Analytics & Advocacy for Service Development

Contents

How to Cite: Hinchliffe, Lisa Janicke, Mayer, Cathy, & Consortium of Academic and Research Libraries in Illinois. *Analytics and Advocacy for Service Development: Getting Started Guide*. Champaign, IL: CARLI, 2022.

Analytics for Advocacy for Service Development: Getting Started Guide

Background Information

This guide contains an overview of content needed to run an Analytics for Advocacy for Service Development (AASD) library leadership training program for academic librarians. Content, made possible by funding from the Laura Bush 21st Century Librarian Program Grant through the Institute of Museum and Library Services, was originally utilized in 2019 with the inaugural CARLI Counts cohort.

Curriculum Topics for AASD

- Library Assessment
- Service Design
- Advocacy
- Leadership
- Data Ethics & Privacy
- Storytelling
- Evidence-based Library Practice

Audience

AASD is designed to prepare academic librarians to make effective use of research findings related to the impact of libraries on student success for the purposes of service development and library advocacy.

Training Methods

AASD pedagogy uses peer-to-peer learning and community of practice approaches. Participants engage with team-based and cohort structures to foster collaborative learning, sustained interaction through face-to-face and online training sessions, year-long project work, and a culminating presentation. The recommended number of cohort participants is 18-48, with teams composed of 5 participants plus a dedicated participant-mentor.

The training is designed to be highly participatory and therefore it is recommended that participants have confirmed support of library and/or campus leadership to access relevant data and dedicate focused attention to the program in order to produce a meaningful local case study project.

Training Materials

- Trainer Workbook
- PPT Module Lectures
- Participant Workbook

Training Deliverable: Local Case Study Project

Each AASD participant will complete a case study project designed to analyze local library data to improve services and demonstrate their value in alignment with institutional data, goals, and strategic priorities.

Training Components

Core Curriculum

AASD Core Curriculum includes eight sequential modules:

1. Program Overview
2. Unpacking Variables & Claims
3. Research Question Development
4. The Research Question, Variables, & Methods
5. Respect for Human Subjects in Advocacy Work
6. Methods and Participants
7. Data Analysis and Data Narratives
8. Community Communication

Peer to Peer Learning Communities

Assigned teams will provide the primary forum for discussion of core lectures and will collaborate throughout the duration of the cohort. As individual projects take shape, participants can also be sorted into "Birds of a Feather" affinity groups to support additional focused discussion. Some attendees may have overlap within their team and affinity group, while others may not.

Preparing Training Space

In-person Immersion Experiences

The AASD in-person immersion experience training days include lectures and small group discussion and collaboration. For this reason, participants should sit in their teams at tables arranged around the room. Reserve space at the front of the room for the trainers, computer, projector and screen, and a flip chart or whiteboard. Markers and post-it notes may be helpful for groups that prefer to brainstorm in a physical medium. Alternatively, a stylus, touch screen device, and software to capture written brainstorming in a digital format may be used if available. A separate secluded space for focused team development or one-on-one coaching with mentors and training facilitators can be helpful if available.

Webinars & Online Training

A secure video conference platform equipped with video, audio, chat, screensharing, and recording capabilities is required to host and capture webinar content. For online training sessions, break-out room capabilities and unique links for one-on-one scheduled sessions are advisable. If available, a learning management system can streamline the management of

information dissemination to a cohort and facilitate group discussions and collaboration. Shared file space is advisable to support collaborative group work.

Training Schedule

The AASD training is designed to include two multi-day immersive training experiences, each with supplementary content offered as needed via 30-60 minute webinars. An example schedule with estimated session lengths is included below. Facilitators are encouraged to adjust the schedule, add breaks or meals when it works best. A detailed sample schedule from the CARLI Counts 2019 Cohort is included in the Supplemental Materials appendix.

Immersive Training Days

Immersive training days feature a blend of core curriculum presentations and community building social interactions. The core curriculum equips attendees to conduct research and effectively use findings in local advocacy. Meanwhile, the peer-to-peer learning supports deeper engagement and community building. Additional supplemental content may also be included in immersive training days as time and resources allow.

