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Title

Qualitative Analysis of Academic Program Review Reports: UC Berkeley Library's Collaborative, Research-driven Approach for Strategic Planning and Continuous Improvement

Permalink

<https://escholarship.org/uc/item/2jj6p63d>

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Publication Date

2014-07-24

Peer reviewed

Qualitative Analysis of Academic Program Review Reports

UC Berkeley Library's collaborative, research-driven approach for strategic planning and continuous improvement



Purpose

Design library enhancements through a collaborative and qualitative research approach that intensively studies our academic departments' needs

Approach

- Engage library liaisons to conduct qualitative content analysis of academic program review documentation
- Use collaborative findings to inform the design of strategic library enhancements
- Develop as a replicable organizational learning exercise

Academic Program Review

Berkeley academic departments regularly undergo an Academic Program Review to identify opportunities and challenges, assess their future, and pursue new paths of inquiry and discovery.



The resulting APR self-study reports are a snapshot of departments' strategic plans, experiences, and needs. These reports are shared with the Library, and they serve as a rich data source for library planning and organizational learning.

Techniques

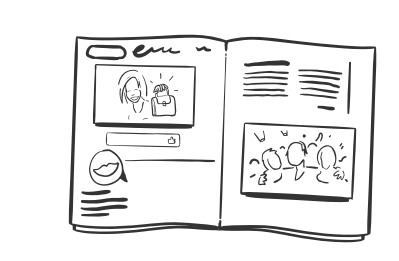
Research grounding



Gather evidence to deepen our understanding, inform decision-making, and facilitate longitudinal analysis for the following questions:

- What are the key developments, priorities, activities, and goals within academic departments?
- How could these issues impact our academic libraries?
- What enhancements would align the library with academic departmental advancement?

Qualitative research methods



Conduct a content analysis of APR reports:

- Identify representative or critical units of text for data (e.g., key quotes, examples)
 - Code the units of text to identify patterns, themes, or underlying meaning
 - Engage in memoing, a reflective review to formulate conclusions, answers, and ideas
- Based on White and Marsh, *Library Trends*, 55(1):22-45.

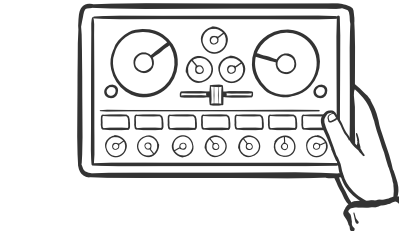
Collaborative and open process



Conduct an inclusive and participatory exercise where all library liaisons may share learning, identify common challenges, and brainstorm solutions

Explore emerging and overlooked issues

Methodical procedures



Foster reliable and replicable analysis through research training and a procedures manual

Substantiate strategic planning ideas with evidence of need and priority

Methodology

- After an academic department's review, the Vice Provost's Office shares the APR self-study report with the Library.
- The Library shares the APR reports with library liaisons for internal use via a secure, password-protected digital repository.
- Liaisons learn to conduct qualitative content analysis of reports through a training session and a research procedures manual.

Liaisons analyze reports to identify library needs and relevant library enhancements. This qualitative content analysis is guided by three frameworks.

APR themes

To facilitate report analysis for library-relevant issues

- People**: Diversity, Roles and units (demographics and distribution), Recruitment goals and methods
- Relationships**: Partnerships and collaborations, Research and instructional support and mentorship, Scholarly discourse and interactions
- Space**: Physical space, Online space
- Path**: Agenda and scholarly goals, Nature of the scholarly enterprise, Activities and offerings, Barriers
- Quality**: Positive experiences; Achievements, strengths, and status in scholarly and service activities; Measures of success and attainment
- Advancement**: New directions, Innovations for scholarly and service activities
- Support**: Funding, Administrative units/positions and their activities, roles, and engagement

SWOT+P

To categorize findings and identify strategic priorities

	Helpful things	Harmful things
Internal origin	Strengths and Priorities Identify core areas for library support and enhancement	Weaknesses Identify ways to support a department's advancement
External origin	Opportunities Facilitate library planning for emerging issues and future	Threats Anticipate problems and their solutions

Library enhancement design

To brainstorm library enhancements

Liaisons successively record notes on departmental issues, their library impact, and proposals for relevant library enhancements.

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graph LR
    A[Departmental issue] --> B[Potential library impact]
    B --> C[Library enhancement]
    
