

***Collaborative Assessment
Project – Final Report***
MCCLPHEI, Inc.

**Submitted by Stephen Spohn
Senior Consultant, Planning and Assessment
July 23, 2010**



LYRASIS Consulting
1438 West Peachtree Street NW
Suite 200
Atlanta, GA 30309
800.999.8558
www.lyrasis.org

Table of Contents

Introduction	2
Project Contributors	2
Part 1 – MCCLPHEI Assessment Priorities.....	2
Key to Code Numbers	2
Expenditures and Resource Allocations	3
Facilities and Visitors	3
Information Resources.....	3
Information Literacy	4
Services	4
Nursing.....	4
Other Areas of Consideration	4
Part 2 – Data Definitions and Calculations	5
Expenditures and Resource Allocations	5
Facilities and Visitors	7
Information Resources.....	8
Information Literacy	9
Services	10
Nursing.....	11
Part 3 – Data Crosswalks	12
IPEDS Translation.....	12
ACRL Translation	14
NEASC Translation	18
Part 4 – Findings and Recommendations	20
General Observations.....	20
Dashboards	20
Recommendations	22
Appendix: Sample Data Analysis	24

Introduction

In November 2009, MCCLPHEI, Inc., approached LYRASIS for advice concerning collaborative library assessment planning. Working closely with the MCCLPHEI, LYRASIS consultant Stephen Spohn facilitated a series of face-to-face and online discussions to determine a shared set of assessment priorities for MCCLPHEI institutions. This report outlines those shared priorities along with observations and recommendations for ongoing MCCLPHEI assessment activities.

MCCLPHEI used a Google Group to collaborate and share information in the initial stages of this project. Interested readers can learn more at: <http://groups.google.com/group/mcclphei-assessment>

Project Contributors

This project represents the collaborative effort of many MCCLPHEI institutions. The following individuals should be noted for significant time and energy devoted to the project.

- Linda Oldach, Chair, Data and Assessment Committee (MWCC)
- Robert Foley (FSC)
- Michael Somers (BSC)
- Rachel Lewellen (UMA)

Part 1 – MCCLPHEI Assessment Priorities

The following metrics were selected to assist MCCLPHEI and its member institutions as a beginning to collaborative assessment. It should be noted that there was a conscious effort to use data that is already collected so that the early focus of the project can be on the collaboration. The MCCLPHEI Assessment Committee should review, revise and expand this dashboard of comparative library metrics regularly to ensure that MCCLPHEI and its member institutions have data to demonstrate library impact and effectiveness.

Key to Code Numbers

No.	Explanation
D@#	Dashboard metrics begin with the letter D and are continuously numbered. The second letter refers to the area being measured (as described below).
R#	Data and metrics associated with expenditures and resource allocations.
V#	Data and metrics associated with facilities and visitors.
I#	Data and metrics associated with information resources.
L#	Data and metrics associated with information literacy.
S#	Data and metrics associated with services.
N	Data and metrics associated with nursing programs. There are a few stand-alone data points here: N1 and N2. The remainder display N as suffix to indicated a subset of the greater dashboard metric.

Expenditures and Resource Allocations

Metrics in this area will assist library directors to monitor resource allocations among and within MCCLPHEI institution libraries.

No.	Metric
DR1	Percentage of expenditures on information resources, staffing and other
DR2	Total expenditures per FTE student
DR3	Total information resources expenditures per FTE student
DR4	Percentage of expenditures on print books and journals, tangible media and Web-accessible information resources
DR5	FTE students per FTE librarian
DR6	FTE students per FTE total staff
DR7	Percentage of librarians that are full time

Facilities and Visitors

Metrics in this area will assist library directors to monitor trends in overall library use.

No.	Metric
DV8	FTE students per library seats
DV9	FTE students per computer workstation
DV10	Total service hours in a typical week
DV11	Gate count in a typical week per FTE student
DV12	Total Web site visits per FTE student

Information Resources

Metrics in this area will assist library directors to monitor and assess the use of information resources and the effectiveness of collection development activities.

DI13	Average collection age
DI14	New book circulation ratio
DI15	Total circulation per FTE student
DI16	Average cost per use of electronic resources
DI17	Percentage of expenditures by discipline ¹

¹ MCCLPHEI may wish to use a tool such as the OCLC Conspectus as a means to analyze collections by discipline.

