the efficacy of the RWC in assisting student learning. The FGs delved into topics regarding how the consultations were conducted, as well as things that helped and hindered the consultations. It provided information to develop a new space that better served students. For example, the prototype space was quite crowded, and consultations often interfered with adjacent consultations. There was no space for those waiting to be helped, and the registration process was a bit clunky. FGs with students who used and worked in the RWC helped to identify these issues and offered workable solutions.

In the renovated space, the RWC meets student needs without being overcrowded. Consultations do not interfere with each other, and student-employee roles are better defined. The results of the FGs helped with the onboarding and in-service training of student employees by identifying issues that needed to be addressed and solutions to the issues.

Another study with the University of Toronto library examined how libraries may provide data management that aided researcher funding requests and journal requirements (Perrier & Barnes, 2018). The study used a positivist design to plan and conduct FGs that could capture true, real-world representations, extending insights beyond quantitative measures. They used 3–5 FGs with 5–10 participants each, and once saturation was achieved, no more FGs were conducted.

Those conducting the FGs found harmony on universal issues. Many strategies for supporting the management of research data were mentioned and discussed. The result identified how the library could offer services and support that are beneficial to researchers.

Borrelli et al. (2019) investigated first-generation students' perceptions of library employees using four FGs, each with eight students. The assessment sought to determine the role that library employees could play in helping first-generation students learn how to use their library, how students' perceptions of the library changed as they moved through their education, and which experiences influenced these changes. Participants were drawn from a pool of students who self-identified as first-generation students. Participation was incentivized with food and $20. Two of the FGs used freshmen students, and two used juniors and seniors, all of whom were first-generation students.

Researchers determined the impact and limitations of time, orientations, library instruction, and limited interactions with library employees. First-generation freshmen students did not know what the library offered and how it could help. However, as they engaged with the library and its employees over time, first-generation students were able to build on and use their library capital to succeed in their learning activities. This discovery helped students strengthen their self-efficacy, independence, and resilience.

Spaces

The BYU Library has an experiential learning room (ELR) where cross-discipline creativity courses focused on real-world problems are taught. Initially, the room was set up as a prototype where classes could be taught while the idea of the ELR and its needs were explored and developed. Assessments also examined what types of library services could or should be parallel to the space to assist with learning.

FGs used students who took creativity courses, faculty who taught the creativity courses, and library employees who collaborated on the course project to better understand what the end space should look like – the type of furniture, electronic amenities, and the types and sizes of spaces within the area. FGs using each of the three groups – students, faculty, and librarians – provided a three-way, 360-degree view of what the final space could look like and should have (Zaugg & Warr, 2018).

Cigarini et al. (2021) sought to determine the potential use and impact of citizen science in Barcelona's network of public libraries to promote social inclusion and to keep public libraries relevant as spaces for gathering, meeting, and collaboration. Librarians attended instruction sessions to help them learn how to integrate citizen science into their library operations. Data collection used pre- and post-lesson questionnaires and an FG at the end of the project. The questionnaires indicated a high level of satisfaction with the process. The FG offered insights from librarians on how they could better interact with those who have differing perspectives. The results enabled them to move beyond traditional disciplinary fields, attract new library users, and create new local connections. FG comments from librarians indicated that the experience with citizen science offered insights and opportunities to learn new practices and to change their understandings, both of which benefited the library and its patrons.

Resources

In 2014, the BYU Library released a new website with the same look on several access devices (i.e., smartphones, computers, and tablets). To evaluate the efficacy of the website, FGs using faculty, undergraduate students, and graduate students were held (Rennick et al., 2015; Zaugg et al., 2015a, 2015b). They displayed the website on a screen and asked those in each FG about specific issues ranging from the look and feel of the website to usability issues (e.g., finding a resource on the website). The FGs provided insight into what was working well with the

new website, but they also identified troublesome areas. FG participants also requested additional features on the library website, many of which were added. The result was a website that worked well as the online portal to the library.

Interactions

Bangani and Dube (2022) conducted research to determine the effects of academic libraries participating in civil engagement in South Africa. The study used interviews with library heads and FGs with library staff to better understand the impact of civil engagement. Invitations to participate were sent to 26 public university libraries, from which 20 interviews were conducted with library heads, 8 online FGs with 33 librarians, and 5 telephone interviews with community members.

From these two sources of data collection, researchers determined that partnerships via civil engagement led to more partnerships with reciprocal benefits – it led to an improved relationship between the library and the local community. The data from the interviews and FGs demonstrated the value of such relationships and provided an incentive to continue these relationships and form additional partnerships.

BYU Library's human resources (HR) office sought to examine gender equity issues within the library. As work progressed on this assessment, it expanded to include several other HR-related issues. In addition to a rather lengthy survey, FGs and interviews were used to understand the survey results better. Each FG was created using gender and library status as determining features. For example, either men or women were in an FG, but no FG was a mix of men and women. They also divided participants by their status, so no supervisor was in an FG with employees who were supervised. Additionally, they separated faculty, administrative, and staff employees. Finally, an outside moderator was used to conduct, transcribe, and de-identify the responses prior to analysis (Harold B. Lee Library, Unpublished Internal Space Use Report).

