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### 2023 Learning & Outreach Services (UNM University Libraries) Assessment Framework

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# LORS ASSESSMENT FRAMEWORK

Last updated: January 2023

## **1: Introduction**

The Learning and Outreach Services (LORS) department within the College of University Libraries and Learning Sciences (ULLS) is composed of twelve faculty librarians who act as liaisons to UNM academic and student support departments, programs, and offices, and promote information literacy across the curriculum on behalf of the University Libraries. Key strategic planning information about ULLS and LORS, including our missions and visions, are collected in *Attachment A*.

### *LORS Activities*

The LORS department supports our communities (primarily students, faculty and staff of UNM main campus) through the provision of the following services:

- Collection development of digital and print resources, including databases, journals, monographs, multimedia, and other formats
- Instruction through credit courses and course-integrated instruction, curriculum-integrated instruction, and workshops
- Outreach to build relationships and communicate the services we offer to our communities (collections, instruction, reference)
- Reference services, provided thorough research consultations and digitally via the LibGuides platform

This document outlines the scope of LORS' efforts for assessment within the department, supports assessment planning within the LORS team, and illustrates the alignment of department projects with strategic planning both at the campus level (the UNM 2040 strategic plan may be found at <https://opportunity.unm.edu/>) and within the college (the strategic priorities identified by ULLS are available at <https://goto.unm.edu/library2025>).

This framework outlines LORS' assessment approach and processes for assessment reporting and includes a collection of tools to help ensure data (quantitative and qualitative) collected is well shared and applied. Finally, it includes templates for individual assessment projects, and for assessment plans comprised of a group of assessment projects.

Mindful that frameworks are living documents, the convened working team recommends a revision schedule for this protocol that encourages adjustments and iterations necessary to keep the structure agile and relevant.

## **2: LORS Assessment Approach**

The LORS assessment program focuses on the twin goals of improvement and understanding our impact. We use assessment to help us to pursue meaningful goals in sustainable ways, in alignment with college and university priorities.

### *Organizing principles for assessment*

What happens to assessment when we consider it an ethical, value-based, social practice for the social good? With this question in mind, our assessment goals will reflect and support our values (sustainability; justice, equity, accessibility, diversity, and inclusion (JEADI); integration with ULLS; and expertise). We will assess in ways that respect our students, our colleagues, and ourselves. Reflection is central to this type of assessment practice, which includes working with colleagues to make deliberate choices about what and how we assess. While gathering data is always a part of any assessment process, a narrow pursuit of an increase/decrease in specific numbers is contrary to a reflective assessment practice. Our overarching goal is to use techniques of assessment to understand and improve our practice.

### *Assessment priorities*

Priorities are established in consultation with all members of LORS and may represent requirements of national organizations such as the Association of Research Libraries, limited term or scope assessment projects, and ongoing larger assessment efforts. Priorities may shift over the course of the year but are revisited annually in order to update the Assessment Plan. Assessment priorities will reflect and enhance both our values and strategic directions. Our current priority is to document ongoing assessment efforts and make intentional decisions about future assessment.

Currently LORS collects instruction statistics for all library instruction sessions conducted by LORS and other library staff. Other assessment efforts underway include a curriculum mapping project, individual instructor classroom learning assessments, Research Clinic student satisfaction surveys, post-workshop participant satisfaction surveys, and intermittent data gathering to inform decision-making (e.g., scheduling Research Clinics). Some of this assessment is conducted on an ad hoc, voluntary, and inconsistent basis.

## **3: Assessment Planning**

LORS will use a written assessment plan as the primary tool for documenting and tracking the department's assessment activities. LORS assessment plans will cover a set period of time. The effective dates for a plan are likely to cover one or two years, but LORS members are encouraged to adopt whatever time frame makes sense at the time of plan development (either shorter or longer). However, note that routinely writing and/or updating these plans on a relatively brief schedule or cycle will help keep assessment as a topic at the top of mind for LORS members, promoting consistent integration of assessment into our regular work. An annual cycle also promotes ongoing, consensus-building dialogue among LORS members about assessment priorities. For each assessment plan, LORS will also create a related assessment report at the end of the covered period (see *Section 5: Assessment Reporting & Archiving* below).