```

- Compile all collected notes into an Excel spreadsheet.
- The research analyst codes liaisons' findings for collective themes. Analysis conducted in Excel.
- Prepare the final report to highlight patterns in departmental needs and the opportunities for collaboration among subject area liaisons. For each theme, outline the issues, their potential library impact, and related service enhancements.

- | | |
|---|---|
| <p>Pre-determined themes</p> <ul style="list-style-type: none"> Access to Collections Acquisitions Administration (AUL-level) Archiving Cataloging Circulation and Stack Management Services Instruction Liaison/Outreach Management (Unit/Department) Professional Responsibilities Reference Selection Web Services | <p>Emergent themes</p> <ul style="list-style-type: none"> Change in Academic Departments Collections Strategy Instructional Needs Interdisciplinary Activities Learning Needs Patron Groups Physical Library Space Research Needs Scholarly Communications Needs Technologies and Computing Value of Academic Libraries |
|---|---|

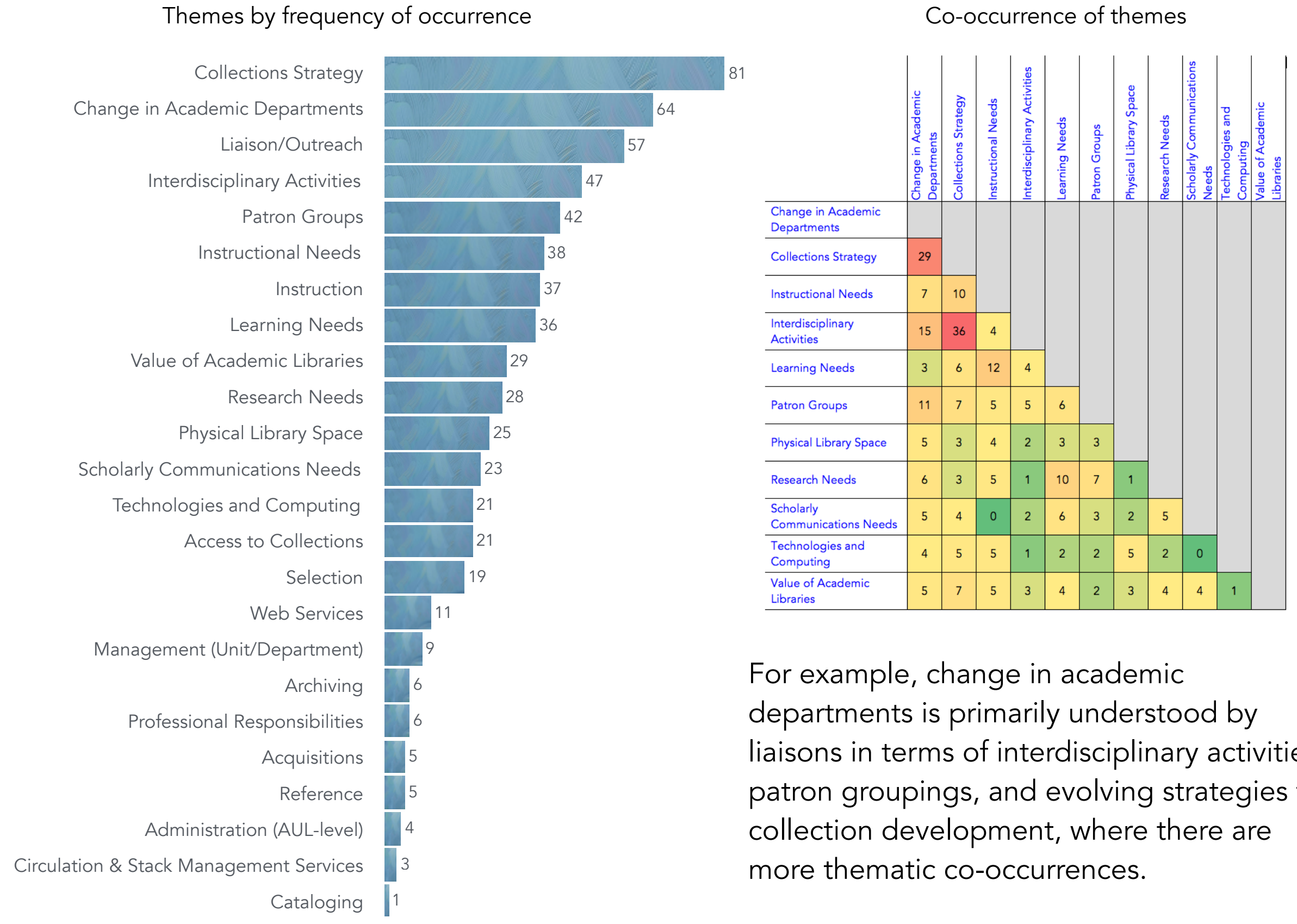
- Share the final report with all library personnel. Share the data set to encourage use and customized analysis.
- Conduct an open meeting to discuss findings among all library personnel for organizational learning and strategic planning. Determine collective priorities for library enhancements.
- Repeat the exercise as part of a scheduled review cycle.

Value to organizational learning

Reveal departments' candid perspectives
We saw themes we did not expect to see and collected perceptions of library and information services not previously voiced.

Identify priorities
We detected issues of shared interest across academic departments and disciplines.

Reveal relationships among priorities
Through the co-occurrences of themes, we identified the intersection of issues to consider.



For example, change in academic departments is primarily understood by liaisons in terms of interdisciplinary activities, patron groupings, and evolving strategies for collection development, where there are more thematic co-occurrences.

Value to strategic planning

- Unique compatibility with library liaisons**: Liaisons serve as researcher-practitioners to design solutions from their findings and deliver them as part of liaison work.
- Efficient and intensive learning**: By comparison, short surveys, direct observations, and focus groups have a larger overhead and may not capture the deep insights, community visions, and long-term goals articulated in an APR report.
- Pathway for continuous assessment**: Our methodology and procedures are extensively documented for future exercises. APR reports are routinely shared with the Library and serve as a continuous data stream.

Best practices

- Use qualitative research methods to [identify emerging themes and trends](#)
- Keep the exercise [simple](#) to motivate participation
- Use [guided activities](#) to scaffold broad exploration by library personnel
- Use [evaluative frameworks](#) and worksheets to facilitate data collection and analysis
- Provide many avenues of [support](#) for research training and conduct
- [Communicate the link](#) between findings and library enhancement ideas
- [Share data](#) to inform decision-making and for customized analyses
- Document procedures for [turnkey iterations](#) of the exercise

Conclusion

We identified library enhancements in an open, inclusive, collaborative, and research-driven manner. Our methodology, exercises, and frameworks espoused a systematic and research-based approach that is replicable for longitudinal assessment and encourages evidence-based decision making for organization development.

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