Training Webinars

Training webinars offer a mix of core curriculum, supplemental content, and continued community building. Core curriculum presentations are designed to support attendees in the implementation of local research projects. Supplemental professional development topics should be tailored based on needs, resources, and available speakers. A sampling of ideas for topics and speakers from CARLI Counts can be found in the Speakers Appendix.

Attendees are encouraged to engage with the webinars in real-time to build community, but sessions should also be recorded and made available for time-shifted viewing.

Sample Schedule

A sample training schedule with estimated session lengths is included below. A detailed example featuring the inaugural 2019 CARLI Counts Cohort is provided in the appendix of this guide.

Immersive Training Experience #1

Day 1	Day 2	Day 3
• Welcome Dinner (60m) • Social Activity (60m) • Team Building Activity (60m) • Next Steps (15m)	• Breakfast (60m) • **Module 1: Program Overview** (90m) ○ 60m lecture ○ 30m team development • Break (15m) • **Module 2: Unpacking Variables & Claims** (150m) ○ 90m lecture ○ 60m team development • Lunch (60m) • **Module 3: Uncovering Claims & Data** (120m) ○ 60m lecture ○ 60m team development • Break (60m) • Dinner (90m)	• Breakfast (60m) • **Module 4: The Research Question, Variables, & Methods** (105m) ○ 45m lecture ○ 60m team development • Break (15m) • Birds of a Feather – Flock Formulations & Breakout Discussions (60m) • Lunch (60m) • **Module 5: Respect for Human Subjects in Advocacy & Analytics Work** (90m) ○ 60m lecture ○ 30m team development • Break (15m) • Recap, Next Steps & Assessment (30m)

Post Immersion #1 Online Training

- Supplementary Webinar *(30-60 minutes, topic selected in response to participant needs and offered between immersions as a check-in and point of connection)*

(Sample Schedule Continued)
Immersive Training Experience #2

Day 1	Day 2	Day 3
• Optional Enrichment & Social Activity (90m) • Dinner (60m) • Social Activity (30m) • Birds of a Feather – Flock Break Out Discussions (60m)	• Breakfast (60m) • **Module 6: Methods and Participants** (90m) ○ 60m lecture ○ 30m team development • Break (15m) • Birds of a Feather – Flock Break Out Discussions (60m) • Lunch (60m) • **Module 7: Data Analysis and Data Narratives** (90m) ○ 45m lecture ○ 45m team development • Break (90m) • Dinner (90m)	• Breakfast (60m) • **Module 8: Community Communication** (90m) ○ 20m lecture ○ 70m team development • Break (15m) • Lunch (60m) • Next Steps: Team Meetings, Webinars, & Presentations (30m)

Post Immersion #2 Online Training
- Supplementary Webinar *(30-60 minutes, topic selected in response to participant needs)*
- One-on-One Coaching with Program Facilitator for Individual Case Study Project *(15-45minutes, 1 required for each participant, scheduled within 2 months of immersion)*
- Open Office Hours with Program Facilitator for Case Study Project Support *(15-60 minutes, Optional, scheduled periodically and one-on-one by request in the final months of the training program)*

Team Poster Presentations
- Offered as professional development opportunity for colleagues who did not participate in AASD training to understand the outcomes and value of the program.

Tips for Facilitators

AASD attendees will likely offer substantial diversity in professional experience, from early and mid-career professionals to those with decades of library experience. Similarly, participants' professional expertise can cover a range of library departments including instruction, reference, public services, technical services, and administration. Further diversity within the group may come from varied institutional contexts including public universities, private colleges, and community colleges that serve diverse student populations and offer a range of programs.

To foster mutual respect and productive dialog, consider offering pre-established discussion ground rules to establish group norms and expectations at the start of training. The University of Minnesota Extension offers a high-level overview for "Setting ground rules for productive discussions"[1] and the Teaching+Learning Lab at MIT has also compiled a list of common "Discussion Guidelines."[2]

Adapting Materials

The COVID-19 pandemic required a pivot for the second cohort of CARLI Counts in 2020, which allowed for only one immersive training experience in February 2020. In-spite of broad upheaval caused by the pandemic, participants who completed the program online remained committed to learning and reported strong affinity with their teams. A third cohort in 2021 engaged in a fully online version of the training program. Thus, delivery of content in the AASD curriculum can be modified to accommodate a hybrid or fully virtual model.

