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# Developing an Academic Library Assessment Plan: A Case Study

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**Introduction**

Since the turn of the millennium, academic libraries have increasingly sought to weave assessment into their planning and decision-making processes, motivated by heightened accountability, financial constraints, and rising customer expectations (Smith, 2015). With assessment activities growing more complex and demanding additional resources, many have recognized the need for academic libraries to plan their assessment programs. Some libraries have elected to share their assessment plans and programs publicly, whether in the form of published literature, conference presentations, or openly accessible web resources. Perhaps not surprisingly, many of the best documented examples of assessment come from research libraries, where resources are most abundant. By contrast, seemingly few contributions to the literature or the conference circuit have emphasized planning or executing library assessment in settings where teaching takes precedence over research. This article aims to address the scarcity of such information by documenting one teaching university library's experience and relating local findings to relevant literature.

The subject of the case study is the Jerry Falwell Library at Liberty University, which is located in Lynchburg, Virginia, USA. Beginning in late August 2013 and continuing for 13 months, the library involved a substantial number of its librarians and staff in the development of a plan to guide its future assessment operations. The authors of the case study were members of the Library Assessment Task Force that was charged with carrying out the planning process. Producing the plan required broad engagement and led to a substantial amount of organizational learning. Ultimately, the process advanced the library's culture of assessment.

**Context**

Founded in 1971, Liberty University is an evangelical Christian institution with 14,000

resident and 69,000 online students. The university offers a broad array of graduate programs, but undergraduate students are in the majority both on campus and online. The institution takes pride in placing greater emphasis on quality teaching than on faculty research output. Like many universities, Liberty University's management climate has increasingly become data-driven.

The Jerry Falwell Library is the main library at Liberty University. It has persistently scaled up its operations to meet the demands of an ever-changing and rapidly growing institution. A decade ago, assessment activities consisted largely of departmental reports, benchmarking key metrics against other libraries, and occasional surveys. The assessment program has grown to incorporate additional elements: national surveys such as LibQUAL+®, focus groups, comment cards, website usability studies, a business intelligence utility attached to the integrated library system, data from numerous other systems, and more. Two employees currently have assessment as a significant component of their job roles, but responsibility for assessment is gradually spreading across the library organization.

The past few years have brought a flurry of activity within the library. Since 2012, the university has actively prepared for a major accreditation review, influencing the library's attention to assessment. A new library dean took office in December 2012 and promptly launched a strategic planning process that drew insights from LibQUAL+® data. Years of planning for a new library building culminated with the opening of the Jerry Falwell Library in January 2014.

Leading up to the fall of 2013, the library had achieved some notable successes by combining analysis of assessment data with a willingness to innovate (Smith, 2011; Crane and Snyder, 2013). However, the future of the library's assessment efforts was uncertain. More than five years had passed since the library had drafted a formal assessment plan, and it was unclear

how the limited number of people who were focused on assessment could leverage the opportunities associated with data-driven management. This set of circumstances led the dean to conceive of an assessment planning process.

## Methodology

As stated earlier, the authors were firsthand participants in the process of developing the library's assessment plan. The decision to document the library's experience via a case study came late in the process, with the aim of yielding insight into three questions:

- How can an academic library effectively plan its assessment program?
- How might the attributes of the library and its sponsoring institution influence the planning process?
- How might the process of developing an assessment plan relate to building a culture of assessment within the library?

Case study research is employed in a number of disciplines, though many case studies in the library literature are not labeled as such. The authors' roles as participant observers led naturally to the use of qualitative methods. Rather than simply relying on personal perceptions and memories, the authors collected and analyzed documents generated during the planning process: meeting agendas and notes, education and training materials, a milestone log, and successively refined versions of the assessment plan document. Additionally, the authors administered an anonymous survey to planning participants. The instrument consisted of five open-ended questions that were designed to elicit participants' perspectives without suggesting desirable responses:

1. Describe your perspective of the process that led to the development of the library's assessment plan. What worked well, and how might the process have been improved?

