

Introducing the  
*Values-Sensitive Library Assessment Toolkit*  
A Practical Approach for Ethical Assessment

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Scott W. H. Young  
Library Assessment Conference  
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**All slides and materials are available  
at the following URL:**

**[tiny.cc/lac22slides](https://tiny.cc/lac22slides)**



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Illustration by Layet Johnson

Hi, I'm Scott, the **UX & Assessment Librarian**  
at **Montana State University** in Bozeman, MT

# Outline for today

## Opening

Research overview and presentation of the toolkit

– 20 minutes

## Activity 1

*Connect Two*

– 10 minutes

## Activity 2

*Must-Haves*

– 10 minutes

## Activity 3

*Anchors & Sails*

– 10 minutes

## Breakout

Discussion in small groups

– 15 minutes

## Closing

Questions, insights, challenges, and next steps

– 10 minutes

# Background and Motivation

**Situation**

**Complication**

**Question**

# Background and Motivation

## Situation

Assessment involves the collection and analysis of data to better understand the library and its users.

Practitioners make decisions everyday about what data to collect, how to collect it, and who to involve in the assessment.

## Complication

## Question

# Background and Motivation

## Situation

Assessment involves the collection and analysis of data to better understand the library and its users.

Practitioners make decisions everyday about what data to collect, how to collect it, and who to involve in the assessment.

## Complication

Practitioners operate in complex environments with multiple, competing stakeholders, priorities, and values.

Tensions arise when values conflict.

## Question

# Background and Motivation

## Situation

Assessment involves the collection and analysis of data to better understand the library and its users.

Practitioners make decisions everyday about what data to collect, how to collect it, and who to involve in the assessment.

## Complication

Practitioners operate in complex environments with multiple, competing stakeholders, priorities, and values.

Tensions arise when values conflict.

## Question

How can library assessment be practiced ethically?



# Project Results

## **Theoretical Approach**

Practitioners can practice ethical assessment by articulating and enacting the values that are relevant in our local contexts.

## **Practical Toolkit**

An aid to support practitioners in naming and applying the values that matter in our situations, thereby practicing an ethical library assessment.

# Research Methods

Step	Research Method	Toolkit Development
1.	Literature Analysis	Deriving characteristics of ethical assessment
2.	Survey	Developing the toolkit
3.	Interviews	Validating the toolkit

# Step 1: Literature Review

**1a.** History of ethics and values in Library and Information Science

**1b.** Ethical dilemmas that are relevant to assessment

**1c.** Existing practices for supporting an ethical assessment

# Step 1: Literature Review

## 1a. Ethics and values in Library and Information Science

I first found that values and ethics have a deep history in LIS, with **practical ethics** and **applied values** being the most commonly-understood ethical lens for our field.