Information Literacy

Metrics in this area will assist library directors to monitor the penetration and effectiveness of information literacy instruction programs and to identify best practices at other institution libraries.

DL18	Percentage of course sections receiving instruction
DL19	Percentage of attendance at workshops per FTE student

Services

Metrics in this area will assist library directors to monitor the use and effectiveness of key library services and to identify best practices at other institution libraries.

DS20	Reference transactions in a typical week per FTE student
DS21	Percentage of courses using reserves
DS22	Percentage and volume of ILL lending and borrowing
DS23	Number and percentage of distance learning courses with library participation

Nursing

Nursing was identified as a pilot program to compare library resource commitments to an academic program.

DN2	Percentage of total information resources expenditures
DR3- N3	Nursing information resources expenditures per FTE nursing student
DI13- N4	Average collection age
DI14- N5	New book circulation
DI15- N6	Total circulation per FTE student
DI16- N7	Average cost per use of electronic resources

Other Areas of Consideration

- Expenditures: Off site storage
- Expenditures: ILS – currently captured in network fees
- Expenditures: Printing, photocopying
- Expenditures: Interlibrary loan systems and networks
- Expenditures/Information Resources: Analysis by OCLC Conspectus
- Information resources: Ebook “circulation”
- Information resources: Full text downloads

Part 2 – Data Definitions and Calculations

In this section, the individual data points are displayed above the dashboard metrics along with the calculations necessary (where possible).

Expenditures and Resource Allocations

It is advisable for each MCCLPHEI institution library to collaborate with their home institution business office to ensure that the general ledger will facilitate reporting in these areas.

No.	Data element	Data definition/instructions (as needed)
R1	Expenditures: total ²	Include all expenditures including staff salaries, wages and fringe benefits. ³
R2	Expenditures: print books	Exclude service charges for shelf-ready processing.
R3	Expenditures: electronic books	Exclude service charges for records. Include renewal fees.
R4	Expenditures: audiovisual media (physical media)	Exclude service charges for shelf-ready processing. Include all visual and auditory media including movies, audiobooks, etc.
R5	Expenditures: print serials	Exclude fees for subscription services.
R6	Expenditures: electronic serials	Exclude service charges for records. Include only publisher provided serials and serials packages here, e.g. Elsevier Science Direct.
R7	Expenditures: aggregated databases	Exclude service charges for records. Includes EBSCO, Gale and other aggregator products.
R8	Expenditures: electronic reference	Include tools such as Britannica Online, etc.
R9	Expenditures: other information	Include cartographic materials, manuscripts, etc.
R10	Expenditures: copyright fees	Include all fees paid for copyright clearance services.
R11	Expenditures: document delivery	Exclude any costs for “intra” campus delivery.
R12	Expenditures: preservation	Include all costs for supplies, services and equipment.
R13	Expenditures: bibliographic tools	Include all fees for networks and utilities that support information discovery, access and delivery including ILS, discovery, journal A-Z, federated search, and ILL/document delivery.
R14	Expenditures: technology	Include all fees for hardware and software not included above.
R15	Expenditures: professional salaries and wages	
R16	Expenditures: staff salaries and wages	
R17	Expenditures: student salaries and wages	

² Report all expenditures as whole numbers.

³ Do not include any expenditures that can be attributed to capital funding for new buildings and building renovations.

No.	Data element	Data definition/instructions (as needed)
R18	Expenditures: fringe benefits	
R19	Expenditures: fringe benefits – Y/N	Yes, if fringe benefits are paid from the library's budget.
R20	Number of FT Librarians	
R21	FTE ⁴ Librarians	(See footnotes.)
R22	FTE Other Professionals	Other professionals may include grants officers or business officers with MBAs or archivists who are historians, etc.
R23	FTE Other Staff	(See footnotes.)
R24	FTE Student Workers	(See footnotes.)
R25	FTE Students	

No.	Metric	Calculation
DR1	Percentage of expenditures on information resources, staffing and other	=SUM (R2 : R13) / R1 =SUM (R15 : R18) / R1 =(R1 – SUM (R2 : R13) – SUM (R15 : R18)) / R1
DR2	Total expenditures per FTE student	=R1 / R25
DR3	Total information resources expenditures per FTE student	=SUM (R2 : R13) / R25
DR4	Percentage of expenditures on print books and journals, tangible media and Web-accessible information resources	=(R2 + R5) / SUM (R2 : R8) =R4 / SUM (R2 : R8) =(R3 + R6 + R7 + R8) / SUM (R2 : R8)
DR5	FTE students per FTE librarian	=R25 / R21
DR6	FTE students per FTE total staff	=R25 / SUM (R21 : R24)
DR7	Percentage of full time librarians	=R20 / R21

⁴ To calculate PT FTE, take total hours worked and divide by the number of PT staff in each category. Report FTE with two decimal places.