2. What have you learned about assessment in the past year?

3. How do you expect your involvement in library assessment to change in the coming year?

4. What opportunities and challenges lie ahead as the library executes its assessment program in 2014-15 and beyond?

5. What role does assessment play in the life of the Jerry Falwell Library?

Thirty-seven employees were invited to take the survey and 17 (46%) responded, generating narratives totaling nearly 4,000 total words. The researchers collaborated in coding all item responses so as to enhance the objectivity of their analysis. The assignment of codes consistently involved at least two researchers. Most commonly, an individual researcher assigned codes on a preliminary basis, and then a second researcher reviewed the initial coder's findings. As necessary, members of the research team convened to discuss and resolve differences of interpretation.

Following the example set by a case study of workplace stress in a library (Farler and Broady-Preston, 2012), this study's literature review is integrated into the thematic analysis section. A case study of assessment planning at four university libraries (Tatarka *et al.*, 2010) provided an important precursor to this research, though this study differs in two key respects. First, it focuses on a single library, allowing for the examination of more detail. Second, following Jencik (2011) and Yin (2012), this study aims to relate the library's experience to previously published research and theory.

**Narrative of the planning process**

The Jerry Falwell Library's assessment planning process can best be described as a sequence of five stages:

- Vision (August-October 2013)

- Exploration (October-December 2013)

- Dormancy (January-March 2014)

- Resurgence (April-July 2014)

- Refinement (August-September 2014)

This section presents highlights of each stage. The authors have elsewhere offered a more comprehensive account of the process.[1]

The goal of producing the library's next-generation assessment plan originated with the library's dean in late August 2013. The dean's vision emerged at a time when the library organization faced at least three key challenges: the construction of a new building, an institution-wide strategic planning process, and preparations for a major accreditation review. A new body, the Library Assessment Task Force (LATF), was constituted to develop the plan. The new plan would support the development of a culture of assessment within the library. Furthermore, it would provide for continued evaluation of operational efficiency and customer satisfaction while purposefully reaching beyond these metrics to demonstrate the library's impact on its stakeholders.

From the inception of the planning process, it was understood that the LATF would not seek to reinvent library assessment. Through the fall of 2013, the group's six regular members took online training, acquainted themselves with the literature, and shared what they had learned. Resources that influenced the LATF at this stage included those by Dugan and Hernon (2002), Self (2003), Lakos and Phipps (2004), Applegate (2009), and Smith (2015). In the final months of 2013 the LATF undertook a critical project: compiling a list of 112 measurement and evaluation activities that were candidates for inclusion in the assessment plan. The list included

assessments related to external reporting requirements, the library's strategic plan, and the operational priorities of the library's departments.

Development of the assessment plan slowed significantly in the early months of 2014 due to the busyness of opening the new building and preparing the library's annual budget proposal. This period of dormancy provided an opportunity for the LATF to consider the scope of the assessment program and the extent to which responsibility for its implementation would remain centralized. Group members reflected on the choice between focusing on a limited list of key metrics (e.g., in the style of the balanced scorecard) and developing an assessment program that would encompass the breadth of the library's users, services, and resources. A relatively broad scope would entail a greater degree of organizational change, with employees across various units assuming some assessment responsibilities.

The assessment planning process reemerged as a priority in April 2014, eventually leading to two important decisions. First, the LATF would become a permanent body known as the Library Assessment Committee. (The body's membership remained constant, so this article consistently refers to the group as the LATF.) Second, a significant number of library employees would contribute directly to assessment planning through assignment to an affinity group. Each affinity group, representing a cohesive span of library operations, would be tasked with proposing the assessment plan elements that should apply to their respective areas.

Four affinity groups were constituted in June 2014, with each one being assigned two LATF members as liaisons. Excluding LATF liaisons, the affinity groups comprised 22 employees. Each group was commissioned to complete an assessment plan template for its respective areas of operation. The assessment plan template prompted the groups to identify the source and nature of the data; the rationale for using this data for assessment; the names of

persons or groups responsible for data collection and analysis; the expected output; and the frequency of the assessment effort.[2]

By the end of July 2014, a composite assessment plan document had been compiled, tentatively calling for the execution of 80 data collection and/or analysis efforts during 2014-2015. However, eleven of these were tagged as lacking sufficient consensus and/or detail, and thus were subject to further review. In August 2014 LATF members worked independently and in conjunction with various stakeholders to examine the suitability of each plan entry and resolve any concerns. Additionally, at the dean's direction, affinity group chairs were directed to clarify the connections between assessment plan components and strategic plan entries.