**Many different values are potentially relevant** for practitioners according to various contextual factors.

# **On Ethical Assessment: Locating and Applying the Core Values of Library and Information Science**

Scott W. H. Young  
Montana State University, USA

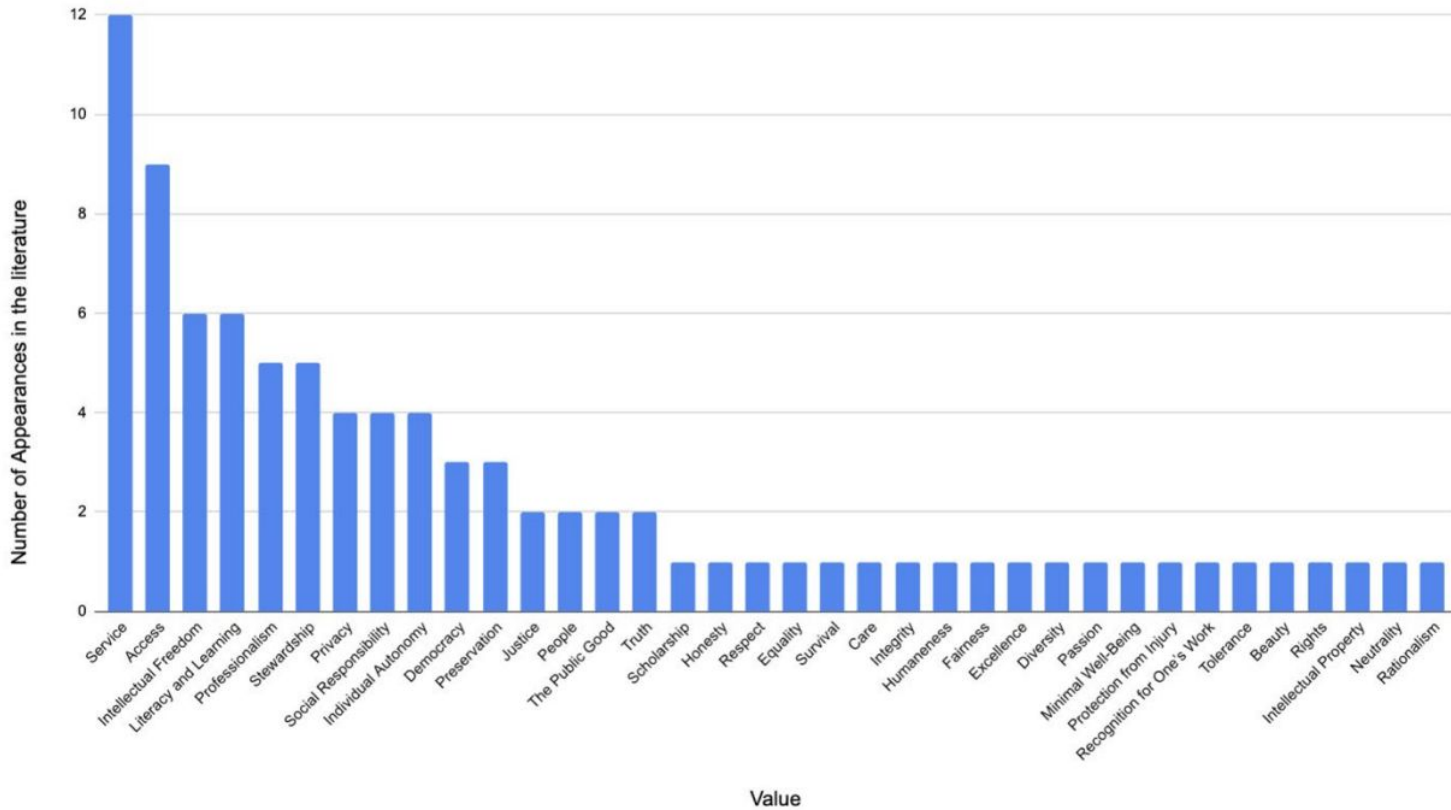
## **Introduction**

In this paper, I provide a brief history of the development of values within Library and Information Studies (LIS), drawing on the literature of LIS, sociology, professionalism, value studies, and practical ethics. I begin by tracing the outlines of professional identity as a way of staking out a claim to values. I then turn to the definition and purpose of values, before enumerating the main values present in the LIS literature. Finally, I present an overview of the contemporary conversation and practical applications related to values, focusing on the American Library Association (ALA) Core Values of Librarianship.

[libraryassessment.org/wp-content/uploads/2021/06/87-Young-On-Ethical-Assessment.pdf](https://libraryassessment.org/wp-content/uploads/2021/06/87-Young-On-Ethical-Assessment.pdf)

**Figure 1. LIS values as represented in the literature, 1931–2003**

LIS Values as represented in LIS literature, 1931-2003



# Step 1: Literature Review

## 1b. Ethical dilemmas that are relevant to assessment

I found a number of sites of tension that practitioners confront in their work:

- Value and impact studies
- Technology and privacy
- Learning analytics
- Social responsibility
- Critical librarianship
- Cataloging and classification

# Step 1: Literature Review

## **1c. Existing practices for supporting an ethical assessment**

I then conducted a third round of literature review that revealed common characteristics present in assessment practices that explicitly seek to resolve the tensions found in the prior step. This inductive analysis produced a group of five practice areas for ethical assessment, along with a set of characteristics shared across these practices.

This analysis informed the survey design.



# Step 2: Survey

# Step 2: Survey

In order to more fully understand ethical dilemmas and values-driven decision-making in library assessment, I conducted a scenario-based survey of practitioners (n=78).

I analyzed survey data using constructivist grounded theory, generating a set of codes that resulted in an initial toolkit for ethical assessment.

# Step 2: Survey

Ethical Topics	Vignette
Learning Analytics and Student Success	The assessment librarian maintains anonymous student data related to library gate counts. University administration has requested that the library begin identifying this data using card swipe records, and then share the data into a centralized learning analytics data warehouse. University administration would analyze the data and develop interventions with students to improve retention. But the assessment librarian is concerned that this approach doesn't reflect library professional values, and considers raising an objection. Still, the librarian feels a sense of commitment to the institution, and ultimately decides to identify and share the data.

# Step 2: Survey

Ethical Topics	Vignette
Learning Analytics and Student Success	The assessment librarian gate counts. University ac identifying this data using centralized learning analy analyze the data and dev retention. But the assess doesn't reflect library pro Still, the librarian feels a s ultimately decides to ide

Alignment

Transparency

Justice

Validity

Communication

to library  
begin  
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ection.

# Step 3: Interviews

I interviewed a subset of the survey sample (n=12) to validate the toolkit. I applied a visual elicitation approach in conducting intensive, semi-structured interviews.

This resulted in a final, revised toolkit for practicing ethical library assessment.

# Main Findings

**Ethical Complexity**

**Locating Values**

**The Toolkit**

# Main Findings

## Ethical Complexity

Assessment practitioners operate in a complex and decentralized values landscape that offers many competing choices for identifying and implementing values.

Local idiosyncrasies call for local solutions.

## Locating Values

## The Toolkit

# Main Findings

## Ethical Complexity

Assessment practitioners operate in a complex and decentralized values landscape that offers many competing choices for identifying and implementing values.

Local idiosyncrasies call for local solutions.

## Locating Values

Practitioners seek an ethical practice.

To achieve an ethical practice, we can articulate and enact a set of values that are meaningful to our practice.

## The Toolkit



# Main Findings

## Ethical Complexity

Assessment practitioners operate in a complex and decentralized values landscape that offers many competing choices for identifying and implementing values.

Local idiosyncrasies call for local solutions

## Locating Values

Practitioners seek an ethical practice.

To achieve an ethical practice, we can articulate and enact a set of values that are meaningful to our practice.

## The Toolkit

Drawing on the tradition of participatory design, the toolkit operationalizes the research data to help practitioners identify and choose which values to apply in different situations

The goal is to center values in the practice of library assessment.

Coming Fall 2023



**Young SWH.** *Knowing our Value and our Values:  
Toward An Ethical Practice of Library Assessment.*  
Sacramento, CA: Library Juice Press.