The FGs enabled employees to openly discuss their experiences with library policies and procedures. It helped identify actions that were working well and those that were less effective. The FGs provided a greater understanding of the survey results, specifically why some survey options were selected. It improved our understanding of the "why" behind quantitative responses.

How to Use the Method

While it is easy to think of FGs as "let's get a group of people together and ask them a bunch of questions," FGs are a bit more complicated. There are different options for preparing, conducting, and analyzing the data. This description offers a perspective of how an FG may be conducted based on pre-FG activities, the FG, and post-FG activities and analysis. Other perspectives may vary somewhat. FGs may be conducted in person or online. Most activities are somewhat similar, but there are some key differences. These differences are highlighted where applicable.

Pre-FG Activities

The first activity is to determine the purpose of the FG (Rio-Roberts, 2011). What understanding do you hope to obtain from the data? How do you hope these data will describe value or assist decision-making? Most importantly, is there a better way to collect the data you need? It is also important to know if the FG is delving deeper into a subject to increase understanding of other collected data (e.g., survey or observation) or if it is more exploratory to help determine what to look for in an observation or what type of questions may be used on a future survey. With these questions answered, it is time to start the planning activities.

Questions

Writing the questions becomes an important activity as you want to craft the questions to be open ended and invite conversation. The questions should be neutral in their tone and context and focus only on one topic (Rosenthal, 2016). There are those who promote a "devil's advocate" role where questions are slanted to the opposite of opinions expressed by participants. This approach should not be used because of the negative influence it may have on participants. The questions should be probing questions that invite discussion and comment. It is always a good idea to vet the questions with co-workers or use them on a pilot FG to determine if they are eliciting the responses you need. They should also be worded to meet the age level of participants. Questions for a teenager's FG would be different from an FG of their parents or college-aged participants (Fusch et al., 2022). Question sequencing typically moves from general to more specific questions, but this depends on the purpose of the FG and the sensitivity of the topic being discussed (Levers, 2006; Rosenthal, 2016).

Rosenthal (2016) identifies six types of questions: experience or behavior, sensory, opinion or value, knowledge, feeling, and background or demographic questions. Each type of question has its place in an FG but not all may be used in an FG. For example, if an FG examines a new website and participants have not seen or used the new website, any experience or behavior questions would not be important, but there would be an increased emphasis on opinion and feeling questions.

Location

The location of the FG should be inviting and professional looking. The space will help determine the size of an FG. Participants should not be cramped together but have sufficient spacing between them. If you have males and females in the same group, you may wish to consider ethnic and cultural values that would increase the distance between men and women. Often, libraries have meeting or conference rooms, with or without a table, that would serve well for FGs.

Online FGs preclude the need to arrange for a room or set up recording devices (Johnson & Odhner, 2021). However, the moderator should ensure that backgrounds are appropriate and that the lighting allows participants to see them clearly. The facilitator and moderator should be familiar with the equipment being used as this becomes a virtual FG space.

Participants

FGs range between 4 and 14 participants in addition to those conducting the FG depending on the nature and purpose of the FG (Conrad & Alvarez, 2016; Fusch et al., 2022; Greenbaum, 2000; Levers, 2006; Roach, 2014). The principle behind the FG size is that you want enough people to respond to and discuss your questions but not so many that there is not enough time to respond. Fusch et al. (2022) suggested inviting more participants than needed in case some do not show up, but this strategy can backfire if you over-invite and everyone does show up. It is important to know your participant pool to determine if the number of invited people showing up will be large or small.

It is also important to have participants in each FG as similar as possible based on key demographics. Age range is key to FGs, with some suggesting a difference of no greater than three years. Position status is also important for FGs – imagine hosting an FG that includes teenagers and schoolteachers. Even if the teenagers were not students of the teachers, there would be a definite awkwardness to the type of responses you may get. Other differences may include key distinctions between supervisors and the employees they supervise, females and males, religious or ethnic distinctions, and family relations (e.g., parents and their children). A wide variety of demographics can be used, so it is important to focus on key demographics. For example, BYU Library's Assessment Department has never had undergraduate students, graduate students, or faculty in the same FGs. In one series of FGs with library employees, we ensured that supervisors were in one group and those supervised were in other groups. The key factors used to identify potential FG participants will also be determined by the purpose of the FGs.

Timing

The day and time of the FG is also important. For example, an academic library may have a policy that only allows food to be used as a participant incentive if the FG occurs around lunch time. However, FGs held around the lunch hour also have the benefit that students are already on campus and typically have a break around the lunch hour.

An FG can be up to 120 minutes (Borrelli et al., 2019; Greenbaum, 2000), and the duration is determined by the number of participants, the topic, and the number of questions. The key is to let participants know the maximum duration of the FG so they can determine if they are willing and able to spend that amount of time. Incentives to participate should reflect the amount of time participants will be participating. For example, incentives may include lunch (e.g., pizza), and others include food and a cash award. The incentive should suit those attending the FG (Borrelli et al., 2019; Fusch et al., 2022).

Regarding time of day, it would be more difficult to have teenagers come during school or work hours. Look for adjacent time periods that work for participants – for example, hold an FG for teens right after school or before or after an event they are involved in. Parents may be asked to come after work. The day and time you pick are determined by what is convenient for your participants, not those conducting the FG. For online FGs, it is important to consider time zones if your FG extends beyond a single time zone. It is good to indicate the time