Facilities and Visitors

No.	Data element	Data definition/instructions (as needed)
V1	Number of library branches	A library branch has staffing, defined service hours and a defined collection. Do not include academic departmental collections that are not under library purview.
V2	Number of library seats	Do not include classrooms that are not generally available.
V3	Number of public computer workstations	Do not include library catalog only workstations or similar workstations that are of limited use. Do include workstations that contain specialized software in addition to software necessary to access library resources via the Internet.
V4	Weekly service hours	Include the cumulative hours for all branch locations in a typical week. ⁵
V5	Weekly gate count	Include the cumulative gate count for all branch locations in a typical week.
V6	Web site visits	Include the total number of visits to the library Web site. One visit may include several page views and many hits.

No.	Metric	Calculation
DV8	FTE students per library seats	=R25 / V2
DV9	FTE students per computer workstation	=R25 / V3
DV10	Total service hours in a typical week	=V4
DV11	Gate count in a typical week per FTE student	=V5 / R25
DV12	Total Web site visits per FTE student	=V6 / R25

⁵ This is a marked deviation from the IPEDS data definition that was deemed important by MCCLPHEI members to assist with the analysis of resource allocations.

Information Resources

No.	Data element	Data definition/instructions (as needed)
I1	Average collection age	ILS report
I2	New book circulation	ILS report
I3	New books	Number of books purchased.
I4	General circulation	
I5	Reserves circulation	
I6	Expenditures: database packages	Include only costs for the vendor packages agreed upon by the MCCLPHEI member institutions.
I7	Usage: database packages	Include COUNTER-compliant figure for total full-text downloads.
I8	Expenditures: [individual discipline]	All items purchased including serials and databases for each discipline.

No.	Metric	Calculation
DI13	Average collection age	=I1
DI14	New book circulation ratio	=I3 / I2
DI15	Total circulation per FTE student	=I4 / R25
DI16	Average cost per use of electronic resources	=I6 / I7
DI17	Percentage of expenditures by discipline	To be determined.

Information Literacy

No.	Data element	Data definition/instructions (as needed)
L1	Number of presentations	
L2	Number of attendees	
L3	Number of course sections	Number of course sections available for registration for the total year.

No.	Metric	Calculation
DL18	Percentage of course sections receiving instruction	=L1 / L3
DL19	Percentage of attendance at workshops per FTE student	=L2 / R25

Services

No.	Data element	Data definition/instructions (as needed)
S1	Weekly reference transactions	
S2	Number of course sections with items on reserves	
S3	ILL Lending: returnables	
S4	ILL Lending: nonreturnables	
S5	ILL Borrowing: returnables	
S6	ILL Borrowing: nonreturnables	
S7	Document delivery	
S8	Number of distance learning courses in learning management system	
S9	Number of distance courses in learning management system with library involvement	

No.	Metric	Calculation
DS20	Reference transactions in a typical week per FTE student	=S1 / R25
DS21	Percentage of courses using reserves	=S2 / L3
DS22	Percentage and volume of ILL lending and borrowing	=(S3 + S4) / SUM (S3 : S6) =(S5 + S6) / SUM (S3 : S6)
DS23	Number and percentage of distance learning courses with library participation	=S9 / S8

Nursing

MCCLPHEI will identify the information resources in this area using two criteria:

- 1) Existence of a nursing program at the school
- 2) Call number ranges identified as nursing information resources yet to be defined.