# The Values of Library Assessment

Alignment

Care

Collaboration

Communication

Imagining Otherwise

Justice

Positionality

Stewardship

Transparency

Validity

**Value-Sensitive Library Assessment Toolkit**

**Overview**  
This toolkit is designed to give you flexibility about how you conduct your assessment. You can use the entire toolkit, or you can choose to use only the parts that are most relevant to your needs. The toolkit is organized into sections that correspond to the different stages of the assessment process.

**The Value Cards**  
The Value Cards are a set of 14 cards that describe the values that inform the assessment process. They are organized into four groups: Library Values, Stakeholder Values, Community Values, and Professional Values. Each card includes a brief description of the value and a list of related practices.

**PDF** 0 - Overview Card.pdf

**Alignment**

**Reflective Prompts**

How can shared values help bring together collaborators and stakeholders?

How can an assessment project advance strategic priorities of the library, or how does the project enact relevant values?

**Description**  
Connecting assessment work to existing plans or statements, including organizational mission statements, strategic priorities, or professional values.

**Practitioner Quote**  
"This is an iterative process."

**PDF** 1 - Value Card - Alignment...

**Care**

**Reflective Prompts**

How would you describe your responsibility to the different stakeholders of the assessment, especially the participants? How will you know that you've fulfilled your responsibility?

How does the assessment account for the well-being of participants and collaborators?

What kind of harms could result from this work? How could those harms be mitigated?

**Description**  
Maximizing well-being, while minimizing harm.

**Practitioner Quote**  
"Respects participants of the..."

**PDF** 2 - Value Card - Care.pdf

**Collaboration**

**Reflective Prompts**

How does the project involve collaborators and participants?

How does your approach to collaboration and relationship-building support mutual benefit and trust among stakeholders? Stakeholders can include students, campus collaborators, community members, or other assessment participants.

**Description**  
Working together to build and sustain mutually beneficial relationships.

**Practitioner Quote**  
"The best time to fail is..."

**PDF** 3 - Value Card - Collaborati...

**Communication**

**Reflective Prompts**

How will project results be shared out to others, such as administrators, collaborators, and the wider institutional community?

Are you communicating the assessment in a way that gives different audiences key take-aways?

What story are you telling with the data? What is the most striking evidence from the assessment, or the most compelling message being communicated? What other findings are available?

Would the project report benefit from including a fuller narrative of practices, activities, and impacts, including a risk/benefit analysis?

**Description**  
"Closing the loop" of assessment by communicating an assessment and its results to relevant audiences.

**Practitioner Quote**  
"Don't do research without a plan."

**PDF** 4 - Value Card - Communic...

**Imagining Otherwise**

**Reflective Prompts**

How will the assessment project generate engagement or change? Who is responsible for leading that change, and who benefits from that change?

Can the assessment project be made stronger by introducing alternative or complementary methods?

If a third-party vendor is involved, can you work with the vendor for terms more reflective of library values, or can you change vendors?

**Description**  
Imagining and embracing different approaches to assessment, and ensuring that results support change.

**Practitioner Quote**  
"We need to be intentional..."

**PDF** 5 - Value Card - Imagining ...

**Justice**

**Reflective Prompts**

Do stakeholders and participants receive equitable, meaningful, research questions, methods, representation of data, and the application of results?

Does the project result in social or mutual benefits for participants and collaborators?

How does the project engage with structural racism/regret?

Does the project support social justice outcomes?

**Description**  
Diversity, inclusion, equity, and allyship.

**Practitioner Quote**  
"It would be useful to center students' voices and identify their experiences at all corners of the assessment, and to..."

**PDF** 6 - Value Card - Justice.pdf

**Positionality**

**Reflective Prompts**

Is the project guided or supported by explicit values? Does the project assess the achievement of those values?

In the context of the assessment, where do you have power? Who has power over you? How do those power dynamics affect your ability to articulate and enact values?

Based on your relative positions, what assumptions are you and others bringing to the project?

Does the assessment project include dedicated time for self-reflection?

**Description**  
Acknowledging perspectives, positions, and power.

**Practitioner Quote**  
"All choices are grounded in a set..."

**PDF** 7 - Value Card - Positionalit...

**Stewardship**

**Reflective Prompts**

Does the project account for longer-term impacts in budget, staffing needs, and community relationship building?

If there are resource constraints, how can the project be scoped so that the assessment is comparable?

What policies or practices govern the collection, retention, usage, and sharing of assessment-related data?

**Description**  
Ensuring that an assessment reflects organizational capacities—including staffing models, budgetary considerations, and data management and retention.

**Practitioner Quote**  
"What's possible, given the right..."

**PDF** 8 - Value Card - Stewardsh...

**Transparency**

**Reflective Prompts**

Does your assessment practice include documentation, including process, results, application, and decision-making?

How will project documentation and results be shared back with participants?

Are participants able to opt in or out, and are they able to provide informed consent?

**Description**  
Clear communication to participants about how data is collected, analyzed, and applied, with choices for participation.

**Practitioner Quote**  
"It would ensure that all participants are..."

**PDF** 9 - Value Card - Transpare...

**Validity**

**Reflective Prompts**

Is there a strong match among research question, assessment method, the assessment population or service, and the intended result?

Can the research question be answered by the method(s) that you are applying? Could a different method answer the question in a better way?

**Description**  
Ensuring that an assessment is valid, especially focusing on a tight fit between research question and research method.