As the assessment plan took shape over the course of a year, contributors wrestled with how to enact the dean's vision that the plan demonstrate the library's impact on its customers. In the final months of the process, planning participants came to conclude that demonstrating the library's value was a function of both marketing and assessment. Accordingly, the plan was edited to provide for periodic publication of vignettes that would document the library's impact. Once this matter was resolved at the end of September 2014, the assessment plan for 2014-2015 was in final form, outlining 76 distinct assessment efforts to be carried out by more than 30 library employees.

## Thematic analysis of the planning process

This section evaluates the planning process and the resulting organizational outcomes. Discussion is divided into three segments that correspond to the three research questions stated previously. Analysis relies heavily on the perceptions that process participants articulated via the survey data. In an effort to enhance the benefit to readers from other libraries, findings make appropriate references to research and theory concerning library assessment.

*The context of the planning process*

Academic library planning processes take place in the context of organizational and institutional factors. Many factors may motivate academic libraries to engage in assessment. Wright and White (2007) distinguished between conducting assessment to meet external expectations and doing so to address the service needs of library users. Lakos (2007) discussed evidence-based decision-making as a central driver for library assessment. Applegate (2009) identified five foundations for assessment planning in an academic library: external reporting requirements, strategic planning, departmental evaluation efforts, a business-oriented campus climate, and campus-wide assessment structures. Various observers have noted that increased accountability creates incentives for academic libraries to engage in assessment (Smith, 2009; ACRL, 2010). Finally, within the past decade, numerous authors have highlighted the importance of proving that a library generates sufficient value and/or demonstrating that its services achieve their intended impact on users (e.g., Matthews, 2007; Dugan, Hernon and Nitecki, 2009; Oakleaf, 2010; Markless and Streatfield, 2013).

The preceding narrative has already hinted at contextual factors that could be construed to have influenced the Jerry Falwell Library's planning process in some way. These included the appointment of a new dean, preparation for an accreditation review, the move to a new building, strategic planning, and aggressive enrollment growth. However, the survey data collected for this case study revealed that planning process participants saw five factors as critical drivers of the assessment plan: value and impact, justification of needs, quality improvement, efficiency and effectiveness, and planning and decision-making.

<<Insert Table I near this point in the manuscript>>

The assessment planning process began when the dean charged the task force with

building a plan that would emphasize value and impact. Clearly, participants captured this emphasis, as a dozen survey respondents (71%) framed their comments on library assessment in these terms. One participant opined that assessment "is becoming more important in an effort to show the value of an organization and its services." Another stated succinctly, "Assessment legitimizes the [library's] value to the University." Respondents correlated value and/or impact with the accomplishment of goals, student outcomes and performance, customer perceptions of library services, and quantitative measurements of impact and productivity. Significantly, participants differed in their appreciation of the emphasis on library value. While some saw "an opportunity to demonstrate, with empirical data, the value we add to the academic environment," others lamented the "emphasis … being put on proving what we do and how we contribute."

Similarly, six participants (35%) cited the justification of library needs as a valid rationale for assessment. Survey respondents mentioned justifying needs pertaining to collections, staffing, and technology. One participant articulated the theme in these words: "The opportunity is that we could speak the language of numbers which seems the only concern of the upper administration in this current economy." Since the university's administrators are known for basing decisions on quantitative evidence, the association of assessment with justification was particularly perceptive.

Nine survey respondents (53%) cited quality improvement as an important reason for conducting assessment. Respondents referred to quality improvement in terms of evaluating programs and services, identifying unmet customer needs, improving operations and services, and demonstrating continuing relevance to the university community. One participant stated, "We have an opportunity to really learn from what the data is showing us and use it to … tweak programs and services." Related to quality improvement was the focus on assessment as a means

of pursuing efficiency and effectiveness. Five survey respondents (29%) spoke to this motive, all with seemingly genuine support. They described it in terms of process improvement, process costs, fiscal stringency, effective outcomes, and exposure of wasted resources.