---

[1] https://extension.umn.edu/public-engagement-strategies/setting-ground-rules-productive-discussions

[2] https://tll.mit.edu/teaching-resources/inclusive-classroom/discussion-guidelines/

Appendix:
CARLI Counts Cohort I Sample Schedule

Cohort One, In-Person Session One -- February 19-21, 2019

Time	Activity	Meeting Room and Notes
February 19		
3:30–4:00 p.m.	Mentors-Only Meeting	Quad Room
3:00–5:00 p.m.	Check-In and Photos	Hallway outside Quad Room
5:30–6:30 p.m.	Welcome and Dinner	Quad Room
6:30–7:30 p.m.	Two Truths and a Lie Activity	Quad Room
7:30–8:30 p.m.	Rube Goldberg Kit Activity	Quad Room
8:30–8:45 p.m.	Preview Next Day	Quad Room
February 20		
8:00–9:00 a.m.	Breakfast	Quad Room
9:00–10:30 a.m.	Welcome Program Overview - Conceptual Frameworks - Program Models - Team and Mentor Structure - Role of "Experts" - Deliverables – Library Reports and Team Posters	Tech Room **Welcome** 　　Barbara J. Wilson, University of Illinois System Executive Vice President & Vice President for Academic Affairs 　　Cindy Fuller 　　Library Director, Millikin University 　　CARLI Board Chair
10:30–11:00 a.m.	Break	Snacks in Tech Room
11 a.m.–noon	Case Study: Lewis & Clark Community College Dennis Krieb Director of Institutional Research and Library Services, Lewis & Clark Community College	Tech Room The session will explore efforts at Lewis & Clark Community College to link data to library value.
Noon–12:30 p.m.	Unpacking Variables and Claims	Tech Room
12:30–1:30 p.m.	Lunch	Quad Room **Welcome** 　　Sarah M. Zehr, University of Illinois System Assistant Vice President for Academic Affairs

Time	Activity	Meeting Room and Notes
February 20 continued		
1:30–3:00 p.m.	Team Development	Convene with your team in either room
3:00–3:30 p.m.	Break	Snacks in Tech Room
3:30–4:30 p.m.	How to Do Hard Things with Loads of Doubt: Practicing Reflection, Failure, and Change Beck Tench PhD Student Information School University of Washington http://becktench.com	Tech Room In CARLI Counts, we're asking you to do things you might not know how to do, before you're ready, and in front of others. You could say we are encouraging you to risk failure and somehow be okay with that. But we can't throw around words like "vulnerability" and "failure" without acknowledging the pain, fear, and discomfort that comes with them. In this talk, we'll talk about the hard truths of changing, failing, and cultivating self-awareness and we'll explore strategies to face those truths with integrity and courage.
4:30–5:00 p.m.	Recap and Assessment	Tech Room
5:00–6:30 p.m.	Break on your own (Participants)	
5:15–6:15 p.m.	Mentors-Only Meeting	Tech Room
6:30–8 p.m.	Dinner	Quad Room
February 21		
8:00–9:00 a.m.	Breakfast	Quad Room
9:00–9:30 a.m.	Reconnect	Tech Room
9:30–10:30 a.m.	Uncovering Claims and Data	Tech Room
10:30–11:00 a.m.	Break	Snacks in Tech Room
11:00 a.m.–12:30 p.m.	Developing Campus Projects	Tech Room
12:30–1:30 p.m.	Lunch	Quad Room
1:30–3:00 p.m.	Team Time and Peer Review	Convene with your team in either room
3:00–3:30 p.m.	Recap, Next Steps (Webinars, Doing Your Work, etc.), and Assessment	Tech Room

Cohort One, Core Webinar -- March 13, 2019

Time	Activity	Meeting Room and Notes
March 13		
3:30–4:00 p.m.	Respect for Human Subjects in Advocacy and Analytics Work Lisa Janicke Hinchliffe	Zoom This session explores ethical responsibilities of librarians engaged in conducting research, including ALA's code of ethics, definition of key terminology (e.g. personally identifiable information, confidentiality), general principles from the Belmont Report, and Institution Review Board policies and procedures.