LORS members may choose to initiate the planning process for developing a new assessment plan for either a calendar year-based cycle (December/January), a fiscal year-based cycle (June/July), or an academic year-based cycle (August/September) according to the department's needs. The complete life cycle for an assessment plan entails five steps that can overlap. See *Figure 1* for details.

The Director of LORS or their designate(s) will have primary responsibility for developing the assessment plan and its corresponding report. All LORS members will have the opportunity to contribute ideas and feedback throughout the assessment planning process. It is important to ensure group consensus, particularly regarding setting assessment priorities and establishing assessment projects.

**Fig. 1 Assessment Cycle**



An assessment plan contains the following sections:

- Plan effective dates
- LORS mission
- Plan overview/Assessment priority areas
- Current LORS departmental goals (with cross-walking to ULLS strategic priorities and specific assessment projects)
- List of new and ongoing assessment projects that LORS will implement during the plan's effective dates

In order to make writing assessment plans as simple and efficient as possible, LORS members can use the Assessment Plan Template (see *Attachment B*). Assessment plans are intended to capture decision-making around assessment without becoming too onerous. Concise writing with bullet points will be favored over lengthy narratives.

One of the most important features of the assessment plan is that it provides a place to capture basic information about all LORS assessment activities in one document. This includes a list of assessment projects that can be updated as needed throughout the life of the assessment plan. Incomplete assessment projects can roll over from one assessment plan to the next.

LORS members who design and/or implement assessment projects will capture basic information about their project using the LORS Assessment Project Template (see *Attachment C*). Whoever drafts a LORS assessment plan can use the information from the individual project templates to complete the master list of current/ongoing assessment projects in the assessment plan.

#### **4: Processes and Tools**

Steps for assessment projects will include

1. Reviewing framework during project development
2. Adapting assessment project template to current project
3. Sharing project documentation within LORS
4. Reporting out project findings on annual basis

Resources available to LORS members include assessment resources gathered by the assessment team, relevant research literature, tools, and the growing collection of projects shared by members of the team. Examples of tools used for steps one and two include Qualtrics for surveys, the SpringShare LibApps Suite for surveys and instruction and outreach statistics collection and analysis, and the MS Office Suite. Along with these, NVIVO and Dedoose for qualitative data, R and other quantitative data software programs, Piktochart, and the Adobe Creative Suite are tools available for steps three and four.

#### *Impact Map*

The LORS Impact Map (see *Attachment D*) is designed to help LORS align our services with institutional and college strategic priorities and goals. It helps us understand how we contribute to institutional and college success, and target areas for assessment. It can also help us identify new possibilities, as well as consider ongoing efforts.

#### **5: Assessment Reporting & Archiving**

- Our assessment program exists for LORS to collect information on questions in which we are authentically curious about the answers.
- Assessment findings will be used to drive positive change in LORS programs and practice.
- Assessment findings will be reported to LORS as a collective to review and make decisions and shared with other stakeholders as needed.
- At the end of the annual assessment cycle a written report on the assessment plan and any projects should be shared and archived. Reports should include items such as: summary findings, progress towards stated objectives and outcomes, any recommendations and/or next steps / action items.
- Data (quantitative and qualitative) gathered as well as assessment plans, documents, and reports will be archived so that they are easily accessible and usable by LORS members in the future.

- LORS will also collect data needed by national, state and organizational entities (e.g., ARL) to share with the UL's Assessment Office (Director of Assessment Teresa Neely).

## **ATTACHMENT A: Key Strategic Planning Elements**

### **CUL&LS Mission**

The College of University Libraries and Learning Sciences (UL&LS) supports our communities by providing expertise, instruction, services, spaces, and collections that advance scholarship, teaching, and intellectual discovery.