An additional factor that was viewed as a driver of assessment was the need to support planning and decision-making (n=6; 35%). According to one participant, "Having good assessment data will help to give clearer direction for internal decision making." Another stated that assessment "should play an integral role in the planning and evaluation of programs and services."

As shown in Table I, three or fewer survey respondents mentioned certain other factors that might have been expected to shape assessment. All of the contextual factors mentioned in this section—whether suggested by the literature, the conditions under which the library has operated, or a survey response—likely had some influence on the planning process. Nevertheless, survey respondents seemed most conscious of a small number of factors. Critical external factors included the demonstration of value and the justification of library needs. While most respondents saw these as an opportunity or a pragmatic necessity, two exhibited some hostility towards them. Essential internal factors included quality improvement, the pursuit of efficiency and effectiveness, and the capacity for good decision-making. Internal factors attracted no negative sentiments among survey respondents.

*Planning process and product*

While the library literature documents varying approaches to planning library assessment (e.g., Applegate, 2009) and theoretical models of assessment planning (e.g., Shi and Levy, 2005), few have examined the planning process itself. In presenting four case studies of library assessment plans, Tatarka *et al.* (2010) documented practical approaches to assessment planning

for academic libraries. The planning process at the Jerry Falwell Library aligned most closely

with that of Columbia University (Tatarka *et al.*, 2010). In both cases, plan designers considered

assessment literature, strategic plan initiatives, and results of recent surveys and focus groups

with the desired outcome of an assessment planning process that would build a culture of

assessment and affirm the use of data in decision-making. An analysis of the survey data

collected for this case study revealed five main themes concerning the plan and its development:

the planning process, accountability for implementation, the scope of the plan, the plan's value

and impact orientation, and the pursuit of actionable insights.

<<Insert Table II near this point in the manuscript>>

Fourteen survey respondents (82%) discussed the planning process, with comments

ranging from a reiteration of process components to opinions about its effectiveness. It was

evident from the survey data that the planning process impacted participants in varied ways.

Positive statements about plan development highlighted that "the process was well thought out,"

that "there was an obvious effort to include all levels of staff," and that "it was good to think

through all of the data we are collecting … and how it could best be used." While the positive

outweighed the negative, some frustrations with the process were also evident. Participants

vocalized dissatisfaction with the time-frame for planning, lack of follow-up or feedback on their

suggestions for the plan, and a perception that individual contributions were not valued. Most of

these negative comments were accompanied by suggestions that future endeavors include more

people.

Among the dozen participants (71%) reflecting on accountability for implementation,

acceptance of responsibility correlated to the positive or negative comments regarding the

planning process. For example, the same individual who professed not to "know much about" the

assessment planning process also indicated that the library should "hire staff specifically … to demonstrate value of and importance of data." Those who expressed a more positive attitude toward the planning process seemed to take more personal interest in implementation and expressed an expectation for the collection and analysis of data to become a regular part of their duties.

Part of the assessment planning process was to link assessment activities to strategic plan initiatives where applicable. Correlating the two plans helped focus assessment efforts and represented an attempt to develop a manageable assessment plan. Nine respondents (53%) made remarks about the scope of the plan elements, and the majority concurred with the necessity "to keep the number of projects to a manageable level so that people will buy-in and complete the projects." One participant stressed that "if the data is not required for a report …, don't waste time and attention to collect and compile it." Some respondents seemed to imply that assessment efforts had already become unwieldy. These individuals lamented the intrusion of assessment into their work lives where "every function and process is scrutinized" and there is "a sense of needing to … document seemingly every action and interaction of the day."

The need to consider the value and impact of the library in assessment was a common theme within the survey responses, being mentioned by seven participants (41%). A tension existed in the data regarding the purpose of assessing value and impact. Some anticipated a need "to quantify our legitimacy to continue to exist" and others recognized an opportunity "to demonstrate … the value we add to the academic environment." Two respondents focused specifically on the difficulty of "objectively quantify[ing] the value a library has in student retention and student success."