**Practitioner Quote**  
"The most common problem with validity is..."

**PDF** 10 - Value Card - Validity.pdf

**Value**

**Reflective Prompts**

**Description**

**PDF** 11 - Value Card - Blank.pdf

**Connect Two**

**Goal**  
To connect your assessment to the university's strategic plan.

**How to achieve this goal:**

1. Review the university's strategic plan and identify the relevant goals and outcomes.
2. Review the assessment's goals and outcomes and identify the relevant goals and outcomes.
3. Identify the assessment's goals and outcomes that align with the university's strategic plan.
4. Review the assessment's goals and outcomes and identify the relevant goals and outcomes.
5. Review the assessment's goals and outcomes and identify the relevant goals and outcomes.

**PDF** 12 - Exercise Card - Conne...

**Must-Haves**

**Goal**  
To generate different values.

**How to achieve this goal:**

1. Identify an assessment project or program that is aligned with the university's strategic plan.
2. Review the full set of Value Cards and identify the relevant cards that align with the project or program.
3. List the relevant cards and identify the relevant goals and outcomes.
4. Review the assessment's goals and outcomes and identify the relevant goals and outcomes.
5. Review the assessment's goals and outcomes and identify the relevant goals and outcomes.

**PDF** 13 - Exercise Card - Must...

**Anchors and Sails**

**Goal**  
To identify how a value can be helped or hindered in implementation.

**How to achieve this goal:**

1. Review the university's strategic plan and identify the relevant goals and outcomes.
2. Review the assessment's goals and outcomes and identify the relevant goals and outcomes.
3. Identify the assessment's goals and outcomes that align with the university's strategic plan.
4. Review the assessment's goals and outcomes and identify the relevant goals and outcomes.
5. Review the assessment's goals and outcomes and identify the relevant goals and outcomes.

**PDF** 14 - Exercise Card - Ancho...

**Value-Sensitive Library Assessment Toolkit**

**Overview**  
This toolkit offers you an overview of the Value-Sensitive Library Assessment Toolkit, including the purpose of the assessment, the assessment process, and the assessment results. It also includes information on how to use the toolkit, including the Value-Sensitive Library Assessment Toolkit, the Value-Sensitive Library Assessment Toolkit, and the Value-Sensitive Library Assessment Toolkit.

**The Value Cards**  
The Value Cards are a set of 14 cards that provide a brief overview of the assessment process, including the purpose of the assessment, the assessment process, and the assessment results. Each card includes a brief description of the assessment process, a list of the assessment questions, and a list of the assessment results.

PDF 0 - Overview Card.pdf

**Alignment**

**Description**  
Connecting assessment work to existing plans or statements, including organizational mission statements, strategic priorities, or professional values.

**Practitioner Quote**  
"This is an essential piece."

PDF 1 - Value Card - Alignment...

**Reflective Prompts**

How can shared values help bring together collaborators and stakeholders?  
How can an assessment project advance strategic priorities of the library, or how does the project enact relevant values?

**Care**

**Description**  
Maximizing well-being, while minimizing harm.

**Practitioner Quote**  
"Respects participants of the..."

PDF 2 - Value Card - Care.pdf

**Reflective Prompts**

How would you describe your responsibility to the different stakeholders of the assessment, especially the participants? How well do you know that you've fulfilled your responsibility?  
How does the assessment account for the well-being of participants and collaborators?  
What kind of harms could result from this work? How could those harms be mitigated?

**Collaboration**

**Description**  
Working together to build and sustain mutually beneficial relationships.

**Practitioner Quote**  
"The best time to fail is..."

PDF 3 - Value Card - Collaborati...

**Reflective Prompts**

How does the project involve collaborators and partners?  
How does your approach to collaboration and relationship-building support mutual benefit and trust among stakeholders? Stakeholders can include students, campus collaborators, community members, or other assessment participants.

**Communication**

**Description**  
"Closing the loop" of assessment by communicating an assessment and its results to relevant audiences.

**Practitioner Quote**  
"Check the research without a plan..."

PDF 4 - Value Card - Communic...

**Reflective Prompts**

How will project results be shared out to others, such as librarians, collaborators, and the wider professional community?  
Are you communicating the assessment in a way that gives different audiences the most understanding?  
What story are you telling with the data? What is the most impactful evidence from the assessment, or the most dominant message being communicated? What other findings are available?  
Would the project report benefit from including a fuller narrative of practices, activities, and impacts, including a stakeholder analysis, or a stakeholder analysis?

**Imagining Otherwise**

**Description**  
Imagining and embracing different approaches to assessment, and ensuring that results support change.

**Practitioner Quote**  
"We are not just assessing..."

PDF 5 - Value Card - Imagining Otherwise

**Reflective Prompts**

How does the assessment account for the well-being of participants and collaborators?  
What kind of harms could result from this work? How could those harms be mitigated?

**Justice**

**Description**  
Ensuring that the assessment process is fair and equitable for all participants and collaborators.

PDF 6 - Value Card - Justice.pdf

**Reflective Prompts**

How does the assessment account for the well-being of participants and collaborators?  
What kind of harms could result from this work? How could those harms be mitigated?

**Positionality**

**Description**  
Acknowledging and reflecting on the influence of one's own perspective and biases on the assessment process.

PDF 7 - Value Card - Positionalit...

**Stewardship**

**Description**  
Using the assessment process to promote the well-being of the library and its stakeholders.

PDF 8 - Value Card - Stewardsh...

**Transparency**

**Description**  
Being open and honest about the assessment process and its results.

PDF 9 - Value Card - Transpare...