### **CULLS Vision**

Our college will be a competitive advantage for UNM and the state of New Mexico.

### **LORS Vision**

We believe people have a right to access accurate information; it is a foundation of democracy. LORS promotes discovery and learning at UNM as a leader of information literacy and an essential partner in research, scholarship, and creative works.

### **LORS Strategic Directions**

- LORS is a campus-wide undergraduate research driver.
- LORS is the leader of information literacy efforts at UNM and promotes Information and Digital Literacy across the curriculum.
- LORS innovates as a team.

### **LORS Guiding Principles / Values**

- **Sustainability:** We build our programs with sustainability and maintenance in mind, keeping things like workload, efficiencies, and ideas for new ways to do old things at the front of our minds. We evaluate ongoing commitments as we consider new projects.
- **Diversity, Equity, Inclusion, and Accessibility:** We consider DEIA in everything LORS does, internally and externally.
- **LORS integration in CUL&LS:** We have strong collaborations with other library units to support organizational priorities
- **Expertise:** We grow individual and group strengths to maximize our impact and expertise.

## ATTACHMENT B: LORS ASSESSMENT PLAN TEMPLATE

Plan Effective Dates			
LORS Mission			
Plan Overview / Assessment Priority Areas			
Current LORS Goals			
LORS Departmental Goal	Aligns with ULLS Strategic Priorities	Team Members	Related Assessment Projects
Current LORS Assessment Projects			
Project 1: Ongoing Data Collection			
<b>Timeframe</b>	Annually. Unlike most projects, this project will not eventually conclude.		
<b>Project Leader(s)</b>	Amy Jackson, Lori Townsend		
<b>Description</b>	<b>Project Goal:</b> LORS contributes key data/metrics to the Director of Assessment in order to fulfill University Libraries' responsibility to deliver information for annual statistics to national-level organizations, such as the Association of College and Research Librarians (ACRL) or the Association of Research Libraries (ARL).		
	<b>Objectives/Tasks:</b>		



	<ul style="list-style-type: none"> <li>• Collect required data throughout the year using Springshare products (i.e., LibCal, LibInsight).</li> <li>• Data is reported to the Director of Assessment on a calendar-year basis. This typically involves running Springshare reports and then the Director of LORS emails the data to the Director of Assessment.</li> <li>• The deadline to submit data for the ACRL Academic Library Trends and Statistics Survey through the Integrated Postsecondary Education Data System (IPEDS) is usually in March.</li> <li>• The deadline to submit ARL statistics is usually in April.</li> </ul>
	<p><b>Information/Data to Collect:</b> The data collected under the umbrella of this project have included (although each year's statistics may be subject to change):</p> <ul style="list-style-type: none"> <li>• Instruction statistics (primary responsibility in Learning Services) <ul style="list-style-type: none"> <li>○ Number of synchronous presentations</li> <li>○ Total attendance at all synchronous presentations</li> <li>○ Number of asynchronous presentations</li> <li>○ Total attendance at all asynchronous presentations</li> <li>○ Number of all presentations to groups</li> <li>○ Total attendance at all presentations to groups</li> </ul> </li> <li>• Consultation statistics (based on LibCal appointments with subject specialists)</li> <li>• Reference statistics (based on Ref Analytics)</li> </ul>
	<p><b>Assumptions:</b></p> <ul style="list-style-type: none"> <li>• It is everyone's responsibility to capture required data to the best of their ability/knowledge. However, we acknowledge that there may be some gaps. For example, consultations scheduled through LibCal are captured as consultations, but those scheduled via email may not be captured (but those meetings may still be reflected as reference transactions in Ref Analytics).</li> <li>• We do not currently use these data for internal LORS assessment purposes, although we potentially could in the future.</li> </ul>
	<p><b>Envisioned Outcomes:</b> [How do we plan to use the answer(s) to change LORS' practices?]</p> <ul style="list-style-type: none"> <li>• The primary outcome is that we are able to contribute data to fulfill UNM reporting requirements.</li> <li>• We could realize some benefits from looking through old statistics to identify trends or gaps.</li> </ul>