Six participants (35%) described the pursuit of actionable insights with a certain level of

caution. Only one respondent was distinctly negative, with the individual expressing "confusion as to whether anything will happen because of work/effort" and complaining about "a sense of needing to graph/chart/stat/record/document seemingly every action." The remaining responses focused more on the need to "make time to analyze and use" the assessment data to better position the library to demonstrate needs.

Applegate (2009) indicated that current practice can provide the basis for a new assessment plan, and six participants (35%) recognized that the current assessment plan represented a continuation of the library's legacy of assessment. One respondent succinctly stated, "Assessment is nothing new at [the library]." Another said, "the plan simply organized and specified what we were assessing."

Four respondents (24%) mentioned the importance of a coherent plan, focusing on consolidation and organization of plan elements. As Table II shows, three or fewer participants commented on the difficulty of planning assessment and the diversity of plan elements.

*Organizational outcomes: towards a culture of assessment*

Often rooted in business process models for effecting organizational change, much of the literature on creating a culture of assessment in academic libraries follows a case study approach. Farkas (2013) and Carter (2014) discussed the application of John Kotter's organizational change model to their own library contexts in order to facilitate a culture of assessment. Similarly, Farkas and Hinchliffe (2013) discussed the implementation of the High Performance Programming model of organizational change. In their seminal work on library assessment culture, Lakos and Phipps (2004) provided an instrument that serves as a framework for identifying evidences of a culture of assessment, which can also serve as a practical guideline of steps to take in order to promote a culture of assessment. Farkas, Hinchliffe, and Houk's (in

press) survey research revealed factors which can facilitate the creation of a culture of assessment in academic libraries, as well as factors that may hinder it. MacAyeal (2014) provided five mindsets that are prevalent in libraries with a culture of assessment.

Creating a culture of assessment was not broadly communicated during the Jerry Falwell Library's assessment planning process. Nonetheless, it is significant to analyze the process and its outcomes to identify where notions related to building an assessment culture were present to encourage and validate the library's progression in moving toward that end. The analysis that follows reveals the presence of many characteristics documented in the literature as correlating to building a culture of assessment:

- conducting assessment for the purpose of improvement;

- focusing on customer needs;

- using assessment to support decision-making;

- realizing the importance of assessment in demonstrating impact and value;

- understanding the expectation to engage in assessment;

- integrating assessment into workflows;

- involving the entire organization in assessment;

- fostering an environment of trust; and

- sharing data across the organization.

As shown in Table III, an analysis of the survey data yielded nine organizational outcomes from the planning process that may relate to the building of a culture of assessment within the library. The following paragraphs will examine each outcome in descending order of prominence.

<<Insert Table III near this point in the manuscript>>

Twelve participants (71%) addressed the practical utility of the assessment plan and its

development. Negatively, the value of assessment efforts met with skepticism from one respondent who labeled it as boring "busy work." Nevertheless, the overwhelming majority of comments were positive. Assessment was viewed as a means to support decision-making, justify proposals, report on the library's impact, distinguish effective services from those requiring change, prove the library's worth, and uncover unmet user needs. Lastly, the planning process was viewed as a means to gain better understanding of assessment in general.

Eleven respondents (65%) recognized a sense of personal responsibility for implementing the assessment plan. The responses were a mix of positive and negative comments. Positively, participants expected to see a reduction in the amount of data collected as focus shifts to only the most useful metrics, anticipated more deliberate work with data, saw the continuity of new efforts with previous assessment, expressed appreciation for the value of assessment, and understood their personal responsibility. Additionally, the planning process revealed a need for action, as evidenced by this survey response: "I learned that I needed to communicate better and organize … so that it was easier and quicker to get the information desired." Negatively, respondents articulated concerns about the uncertainty of their personal responsibility. One participant expressed aversion to engaging in assessment: "I don't want my job to be about dissecting information and forming reports, and I am glad that I'm part of the team that is closer to being on the ground with the students." Another respondent emphasized the need for demonstrating the relevance of assessment, stating that employees need "to see the benefit to the library and to their own work."