Cohort One, Supplementary Webinar -- June 5, 2019

Time	Activity	Meeting Room and Notes
June 5		
3:30–4:00 p.m.	Effecting Change Katherine Skinner, PhD Executive Director, Educopia Institute	Zoom This session from Educopia Institute's Executive Director Katherine Skinner, explores how to build a case for change by defining "What" – a goal, "Who"- a target audience and their "Why"—framing messages, planning the "How" of message delivery, and monitoring messaging to adjust to effectively communicate.

Cohort One In-Person Session Two --July 15-17, 2019

Time	Activity	Meeting Room and Notes
July 15		
2:00–3:00 p.m.	Krannert Art Museum Tour	Krannert Art Museum Lobby
3:30–4:30 p.m.	Mentors-Only Meeting	Quad Room
3:00–5:00 p.m.	Check-In	Hallway Outside Quad Room
5:30–6:30 p.m.	Welcome and Dinner	Quad Room
6:30–7:30 p.m.	Human Bingo	Quad Room
7:30–8:30 p.m.	Birds of a Feather - Flocks	Quad Room
July 16		
8:00–9:00 a.m.	Breakfast	Quad Room
9:00–10:30 a.m.	**Welcome and Introduction** Lisa Hinchliffe **The Higher Education Context** Gianina Baker Assistant Director, National Institute for Learning Outcomes Assessment, University of Illinois at Urbana-Champaign	Quad Room
10:30–11:00 a.m.	Break	Snacks in Tech Room
11:00–11:30 a.m.	**Inquiry Process: Bridges and Barriers** Lisa Hinchliffe	Tech Room
11:30 a.m.–12:30 p.m.	Team Time – Project Sharing	Tech Room
	Team Time with Beck • 11:30-12:00 – Teal (Anne) • 12:00-12:30 – Purple (Jennifer)	Outside Tech Room
12:30–1:30 p.m.	Lunch and Birds of a Feather - Nests	Quad Room

Time	Activity	Meeting Room and Notes
July 16 (continued)		
1:30–2:00 p.m.	**Team Posters: Details and Guidance** Lisa Hinchliffe	Tech Room
2:00–3:00 p.m.	Team Time – Poster Preparation and Project Sharing	Tech Room
	Team Time with Beck • 2:00-2:30 – Green (Amber) • 2:30-3:00 – Red (Mary)	Hotel Lobby
3:00–3:30 p.m.	Break	Snacks in Tech Room
3:30–5:00 p.m.	Team Time – Poster Preparation and/or Project Sharing	Tech Room
	Team Time with Beck • 3:30-4:00 – Blue (Heather) • 4:00-4:30 – Orange (Amy)	Outside Tech Room
5:00–6:30 p.m.	Break (Participants)	
5:15–6:15 p.m.	Mentors-Only Meeting	Tech Room
6:30–8:00 p.m.	Dinner	Quad Room
July 17		
8:00–9:00 a.m.	Breakfast	Quad Room
9:00–9:30 a.m.	**Community Communication** Lisa Hinchliffe	Tech Room
9:30–10:30 a.m.	Team Time – Community Communication, Poster Preparation, and/or Project Sharing	Tech Room
	Team Time with Beck • 9:30-10:00 – Fuchsia (Rachelle) • 10:00-10:30 – Yellow (Jen-chien)	Outside Tech Room

Time	Activity	Meeting Room and Notes
July 17 (continued)		
10:30–11:00 a.m.	Break	Snacks in Tech Room
11:00 a.m.–12:30 p.m.	**Storytelling Thinking** Kate McDowell Associate Professor and Interim Dean for Academic Affairs, School of Information Sciences, University of Illinois at Urbana-Champaign	Tech Room
12:30–1:30 p.m.	Lunch	Quad Room
1:30–2:15 p.m.	Team Time – Apply Storytelling Thinking to the CARLI Counts Case Study	Tech Room
2:15–3:15 p.m.	Memory Wall with Beck	Tech Room
3:15–3:30 p.m.	Next Steps – Team Meetings, Webinars, CARLI Annual Meeting, etc.	