<b>Roles and Responsibilities</b>	The Director of LORS reports data to the Director of Assessment. The Director of Learning Services contributes to compiling the data for instruction statistics. Everyone in LORS submits data to reflect their instruction and reference activities in the final counts.
<b>Key Partners</b>	For this project, there is limited collaboration outside of LORS. However, we typically coordinate with the following library units in the course of this project: <ul style="list-style-type: none"> <li>• Director of Assessment</li> <li>• Access Services</li> </ul>
<b>Resources Needed</b>	There is no monetary budget associated with this project. Non-monetary resources include: <ul style="list-style-type: none"> <li>• Staff time</li> <li>• Springshare data collection tools</li> </ul>
<b>File Management</b>	We do not maintain internal reporting records within LORS. The raw data is stored within LibCal, LibInsight, Ref Analytics and other data collection tools.
<b>Project 2: [Title]</b>	
<b>Timeframe</b>	[Dates]
<b>Project Leader(s)</b>	[Name(s)]
<b>Description</b>	<b>Project Goal:</b> [What question(s) does this project ask?]
	<b>Objectives/Tasks:</b> [How will we answer the question(s)? What actions do we need to take?]
	<b>Information/Data to Collect:</b> [How will we know the answer to the question(s)?]
	<b>Assumptions:</b> [Try to capture implicit ideas about the context for asking/answering the question(s).]
	<b>Envisioned Outcomes:</b> [How do we plan to use the answer(s) to change LORS' practices? How and to whom will we communicate the findings?]
<b>Roles and Responsibilities</b>	[Who are other team members beyond the project leader (if any)? Who will perform what tasks or actions? Include team members, all of LORS, and beyond (if applicable).]

<b>Key Partners</b>	[Who will LORS team members collaborate with in ULLS, on the UNM campus, and/or beyond (if applicable).]
<b>Resources Needed</b>	[Include budget information here if there are costs associated with this project. However, also include any non-monetary resources required to effectively complete this project. Where/how might you need help with this project?]
<b>File Management</b>	[Where will you store data, documentation, or other files related to this project? Provide a URL if possible.]

## **ATTACHMENT C: LORS ASSESSMENT PROJECT TEMPLATE**

### ***Project Title***

Please give your assessment project a title. If it is a long title, please also indicate if there is a shorter title for quick reference.

### ***Timeframe***

Month Year – Month Year

### ***Project Leader(s)***

Who has primary responsibility for implementing this project?

### ***Description***

Please provide a concise description of your assessment project. At a minimum, include the following information:

- Project goal: What questions does this project ask?
- Objectives/tasks: How will we answer the question(s)? What actions do we need to take?
- Information/data to collect: How will we know the answer to the question(s)?
- Assumptions: Try to capture implicit ideas about the context for asking/answering the question(s).
- Envisioned outcomes: How do we plan to use the answer(s) to change LORS' practices? How and to whom will we communicate the findings?

### ***Roles and Responsibilities***

Please list all LORS team members who will work on this project. For each team member (including the project leader), list the project tasks assigned to them. Use this section to think through who will perform which tasks or actions related to the project. If people other than the LORS project team will have critical, assigned responsibilities, include them, too.

### ***Key Partners***

Will your assessment project involve collaboration with partners outside of LORS? Please list any key partners in ULLS, the UNM campus, the community, or beyond. Also include a brief note about the way you envision collaborating with each partner.

### ***Resources Needed***

What do you need to complete your assessment project? If there are costs associated with your assessment project, please include a budget here. However, please include any non-monetary resources required as well. Where/how might you need help with this project?

### ***File Management***

Where will you store data, documentation, or other files related to this project? Provide a URL if possible.