Ten survey respondents (59%) addressed the organization's capacity to implement the newly-created assessment plan in terms of fatigue, energy, and conflicting priorities. Participants clearly understood the demands that would be required of their time and energy in order to carry

out the plan and expressed numerous concerns. A repeated concern was the limited amount of time available to dedicate to assessment work coupled with already-existing demands competing for time and attention. Respondents were optimistic that assessment could take place given more effective and efficient processes, a narrowed focus on conducting only necessary assessment, and a greater emphasis on the importance of assessment.

Analysis of survey data revealed broad recognition of the importance of assessment (n=10; 59%). Nevertheless, various nuances existed, including reference to administrators' priorities, and an opinion that assessment in the library is not of highest importance, which was balanced with an appreciation that assessment's importance is increasing. Two respondents noted that assessment plays an integral part in the library, one stating, "assessment must be fully integrated into what we do." The understanding of the importance of assessment is enhanced given its pragmatic uses. Respondents identified ultimate uses for assessment such as showing value, improving the library, planning and evaluation, and identifying unmet customer needs. The importance of assessment is best captured by one participant's comment: "It helps to keep the library as [a] living, breathing, growing library that stays relevent [sic]."

Nine participants (53%) voiced a concern about follow-through in implementing the assessment plan. One respondent candidly stated, "It will be difficult to focus attention to actually follow through with the plan. It will always be an [sic] temptation to sideline assessment tasks." To ensure implementation, respondents offered the following suggestions:

- building progressively on small successes;

- sustaining assessment as a year-long effort;

- creating good strategies for implementation;

- achieving balance of assessment with already busy roles;

- keeping the new assessment process in place in order to build efficiency over time;

- reducing meetings;

- involving the entire organization in assessment;

- maintaining the prominence of assessment among other priorities;

- continuing previous data collection efforts while improving data analysis; and

- allowing for failure through trial and error.

Under the new assessment plan, nine participants (53%) expected sharing to occur beyond departmental boundaries—a change from their previous experience. One participant commented that "statistics were gathered for most areas, but rarely were they disseminated outside of the particular departments." Another shared the same sentiment, but followed with, "It appears that there will be an increase in data sharing, transparency, and collaboration about assessment."

Eight respondents (47%) commented on aspects of organizational learning through assessment. The most common applications of knowledge gained through assessment were improvement of services and processes, improvement of impact on students, and the continuation of professional growth. Other outcomes related to learning included the identification of areas of need and continued evolution in response to customer needs. One respondent emphasized not just the acquisition of knowledge through assessment, but also the opportunity to apply that knowledge to effect change: "we need to make sure the results are analyzed in such a way that knowledge is gained and 'applied,' so that we seize the opportunity to improve the impact of the library on student performance."

Five respondents (29%) commented on awareness of the assessment plan or the planning process. Most replies revealed a mature or maturing understanding of assessment. One

respondent expressed appreciation for the process: "Before this experience, I had little exposure to the vocabulary and process of assessment. I appreciated that I was placed in an affinity group that was able to explain things to me as we developed our assessment plan for this year." A small minority did not feel informed, with one participant succinctly stating, "I don't know much about it." Finally, for some, the library's history of assessment had been hidden and through the process came to light. As one respondent commented, "In the two years that I've worked at the Jerry Falwell Library, I have only known about the assessment in the past few months since I was directly involved with it."

Finally, four respondents (24%) directly or indirectly mentioned the library's culture and assessment's role within it. As a cultural value, one participant emphasized how assessment work should be organizationally inclusive, "including all departments of the library." Another inferred decentralization of assessment efforts across the library, stating, "Assessment is more thorough when responsibility is disseminated throughout the organization." One respondent clearly stated the necessity of having an assessment-based culture, stating, "assessment must become wholly integrated into our culture." The other participant who used the term *culture* perceived potential danger, envisioning that assessment could "have a devastating effect on our library as a culture, moving us from more familial toward more corporate." The expectant result was high turnover as the values from the two mindsets clashed.