No.	Data element	Data definition/instructions (as needed)
N1	Existence of nursing program (Y/N)	
N2	Expenditures on nursing program	This should be considered as MCCLPHEI refines data element I8.
N3	Circulation – Nursing	ILS report
N4	Average collection age – Nursing	ILS report
N5	New book circulation – Nursing	ILS report
N6	Information literacy presentations – Nursing	
N7	Information literacy attendance - Nursing	
N8	FTE nursing students	

No.	Metric	Calculation
DI17-N	Percentage of total information resources expenditures	=N2 / SUM (R2 : R13)
DR3-N	Nursing information resources expenditures per FTE nursing student	=N2 / N8
DI13-N	Average collection age - nursing	=N4
DI14-N	New book circulation - nursing	=N5 / N8
DI15-N	Total circulation per FTE student - nursing	=N3 / N6
DL19-N	Percentage of attendance at workshops per FTE student	=N7 / N8

Part 3 – Data Crosswalks

IPEDS Translation

Use this table to understand the relationships between data that already exists, data that is currently not included in the new MCCLPHEI metrics, and to consider new methods for data collection. It would be advisable for MCCLPHEI to consider adding the remaining IPEDS metrics and any other metrics required for library reports and generating those reports centrally.

No.	Brief Description	Calculation
100	Number of Branch and Independent Libraries	=V1
200	Number of FTE Librarians	=R21
201	Number of FTE Other Professionals	=R22
202a	Number of FTE All Professionals	=R21 + R22
202b	Total Professional Salaries	=R15
203a	Number of FTE Other Staff	=R23
203b	Total Other Staff Salaries	=R16
204a	Number of FTE Student Workers	=R24
204b	Total Student Worker Salaries	=R17
205a	Total FTE Staff	=SUM (R21 : R24)
205b	Total Salaries	=SUM (R15 : R17)
206	Employee Fringe in Library Budget	=R19
207	Employee Fringe Paid from Library Budget	=IF (R19 = 'Y', R18, 0)
300	EXP Books, Backfiles, Etc.	=SUM (R2 : R4)
301	EXP Electronic	=R3
302	EXP AV	=R4
303	EXP Serials	=R5 + R6
304	EXP Electronic Serials	=R6
305	EXP Document Delivery	=R11
306	EXP Preservation	=R12
307	EXP Other Information	=R9
308	EXP Computer	=R14
309	EXP Bibliographic Utilities	=R13
310	EXP All Other	=R1 - SUM (R2 : R18)
311	EXP ALL	=R1
400a	ADDS – Book Volumes	=I3
400b	HELD – Book Volumes	
401a	ADDS – Ebooks	

No.	Brief Description	Calculation
401b	HELD - Ebooks	
402a	ADDS - MFORM	
402b	HELD - MFORM	
403a	ADDS - AV	
403b	HELD - AV	
404a	ADDS - Current Subscriptions	
404b	HELD - Current Subscriptions	
405a	ADDS - Aggregated Databases	
405b	HELD - Aggregated Databases	
500	SENT - Returnables	=S3
501	SENT - Non-returnables	=S4
502	SENT - Total	=S3 + S4
503	RCVD - Returnables	=S5
504	RCVD - Non-returnables	=S6
505	RCVD - Commercial Document Delivery	=S7
506	RCVD - TOTAL	=SUM (S5:S7)
507	General Circulation	=I4
508	Reserves Circulation	=I5
509	Presentations	=L1
510	Attendance	=L2
600	Hours	
601	Gate Count	=V5
602	Reference	=S1

ACRL Translation

Use this table to understand the relationships between data that already exists, data that is currently not included in the new MCCLPHEI metrics, and to consider new methods for data collection. I strongly recommend that MCCLPHEI evaluate its involvement in this survey given the level of detail collected and work involved.

No.	Brief Description	Calculation
1.a.	Volumes held last FY	
1.b.i	Volumes added	
1.b.ii	Volumes withdrawn	
1.b	Volumes - adds minus withdraws	
1.	Volumes held this FY	
2.	Titles held	
3.	Monographs purchased	=I3
4.a.	Volumes - physical	
4.b.	Volumes - bibliographic	
5.a.i.	Electronic serials (deduplicated) currently purchased	
5.a.ii.	Print serials (and other formats) currently purchased	
5.a.	Total serials currently purchased	
5.b.i.	Consortial serials received (not purchased)	
5.b.ii.	Freely accessible serials (not purchased)	
5.b.iii.	Gifts serials	
5.b.iv.	Government documents serials (not purchased)	
5.b.	Total serials (not purchased)	
6.	Government documents included in serials count (Y/N)	
7.	Microform units held	
8.	Government documents held (not included elsewhere)	
9.	Computer files held	
10.	Manuscripts and archives held	
11.	Cartographic materials held	
12.	Graphic materials held	
13.	Audio materials held	
14.	Film and video materials held	
15.	Using Canadian dollars? (Y/N)	
16.a.	Expenditures - monographs	=R2 + R3