**Validity**

**Description**  
Ensuring that an assessment is valid, especially focusing on a "right fit" between research question and research method.

**Practitioner Quote**  
"We are not just assessing..."

PDF 10 - Value Card - Validity.pdf

**Reflective Prompts**

Is there a strong match among research question, assessment method, the assessment population or service, and the intended result?  
Can the research question be answered by the method(s) that you are applying? Could a different method answer the question in a better way?

**Blank**

**Description**

PDF 11 - Value Card - Blank.pdf

**Reflective Prompts**

**Connect Two**

**Description**  
This exercise asks you to connect two of the assessment questions to each other. It is a great way to explore the relationships between the questions and to see how they can be used together to answer a research question. You will be asked to identify two assessment questions that you think are related and to explain how they can be used together to answer a research question. You will also be asked to identify two assessment questions that you think are not related and to explain why they are not related.

PDF 12 - Exercise Card - Conne...

**Must-Haves**

**Goal**  
To generate different values.

1. Identify an assessment project or program.  
2. Analyze the full set of Value Cards in a given section to that project or program.  
3. List the most important values that are missing from the project or program.  
4. Identify the assessment questions that are most likely to address the missing values and explain how they can be used together to answer a research question.

PDF 13 - Exercise Card - Must-...

**Anchors and Sails**

**Goal**  
To identify how a value can be applied or highlighted in an assessment.

1. Choose an assessment question or program.  
2. Identify a value from the Value Cards that is most relevant to the question or program.  
3. List the most important values that are missing from the project or program.  
4. Identify the assessment questions that are most likely to address the missing values and explain how they can be used together to answer a research question.

PDF 14 - Exercise Card - Ancho...

[tiny.cc/lac22toolkit](https://tiny.cc/lac22toolkit)

# Values-Sensitive Library Assessment Toolkit

## Overview

This toolkit aims to get you thinking about values in library assessment. The toolkit helps answer two main questions for values-sensitive assessment: First, which values are relevant for a given assessment? Then, once values have been identified, how can they be prioritized and implemented?

The toolkit is comprised of 10 Value Cards, 3 Exercise Cards, and this Instruction Card. All cards are numbered for ordering and reference. The toolkit was developed through a national study of library assessment practitioners.

## The Value Cards

The Value Cards each present a value relevant for library assessment. Each card includes a description of the value, a practitioner quote drawn from the research to illustrate the value, and a set of reflective prompts to guide practice. A blank template is included for expanding the values set to suit your unique context.

## The Exercise Cards

The Exercise Cards each present an activity for developing sensitivity to the values.

## Using the Toolkit

This toolkit can be used as a planning tool when designing a new assessment, as an evaluation tool when in the middle of an assessment or when looking back on a completed assessment, and as a teaching tool when learning about the practice of assessment.

To get started, first lay out all of the Value Cards to get a sense of the full set. Next, review the Exercise Cards. Each exercise is a tool that serves a specific purpose: *Connect Two* builds understanding of the values, *Must-Haves* sorts the values by priority, and *Anchors and Sails* reveals barriers and opportunities for implementing the values. The exercises can be completed one-by-one or sequenced together to form a cycle of values-sensitive assessment: defining, prioritizing, and implementing values.

After completing the exercises, the result is a ranked set of values relevant for a given project, with reflective prompts for putting those values into practice. The process can be repeated for different projects or at different times, as contextual factors change.

This toolkit represents just one model for values in assessment. Think of the cards as points of reference in developing your own values, practices, and meaning in assessment.

The toolkit is licensed CC BY, and may be accessed online at the following URL:  
[scottwhy.com/projects/assessment-toolkit](https://scottwhy.com/projects/assessment-toolkit)

# Alignment



## **Description**

Connecting assessment work to existing plans or statements, including organizational mission statements, strategic priorities, or professional values.

## **Practitioner Quote**

“This is my starting point. I always align with library goals and mission.”

1

# Reflective Prompts

How can shared values help bring together collaborators and stakeholders?

How can an assessment project advance strategic priorities of the library, or how does the project enact relevant values?

## Care



### **Description**

Maximizing well-being, while minimizing harm.

### **Practitioner Quote**

"Keeping participants at the center of the research is important."

2

## Reflective Prompts

How would you describe your responsibility to the different stakeholders of the assessment, especially the participants? How will you know that you've fulfilled your responsibility?

How does the assessment account for the well-being of participants and collaborators?

What kind of harms could result from this work? How could those harms be mitigated?



# Collaboration



## **Description**

Working together to build and sustain mutually beneficial relationships.

## **Practitioner Quote**

“The best time to foster a relationship with an important user community is before now; now is the next best time.”

3

# Reflective Prompts

How does the project involve collaborators and partnerships?

How does your approach to collaboration and relationship-building support mutual benefit and trust among stakeholders? Stakeholders can include students, campus collaborators, community members, or other assessment participants.

## Communication



### **Description**

“Closing the loop” of assessment by communicating an assessment and its results to relevant audiences.

### **Practitioner Quote**

“Don’t do research without a plan to communicate your research.”

4

## Reflective Prompts

How will project results be shared out to others, such as administrators, collaborators, and the wider professional community?

Are you communicating the assessment in a way that your different audiences can each understand?

What story are you telling with the data? What is the most readily-available reading of the assessment, or the most dominant narrative driving interpretation? What other readings are available?

Would the project report benefit from including a fuller landscape of measures, activities, and impacts, including a risk/benefit analysis, social impacts, or any other contextual factor that helps explain or situate the assessment?