## Conclusion

The conditions that prevailed within and around the Jerry Falwell Library during its assessment planning process provided a suitable environment for organizational change, leading to the furtherance of a culture of assessment. Participants saw planning as the product of both external and internal factors. Internal factors, including quality improvement, the pursuit of

efficiency and effectiveness, and decision support, enjoyed broad acceptance. Response to external factors, such as the demonstration of value and the justification of library needs, was more varied.

Survey respondents' evaluations of the planning process were mixed. Participants appreciated the design of the process, the effort to include individuals from all levels of the organization, and the opportunity to reflect on the assessments most appropriate to one's department. Frustrations were also evident, often relating to inadequate communication. Participants varied in the extent to which they accepted responsibility for enacting the plan, typically showing congruence with their opinion of the planning process. The need to measure the value and impact of the library was a common theme. Several respondents were concerned about the prevalence of assessment in their work lives, voicing the need to keep assessment focused and relevant.

Survey responses revealed substantial evidence of conditions associated with the development of a culture of assessment. Participants' statements revealed a mature or maturing understanding of assessment. There was a near universal recognition of the importance of assessment, though not always with positive sentiment. Respondents viewed assessment as useful for showing value and impact; improving the library; supporting planning, evaluation, and decision-making; identifying unmet customer needs; and justifying proposals.

Participants recognized a sense of personal responsibility for implementing the assessment plan and understood the time and energy that this would require. These perceptions led to a mixture of negative and positive responses, particularly in view of the demands competing for employees' time and attention. Respondents envisioned that, under the new plan, management information would be shared beyond departmental boundaries more often than it

had been in the past. A handful of responses clearly recognized that the assessment plan would entail the transformation of organizational culture. This prospect generated responses that ranged from enthusiasm to defensiveness.

This case study has documented the opportunities and challenges of developing a library assessment plan at a rapidly evolving university. Its findings are perhaps most adaptable to institutions whose missions, like Liberty University's, are defined more by teaching than research. Planning for the future of library assessment offers a significant opportunity for organizational change, but the goal of developing a culture of assessment is not to be achieved easily or quickly. A key implication for other libraries is that employees may be most inclined to support an assessment agenda when it is driven by internal factors such as quality improvement and the pursuit of efficiency and effectiveness.

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[1] A more detailed description of the Jerry Falwell Library's assessment planning process is available at: http://digitalcommons.liberty.edu/lib_fac_pubs/99/

[2] A sample of the Assessment Plan Template used during the planning process is available at: http://digitalcommons.liberty.edu/lib_fac_pubs/99/

| Theme | Respondents Addressing Theme |
|---|---|
| Value/impact | 12 (71%) |
| Quality improvement | 9 (53%) |
| Justification of library needs | 6 (35%) |
| Planning/decision-making | 6 (35%) |
| Efficiency/effectiveness | 5 (29%) |
| Accountability | 3 (18%) |
| Reporting | 3 (18%) |
| Administrative mandate | 2 (12%) |
| New building | 2 (12%) |
| Accreditation | 1 (6%) |
| Online learning | 1 (6%) |
| Strategic plan | 1 (6%) |

**Table I** Analysis of Survey Data: The Context of the Planning Process

| Theme | Respondents Addressing Theme |
|---|---|
| Planning process | 14 (82%) |
| Accountability for implementation | 12 (71%) |
| Scope of plan | 9 (53%) |
| Value/impact orientation | 7 (41%) |
| Continuity with legacy of assessment | 6 (35%) |
| Pursuit of actionable insights | 6 (35%) |
| Coherence of plan | 4 (24%) |
| Difficulty of planning assessment | 3 (18%) |
| Diversity of plan elements | 1 (6%) |

**Table II** Analysis of Survey Data: Planning Process and Product

| Theme | Respondents Addressing Theme |
|---|---|
| Appreciation of practical utility | 12 (71%) |
| Personal responsibility for implementation | 11 (65%) |
| Fatigue/energy/conflicting priorities | 10 (59%) |
| Perceived importance | 10 (59%) |
| Follow-through | 9 (53%) |
| Sharing across organization | 9 (53%) |
| Organizational learning | 8 (47%) |
| Awareness | 5 (29%) |
| Organizational culture | 4 (24%) |

**Table III** Analysis of Survey Data: Organizational Outcomes