## ATTACHMENT D: IMPACT MAP

### Key

- Y Yes, we believe there is an impact relationship between this institutional focus area and this library service, expertise, or resource -- and we might be able to identify an assessment project to demonstrate impact.
- Y- Yes, we believe there is an impact relationship, but it is unlikely we can design assessments to prove it.
- Y+ Yes, there is an impact, and we have evidence/data of the impact.
- Y++ Yes, there is impact, we have evidence/data, and we've communicated the impact to stakeholders.
- CB There "could be" an impact if we did something better or differently.
- N No, there is no impact.

<b>Library Services, Expertise, and Resources</b>	<b>Collection Development (Maintenance &amp; Purchasing)</b>	<b>Facilities, Library Classrooms</b>	<b>Instruction (course-integrated, credit courses, workshops)</b>	<b>Library Faculty Research &amp; Service</b>	<b>Outreach (communication, events, initiatives)</b>	<b>Reference (consultations, subject guides)</b>
<b>Institutional Focus Areas</b>						
<b>ULLS Strategic Priorities</b>						
Apply JEADI (Justice Equity, Accessibility, Diversity and Inclusion) Lens	Y	Y/CB	Y-	Y	Y	Y
Open Educational Resources	Y/CB	N	Y+	Y	Y	Y
Physical spaces	Y+	Y	N	N	N/CB	N
Advance digital scholarship	Y	Y	Y	Y	Y	Y
Campus and community partners	Y	Y+	Y++	Y	Y++	Y

Library Services, Expertise, and Resources	Collection Development (Maintenance & Purchasing)	Facilities, Library Classrooms	Instruction (course-integrated, credit courses, workshops)	Library Faculty Research & Service	Outreach (communication, events, initiatives)	Reference (consultations, subject guides)
<b>UNM 2040</b>						
<b>Advance New Mexico</b> <ul style="list-style-type: none"> <li>• Basic and applied research</li> <li>• Economic development of NM</li> <li>• Social justice and health equity</li> <li>• Align efforts with community stakeholders</li> <li>• Athletics, cultural events, arts</li> </ul>	Y+	Y	Y-	CB	CB	Y
<b>Student experience and Educational Innovation</b> <ul style="list-style-type: none"> <li>• Undergrad major pathways</li> <li>• Graduate student enrollment &amp; success</li> <li>• Co-curricular learning</li> <li>• Lifelong learners</li> <li>• Educational innovation</li> </ul>	Y-	N	Y/CB	Y+	CB	Y
<b>Inclusive Excellence</b> <ul style="list-style-type: none"> <li>• Accessibility and accommodation</li> <li>• Equity and inclusion commitments and infrastructure</li> <li>• Faculty and staff diversity, recruitment, retention, and equity</li> <li>• Assess climate and evolve cultural humility/literacy</li> <li>• Gateway course and branch campus students</li> <li>• Minoritized graduate students</li> </ul>	Y	Y/CB	Y-	Y-	Y	Y

Library Services, Expertise, and Resources	Collection Development (Maintenance & Purchasing)	Facilities, Library Classrooms	Instruction (course-integrated, credit courses, workshops)	Library Faculty Research & Service	Outreach (communication, events, initiatives)	Reference (consultations, subject guides)
<p>Sustainability</p> <ul style="list-style-type: none"> <li>• Campus work/living environment</li> <li>• Diversity and expand sources of revenue</li> <li>• Culture of philanthropy</li> <li>• Efficient budgeting and benchmarking</li> <li>• Vibrant and secure campus spaces</li> <li>• Assess and minimize environmental impact</li> </ul>	Y++	N	N	N	Y+	N
<p>One University</p> <ul style="list-style-type: none"> <li>• Trans-disciplinary research collaboration</li> <li>• Cross-campus cross-disciplinary living laboratory</li> <li>• Integrated admin systems and process improvement</li> <li>• Foundational infrastructure</li> <li>• Student and employee health and welfare</li> <li>• Track progress on 2040 goals</li> </ul>	Y+	N	Y	N	CB	N