## Imagining Otherwise



### **Description**

Imagining and embracing different approaches to assessment, and ensuring that results support change.

### **Practitioner Quote**

"I'm always questioning—  
why do we do things this way?"

5

## Reflective Prompts

How will the assessment project generate improvement or change? Who is responsible for leading that change, and who benefits from that change?

Can the assessment project be made stronger by introducing alternative or complementary methods?

If a third-party vendor is involved, can you work with the vendor for terms more reflective of library values, or can you change vendors?

## Justice



### **Description**

Diversity, inclusion, equity, and allyship.

### **Practitioner Quote**

"I would be careful to center students' voices and students' lived experiences at the center of the assessment and to make sure I was using inclusive and culturally respectful forms of data collection and analysis for this work."

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## Reflective Prompts

Do stakeholders and participants have a voice in determining research questions, methods, interpretation of data, and the application of results?

Does the project result in social or material benefits for participants and collaborators?

How does the project engage with structural social inequalities?

Does the project support social justice outcomes?

## Positionality



### **Description**

Acknowledging perspectives, positions, and power

### **Practitioner Quote**

"All choices are grounded in (a set of) values. Any choice we make is a choice between values."

7

## Reflective Prompts

Is the project guided or supported by explicit values? Does the project assess the achievement of those values?

In the context of this assessment, over whom do you have power? Who has power over you? How do those power dynamics affect your ability to articulate and enact values?

Based on your relative positions, what assumptions are you and others bringing to the project?

Does the assessment project include dedicated time for self-reflection?

## Stewardship



### **Description**

Ensuring that an assessment reflects organizational capacities—including staffing models, budgetary considerations, and data management and retention.

### **Practitioner Quote**

“What’s possible, given the right resources?”

8

## Reflective Prompts

Does the project account for longer-term impacts in budget, staffing needs, and community relationship-building?

If there are resource constraints, how can the project be scoped so that the assessment is completable?

What policies or practices govern the collection, retention, usage, and sharing of assessment-related data?

## Transparency



### **Description**

Clear communication to participants about how data is collected, analyzed, and applied, with choices for participation.

### **Practitioner Quote**

"I would ensure that all participants are fully informed of what they're consenting to and conduct testing in a way that minimizes harm."

9

## Reflective Prompts

Does your assessment practice include documentation, including process, result, application, and decision-making?

How will project documentation and results be shared back with participants?

Are participants able to opt in or out, and are they able to provide informed consent?

# Validity



## **Description**

Ensuring that an assessment is valid, especially focusing on a right fit between research question and research method.

## **Practitioner Quote**

"I would try to base the decision about whether to run an assessment on what specific metrics I'm being asked to gather and summarize, whether those metrics match the research question of the person requesting the assessment, and whether I can gather those metrics reliably and accurately."

10

# Reflective Prompts

Is there a strong match among research question, assessment method, the assessment population or service, and the intended result?

Can the research question be answered by the method(s) that you are applying? Could a different method answer the question in a better way?



<b><u>Value</u></b>
<b>Description</b>

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<b>Reflective Prompts</b>

# Connect Two



**Goal:** To connect your views with the values, and to connect values with each other

**1.** This exercise may be completed individually or as a group. In the case of a group, first convene the stakeholders for a given assessment.

**2.** Shuffle the Value Cards. Then select two cards at random. Review the cards, and reflect on the values. On a piece of paper, write one sentence to describe what each value means to you, based on your own experience. Then consider the interrelation of these values—how do they complement or conflict with each other?

**3a.** If working individually, move ahead to Step 4.

**3b.** If working as a group, break into pairs. In pairs, take a few minutes to share what you produced in Step 2, noting similarities or differences in your experiences. Then reconvene as a full group.

**4.** Reflect on and share your personal interpretations of the values. Record any additional notes during this step.

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## Connect Two



**Goal:** To connect your views with the values, and to connect values with each other

1. This exercise may be completed individually or as a group. In the case of a group, first convene the stakeholders for a given assessment.
2. Shuffle the Value Cards. Then select two cards at random. Review the cards, and reflect on the values. On a piece of paper, write one sentence to describe what each value means to you, based on your own experience. Then consider the interrelation of these values—how do they complement or conflict with each other?
- 3a. If working individually, move ahead to Step 4.
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4. Reflect on and share your personal interpretations of the values. Record any additional notes during this step.

12

## Must-Haves



**Goal:** To prioritize different values

1. Identify an assessment project or program to serve as the subject of this exercise.
2. Arrange the full set of Value Cards on a tabletop surface so that all cards are visible.
3. Sort the Value Cards into the following categories. Aim to have no more than 3 or 4 values in any category.
  - Must have:* values that are highly relevant and need to be implemented to have a successful project or program
  - Could have:* values that are important but not critical
  - Could do without:* values that are not so important or relevant to the assessment
  - Would like but won't get:* values that might be too difficult to implement
4. Reflect on and discuss the categories.

13

## Connect Two



**Goal:** To connect your views with the values, and to connect values with each other

**1.** This exercise may be completed individually or as a group. In the case of a group, first convene the stakeholders for a given assessment.

**2.** Shuffle the Value Cards. Then select two cards at random. Review the cards, and reflect on the values. On a piece of paper, write one sentence to describe what each value means to you, based on your own experience. Then consider the interrelation of these values—how do they complement or conflict with each other?