No.	Brief Description	Calculation
16.b.	Expenditures - serials	=R5 + R6
16.c.	Expenditures - other materials	=R4
16.d.	Expenditures - misc materials	=SUM (R7 : R13)
16.	Expenditures - all materials	=SUM (R2 : R13)
17.	Expenditures - contract binding	
18.a.	Expenditures - professional salaries and wages	=R15
18.b.	Expenditures - staff salaries and wages	=R16
18.c.	Expenditures - student salaries and wages	=R17
18.	Expenditures - all salaries and wages	=SUM (R15 : R17)
19.	Fringe benefits included? (Y/N)	= "N"
20.	Expenditures - other operating	
21.	Expenditures - total	=R1
22.	Expenditures - one-time electronic resources	
23.	Expenditures - ongoing electronic resources	
24.a.	Expenditures - bibliographic utilities, networks and consortia (internal funds)	
24.b.	Expenditures - bibliographic utilities, networks and consortia (external funds)	
24.	Expenditures - bibliographic utilities, networks and consortia (all funds)	=R13
25.	Expenditures - computer hardware and software	=R14
26.	Expenditures - document delivery/ILL	=R10 + R11
27.a.	FTE - Professionals	=R21 + R22
27.b.	FTE - Staff	=R23
27.c.	FTE - Student workers	=R24
27.	Total FTE Library Staff	=SUM (R21 : R24)
28.	Number of staffed service points	
29.	Number of weekly public service hours	
30.	Number of presentations	=L1
30.a.	Based on sampling?	
31.	Number of participants	=L2
31.a.	Based on sampling?	
32.	Number of reference transactions	
32.a.	Based on sampling?	
33.	Circulation - initial (excluding reserves)	

No.	Brief Description	Calculation
34.	Circulation - initial and renewals (excluding reserves)	=I4
35.	ILL - Filled lending requests	=S3 + S4
36.	ILL - Filled borrowing requests	=S5 + S6
37.	Ph.D.s awarded	
38.	Number of fields in which a Ph.D. can be awarded	
39.	Number of full time instructional faculty	
40.	Enrollment - FTE total	=R25
41.	Enrollment - FTE part-time	
42.	Enrollment - FTE full-time graduate	
43.	Enrollment - FTE part-time graduate	
44.	Holdings - electronic books	
45.	Expenditures - electronic books	=R3
46.	Canadian dollars? (Y/N)	
47.	Virtual reference transactions	
48.	Federated searching (Y/N)	
49.	Number of sessions (logins) to databases or services	
49.a.	Number of resources included above	
50.	Number of searches in databases or services	
50.a.	Number of resources included above	
51.	Number of full text article downloads	=I7
51.a.	Number of resources included above	
52.a.	Number of virtual visits to library web site	
52.b.	Number of virtual visits to library catalog	
52.c.	Excludes visits from inside library? (Y/N)	
53.a.	Number of digital collections	
53.b.	Size of digital collections (in gigabytes)	
53.c.	Number of items in digital collections	
54.a.	Number of digital collections items accessed	
54.b.	Number of digital collections queries	
55.a.	Expenditures - Digital collections personnel	
55.b.	Expenditures - digital collections equipment, software, contracted services	
56.	Holdings - volumes held collectively	

NEASC Translation

Use this table to understand the relationships between data that already exists, data that is currently not included in the new MCCLPHEI metrics, and to consider new methods for data collection. I strongly recommend that MCCLPHEI engage NEASC in dialogue to revise and/or align metrics between MCCLPHEI assessment priorities and NEASC Data First data elements.