Cohort One, Supplementary Webinar -- November, 2019

Time	Activity	Meeting Room and Notes
November		
Not Available	How to Not Lie with Data: An Introduction to Data Analysis & Visualization Jill Naiman NCSA/iSchool	Zoom This session introduces concepts, vocabulary and tools for exploring data visualization to effectively demonstrate the impact of an academic library.

Appendix: Speakers

Featured Speakers

Individuals listed as "Featured Speakers" presented at a CARLI Counts immersive training, webinar, or training for team mentors.	
Speaker	**Topic(s)**
Anne Craig - CARLI Counts Principal Investigator & CARLI Senior Director (*Contact info*)	Leadership, Advocacy, Evidence Based Library Practice
Gianna Baker -National Institute for Learning Outcomes Assessment (NILOA) Acting Director (*Contact info*) Explore: NILOA Resources	Assessment, Advocacy
Karen Brown – CARLI Counts Grant Evaluator (*Contact info*)	Assessment, Evidence Based Planning
Lisa Janicke Hinchliffe - CARLI Counts Co-Principal Investigator & Professor and Coordinator for Research and Teaching Professional Development (*Contact info*)	Library Assessment, Service Design, Evidence-Based Library Practice, Advocacy, Leadership, Data Ethics & Privacy,
Dennis Krieb - CARLI Counts Curriculum Advisor, Director of Institutional Research & Library Services (*Contact info*)	Case Study – Lewis & Clark Community College, Institutional Research, Survey Design, Storytelling with Data
Cathy Mayer – CARLI Counts Participant, Mentor, & Curriculum Organizer (*Contact info*)	Conducted Case Study for CARLI Counts 2019, Mentoring
Kate McDowell – Associate Professor, UIUC iSchool (*Contact info*) Explore: Storytelling Resources	Storytelling Practices & Applications, Libraries as Cultural Spaces
Jill P. Naiman – Assistant Profession, UIUC iSchool and Visiting Scholar at NCSA (*Contact info*)	Data Visualization
Beck Tench – Practitioner, Teacher, PhD Student, Researcher (*Contact info*) Explore: Blog and Resources on Contemplation	Contemplative Practices, Design Thinking, Leadership, Tools for Teaching & Community Building

Additional Speakers

Individuals listed as "Additional Speakers" participated in the CARLI Counts program, served as a program mentor, and/or continued to build upon data gathered for analytics and advocacy.	
Speaker	**Topics**
Yasmine Abou-El-Kheir – Director of Lapp Learning Commons, Chicago Theological Seminary (*Contact info*)	Conducted Case Study for CARLI Counts 2020, Data Collection & Advocacy, Storytelling with Data
Kim Hazlett – Interim Library Director, Lake Forest College (*Contact info*)	Conducted Case Study for CARLI Counts 2019, Mentoring
Kimberly Shotick- Student Success Librarian & Assistant Professor, Northern Illinois University (*Contact info)*	Conducted Case Study for CARLI Counts 2019
Kris Veldheer – Library Director, Catholic Theological Union (*Contact info*)	Conducted Case Study for CARLI Counts 2020, Data Collection & Advocacy, Storytelling with Data
Frances Whaley – Library Director, Kishwaukee College (*Contact info*)	Mentoring, Grant Writing Using Data
Jen-chien Yu – Director of Library Assessment, UIUC Library (*Contact info*)	Conducted Case Study for CARLI Counts 2019, Mentoring, Assessment
*Note: Browsing individual project reports from CARLI Counts Cohort I and Cohort II may provide additional attendees who are willing and able to present a case study report of their AASD project investigation and outcomes.	