**3a.** If working individually, move ahead to Step 4.

**3b.** If working as a group, break into pairs. In pairs, take a few minutes to share what you produced in Step 2, noting similarities or differences in your experiences. Then reconvene as a full group.

**4.** Reflect on and share your personal interpretations of the values. Record any additional notes during this step.

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## Must-Haves



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**4.** Reflect on and discuss the categories.

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## Anchors and Sails



**Goal:** To identify how a value can be helped or hindered in implementation

**1.** Choose a Value Card that represents a must-have value for a given assessment project. Reflect on why this value is important to the assessment.

**2.** On a piece of paper or on a whiteboard, draw a boat, and name the boat after the Value.

**3.** Consider aspects of the project that help or hinder the value. Begin drawing anchors and sails that attach to the boat. Each anchor represents an obstacle in implementing the value. Each sail represents a supporting factor for achieving that value. There can be as many anchors and sails as relevant for the project.

**4.** Reflect on and discuss the anchors and sails, and their effect on the boat. The boat can be a reference for the project moving forward—are the sails being activated and are the anchors being addressed?

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### Value-Sensitive Library Assessment Toolkit

**Overview**  
This toolkit can get you started with assessing your library's values. It includes a list of values, a list of questions to ask, and a list of resources to help you get started.

**The Value Cards**  
This toolkit includes a set of value cards that you can use to assess your library's values. Each card includes a definition of the value, a list of questions to ask, and a list of resources to help you get started.

**Practitioner Quote**  
"This is an iterative process."

PDF 0 - Overview Card.pdf

### Alignment



**Description**  
Connecting assessment work to existing plans or statements, including organizational mission statements, strategic priorities, or professional values.

**Practitioner Quote**  
"This is an iterative process."


PDF 1 - Value Card - Alignment...

### Reflective Prompts

How can shared values help bring together collaborators and stakeholders?

How can an assessment project advance strategic priorities of the library, or how does the project enact relevant values?

### Care



**Description**  
Maximizing well-being, while minimizing harm.

**Practitioner Quote**  
"Respects participants of the..."

PDF 2 - Value Card - Care.pdf

### Reflective Prompts

How would you describe your responsibility to the different stakeholders of the assessment, especially the participants? How will you know that you've fulfilled your responsibility?

How does the assessment account for the well-being of participants and collaborators?

What kind of harms could result from this work? How could those harms be mitigated?

### Collaboration



**Description**  
Working together to build and sustain mutually beneficial relationships.

**Practitioner Quote**  
"The best time to start is..."


PDF 3 - Value Card - Collaborati...

### Reflective Prompts

How does the project involve collaborators and partners?

How does your approach to collaboration and relationship-building support mutual benefit and trust among stakeholders? Stakeholders can include students, campus collaborators, community members, or other assessment participants.

### Communication



**Description**  
"Closing the loop" of assessment by communicating an assessment and its results to relevant audiences.

**Practitioner Quote**  
"Check on research without a plan..."

PDF 4 - Value Card - Communic...

### Reflective Prompts


How will project results be shared out to others, such as administrators, collaborators, and the wider institutional community?

Are you communicating the assessment in a way that gives different audiences best access to understand?

What story are you telling with the data? What is the most striking evidence from the assessment, or the most compelling message being interpreted? What other findings are available?

Would the project report benefit from including a fuller narrative of practices, activities, and impacts, including a risk/benefit analysis?

### Imagining Otherwise



**Description**  
Imagining and embracing different approaches to assessment, and ensuring that results support change.

**Practitioner Quote**  
"This is an iterative process..."

PDF 5 - Value Card - Imagining ...

### Reflective Prompts

How will the assessment project generate engagement or change? Who is responsible for leading that change, and who benefits from that change?

Can the assessment project be made stronger by introducing alternative or complementary methods?

If a third-party vendor is involved, can you work with the vendor for terms more reflective of library values, or can you change vendors?

### Justice



**Description**  
Diversity, inclusion, equity, and allyship.

**Practitioner Quote**  
"It would be useful to center students' voices and identify their experiences at the center of the assessment and to..."

PDF 6 - Value Card - Justice.pdf

### Reflective Prompts

Do stakeholders and participants have a voice in determining research questions, methods, interpretation of data, and the application of results?

Does the project result in asset or mutual benefits for participants and collaborators?

How does the project engage with structural racism/regret?

Does the project support social justice outcomes?

### Positionality



**Description**  
Acknowledging perspectives, positions, and power.

**Practitioner Quote**  
"All choices are grounded in a set..."

PDF 7 - Value Card - Positionalit...

### Reflective Prompts

Is the project guided or supported by explicit values? Does the project assess the achievement of those values?

In the context of the assessment, where do you have power? Who has power over you? How do those power dynamics affect your ability to articulate and enact values?

Based on your relative positions, what assumptions are you and others bringing to the project?

Does the assessment project include dedicated time for self-reflection?

### Stewardship



**Description**  
Ensuring that an assessment reflects organizational capacities—including staffing models, budgetary considerations, and data management and retention.

**Practitioner Quote**  
"What's possible, given the right..."

PDF 8 - Value Card - Stewardsh...


### Reflective Prompts

Does the project account for longer-term impacts in budget, staffing needs, and community relationship-making?

If there are resource constraints, how can the project be scoped so that the assessment is comparable?

What policies or practices govern the collection, retention, usage, and sharing of assessment-related data?

### Transparency



**Description**  
Clear communication to participants about how data is collected, analyzed, and applied, with choices for participation.

**Practitioner Quote**  
"It would ensure that all participants are..."

PDF 9 - Value Card - Transpare...