No.	Brief Description	Calculation
	Expenditures per FTE student – materials	=SUM (R2 : R13) / R25
	Expenditures per FTE student – salaries and wages	=SUM (R15 : R18) / R25
	Expenditures per FTE student – other operating	=(R1 – SUM (R2 : R13, R15 : R18)) / R25
	Collections – total print volumes	
	Collections – electronic books	
	Collections – print/microform serial subscriptions	
	Collections – full text electronic journals	
	Collections – microforms	
	Collections – total media materials	
	Personnel – librarians – main campus	
	Personnel – librarians – branch campuses	
	Personnel – other – main campus	
	Personnel – other – branch campuses	
	Instruction – total sessions – main campus	
	Instruction – total attendees – main campus	
	Instruction – total sessions – branch campuses	
	Instruction – total attendees – branch campuses	
	Reference – in person questions	
	Reference – virtual questions	
	Electronic reserves – courses supported	
	Electronic reserves – items	
	Circulation – total per FTE student	=I4 / R25
	COUNTER – Total full text article requests	=I7
	Student borrowing through consortia or contracts	
	Hours of operation – weekly – main campus	
	Hours of operation – weekly – branch campuses	
	Gate counts per year – main campus	
	Gate counts per year – branch campuses	

Part 4 – Findings and Recommendations

The following brief observations and recommendations are based upon meeting discussions, research and a review of the past several years of MCCLPHEI statistics. They are numbered for convenience during further discussions.

General Observations

There are a number of factors that currently have a negative influence on overall data integrity to support collaborative assessment:

- IPEDS and NEASC data definitions leave room for interpretation. Without consistent, centralized direction, MCCLPHEI institutions have reported statistics that are inconsistent with other institutions and sometimes across reporting years.
- All surveys require individual libraries to do calculations introducing many opportunities for human error.
- There is tremendous disparity between the three statistical surveys and the data they collect which leads to an increased burden on MCCLPHEI libraries.
- Data collection processes among MCCLPHEI institutions vary greatly. This paired with statements in survey data definitions such as “typical week” suggests even greater inconsistencies.
- Data is collected centrally infrequently. This is not sufficient for providing timely and actionable information to support decision-making at the institution level.
- Each institution uses its own methods and schedules to collect, report and analyze data internally. Anticipated differences among forms and other data collection methods would also contribute to inconsistencies with data.
- Data is collected centrally by one of the MCCLPHEI institution library directors. It is questionable whether this activity and the completion of MCCLPHEI’s assessment goals are appropriate work for the knowledge, experience, capabilities and salary of a library director.
- Data analysis for statistical surveys and reaccreditation activities is duplicated among MCCLPHEI institutions.

Dashboards

In the original scope of this project, the LYRASIS consultant was tasked to provide general recommendations for MCCLPHEI to explore dashboards. That scope has since evolved to product research on business intelligence dashboards that would best suit MCCLPHEI’s needs. Research also included inquiries to each institution’s research and admissions offices to determine what products may already be in place. We chose to explore three products with the understanding that MCCLPHEI currently lacks the working knowledge to formally assess their capabilities at present. Those products are:

- **iDashboards**
<http://www.idashboards.com/edu>
Commercial products with both desktop and Web-scale solutions.
- **Pentaho**
<http://www.pentaho.com>
Open source and SAAS products with local hosting options.
- **Tableau**
<http://www.tableausoftware.com>
Commercial products with both desktop and Web-scale solutions.

It seems advisable for MCCLPHEI to initially pursue the desktop products offered by Tableau. A number of institutions' departments are already using or considering Tableau, and the associated costs are negligible. Migration to a more robust and costly Web-scale product should be considered in four or five years once this program of collaborative assessment has been tested and refined and has reached a level of complexity that warrants the costs.

If MCCLPHEI decides to pursue Tableau, the following items should be considered:

- Further research is needed to determine data formats for easy ingestion into Tableau (and presumably other business intelligence dashboards). This has implications for data collection activities that will facilitate easy data transfer.
- Desktop software to *create* dashboards is the only vendor cost. MCCLPHEI and its member institutions will need to determine who needs this software and establish a collaborative relationship among those parties.
- MCCLPHEI should set aside Web space to host data collections and dashboards for easy viewing. Tableau has the capability to create Web versions of dashboards as well as more complex dashboards that can be downloaded and viewed using a free viewer. In the initial stages, a MCCLPHEI Google or Yahoo group space would be an acceptable option. However, MCCLPHEI should create a publicly accessible place to host dashboards (and possibly data) that it intends to share more broadly.

Recommendations

The following recommendations outline next steps for MCCLPHEI to implement its collaborative assessment program.

- **Metrics**

1. Make necessary revisions to the metrics outlined in this proposal before implementation.
2. Create a mechanism to capture ideas for new metrics. A page in the MCCLPHEI Yahoo Group may be sufficient.
3. Set a schedule for project review to (1) determine the usefulness of current metrics and (2) to review new ideas for metrics.
4. Consider whether it would be best for MCCLPHEI to collect all data points for all *selected* surveys in addition to data needed for MCCLPHEI metrics to further centralize data reporting activities for MCCLPHEI libraries.

- **Standardize Data Collection**

5. Create standard forms to collect and report data for all institutions.
6. Establish standard times and methods for sampling.
7. Assist libraries to align financial accounting to facilitate data collection.
8. Revises crosswalks between MCCLPHEI data points and statistical surveys.

- **Statistical Survey Participation**

9. Evaluate MCCLPHEI institution commitment to participate in ACRL survey.
10. Work with NEASC to refine Data First forms to best capture meaningful data on libraries and adjust assessment priorities and data collection methods accordingly.

- **Centralize Analysis and Reporting**

11. Perform all analysis and calculations centrally.
12. Derive IPEDS and other reports from data collected centrally.
13. Create dashboards and other data views centrally to inform library decision-making.
14. Review dashboard metrics annually to ensure that data collected is meaningful and accurate.

- **Reaccreditation Support**

15. Create a standard report that all MCCLPHEI libraries can use to supplement local assessment information.

- **Dashboard**

16. Purchase a small number of copies of the Tableau dashboard creator software and begin to experiment with dashboards.
17. Establish Web space to warehouse data, reports and dashboards accessible to MCCLPHEI library directors and their designees.

18. In two years, reevaluate dashboard needs and dashboard tools.

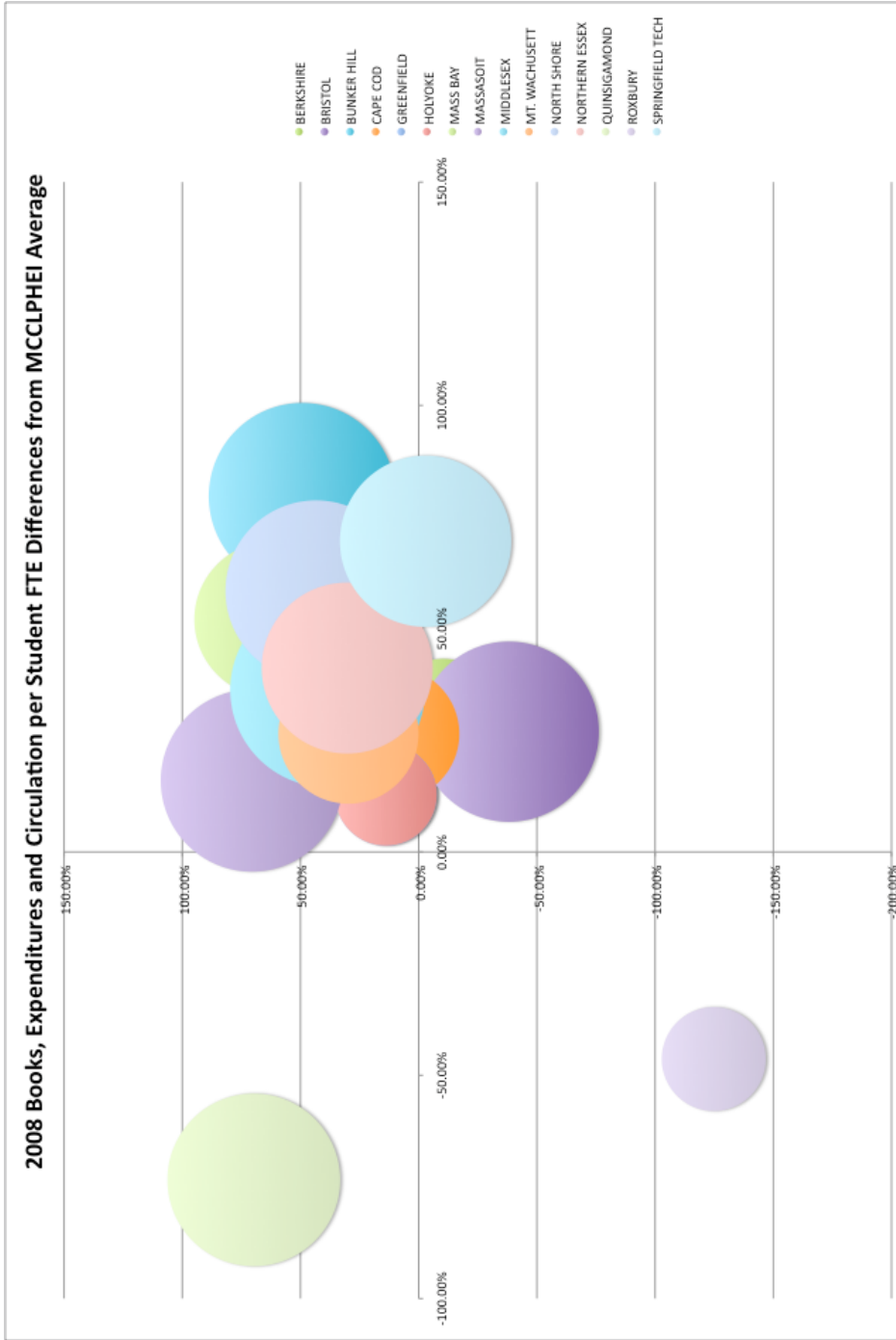
- **Assessment Coordination**

19. Consider the creation of an assessment coordinator librarian position to fulfill the prior recommendations as well as to build capacity to respond to other related needs and requests. (MCCLPHEI may wish to consider this recommendation in the broader scheme of its strategic plan. Though it is outside the scope of this project, MCCLPHEI may wish to consider a full time staff member to help it realize the strong goals in its strategic plan.)

Appendix: Sample Data Analysis

The following is a brief illustration of currently available data and visualization methods that may prove useful as MCCLPHEI continues to explore dashboard and data repository tools. The data presented below is not for comparative purposes, but rather an illustration of the need for central direction and coordination for assessment efforts.

Institution	Institution Type	Information Resources Expenditures per FTE Student: 2006 to 2008 Change	Circulation per FTE Student: 2006 to 2008 Change
BRIDGEWATER	College	10.69%	-17.57%
FITCHBURG	College	25.92%	-9.83%
FRAMINGHAM	College	83.77%	-24.46%
MASS. COL ART & DESIGN	College	(missing data)	(missing data)
MASS. COL LIB ART	College	(missing data)	-7.48%
MASS. MARITIME	College	(missing data)	(missing data)
SALEM	College	37.51%	-41.42%
WESTFIELD	College	30.92%	-6.64%
WORCESTER	College	55.02%	-15.52%
BERKSHIRE	Community College	-18.60%	-1.55%
BRISTOL	Community College	34.63%	-11.85%
BUNKER HILL	Community College	7.01%	16.58%
CAPE COD	Community College	-0.27%	-1.84%
GREENFIELD	Community College	16.93%	-12.88%
HOLYOKE	Community College	80.94%	16.26%
MASS BAY	Community College	12.15%	65.08%
MASSASOIT	Community College	39.52%	-2.35%
MIDDLESEX	Community College	-10.04%	-4.45%
MT. WACHUSETT	Community College	-4.77%	-18.23%
NORTH SHORE	Community College	-7.64%	3.56%
NORTHERN ESSEX	Community College	12.02%	23.43%
QUINSIGAMOND	Community College	-12.85%	-30.44%
ROXBURY	Community College	21.78%	48.91%
SPRINGFIELD TECH	Community College	-2.17%	7.02%
U MASS. AMHERST	University	(missing data)	(missing data)
U MASS. BOSTON	University	(missing data)	(missing data)
U MASS. DARTMOUTH	University	(missing data)	(missing data)
U MASS. LOWELL	University	(missing data)	(missing data)
U MASS. MEDICAL	University	(missing data)	(missing data)



This chart illustrates the percentage difference in circulation/FTE student (Y axis), information resources expenditures/FTE student (X axis) and FTE student (bubble radius) from the MCCLPHEI average values (0, 0) for fiscal year 2008. (This chart and other data have been submitted to MCCLPHEI as separate Excel documents and other files.)