### Reflective Prompts

Does your assessment practice include documentation, including process, results, application, and decision-making?

How will project documentation and results be shared back with participants?

Are participants able to opt in or out, and are they able to provide informed consent?

### Validity



**Description**  
Ensuring that an assessment is valid, especially focusing on a tight fit between research question and research method.

**Practitioner Quote**  
"This is an iterative process..."


PDF 10 - Value Card - Validity.pdf

### Reflective Prompts

Is there a strong match among research question, assessment method, the assessment population or service, and the intended result?

Can the research question be answered by the method(s) that you are applying? Could a different method answer the question in a better way?

### Value



**Description**

PDF 11 - Value Card - Blank.pdf

### Reflective Prompts

### Connect Two



**Goal**  
To connect your assessment to the university's strategic plan and other relevant documents.

**Instructions**  
1. Identify an assessment project or program that aligns with one of the university's strategic priorities.  
2. Study the goal(s) that you want to connect to the assessment. How do you think the assessment can help you achieve that goal?  
3. Write a short paragraph (3-5 sentences) describing how the assessment can help you achieve that goal.  
4. Share your paragraph with a peer or mentor for feedback.

PDF 12 - Exercise Card - Conne...

### Must-Haves



**Goal**  
To generate different values.

**Instructions**  
1. Identify an assessment project or program that aligns with one of the university's strategic priorities.  
2. Analyze the full set of library values and determine which ones are most relevant to the assessment.  
3. List the values that are most relevant to the assessment.  
4. Write a short paragraph (3-5 sentences) describing how the assessment can help you achieve that goal.

PDF 13 - Exercise Card - Must...

### Anchors and Sails



**Goal**  
To identify how a value can be helped or hindered in implementation.

**Instructions**  
1. Identify an assessment project or program that aligns with one of the university's strategic priorities.  
2. Analyze the full set of library values and determine which ones are most relevant to the assessment.  
3. List the values that are most relevant to the assessment.  
4. Write a short paragraph (3-5 sentences) describing how the assessment can help you achieve that goal.

PDF 14 - Exercise Card - Ancho...

# Activity 1 of 3

## Connect Two

Getting to know the values

[tiny.cc/lac22toolkit](https://tiny.cc/lac22toolkit)

## Connect Two



**Goal:** To connect your views with the values, and to connect values with each other

1. This exercise may be completed individually or as a group. In the case of a group, first convene the stakeholders for a given assessment.
2. Shuffle the Value Cards. Then select two cards at random. Review the cards, and reflect on the values. On a piece of paper, write one sentence to describe what each value means to you, based on your own experience. Then consider the interrelation of these values—how do they complement or conflict with each other?
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## Connect Two — 10 minutes

**Goal:** To connect your views with the values, and to connect values with each other

1. Shuffle the Value Cards. Then select two cards at random. Review the cards, and reflect on the values. On a piece of paper, write one sentence to describe what each value means to you, based on your own experience. Then consider the interrelation of these values—how do they complement or conflict with each other?
2. Reflect on your personal interpretations of the values. Record any additional notes during this step.

**Reflective Prompts:** What is challenging about the activity? What is surprising? What questions come up? What ideas are sparking or what insights are forming?

# Activity 2 of 3

## Must-haves

### Prioritizing the values

[tiny.cc/lac22toolkit](https://tiny.cc/lac22toolkit)

## Must-Haves



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2. Arrange the full set of Value Cards on a tabletop surface so that all cards are visible.
3. Sort the Value Cards into the following categories. Aim to have no more than 3 or 4 values in any category.

*Must have:* values that are highly relevant and need to be implemented to have a successful project or program

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*Would like but won't get:* values that might be too difficult to implement

4. Reflect on and discuss the categories.

13



# Must Haves — 10 minutes

**Goal:** To prioritize different values

1. Identify an assessment project or program to serve as the subject of this exercise.
2. Arrange the full set of Value Cards on a tabletop surface or in the web browser so that all cards are visible
3. Sort the Value Cards into the following categories by arranging them on the table or by writing the values into categories in a separate piece of paper. Aim to have no more than 3 or 4 values in any category.

*Must have:* values that are highly relevant and need to be implemented to have a successful project or program

*Could have:* values that are important but not critical

*Could do without:* values that are not so important or relevant to the assessment

*Would like but won't get:* values that might be too difficult to implement

4. Reflect on the categories.

**Reflective Prompts:** What is challenging about the activity? What is surprising? What questions come up? What ideas are sparking or what insights are forming?

# Activity 3 of 3

## Anchors and Sails

Implementing the values

[tiny.cc/lac22toolkit](https://tiny.cc/lac22toolkit)

### Anchors and Sails



**Goal:** To identify how a value can be helped or hindered in implementation

1. Choose a Value Card that represents a must-have value for a given assessment project. Reflect on why this value is important to the assessment.
2. On a piece of paper or on a whiteboard, draw a boat, and name the boat after the Value.
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# Anchors and Sails — 10 minutes

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**Reflective Prompts:** What is challenging about the activity? What is surprising? What questions come up? What ideas are sparking or what insights are forming?

# Breakout Groups — 15 minutes

In small groups, discuss the three activities and share what you each produced.

Identify **one key question** and **one key insight** about the toolkit operation or the topic of ethical assessment. We'll have time to share with the full group at the end.

# Wrap-up

Questions, discussion, next steps for using the toolkit

[scottwhyong.com/projects/assessment-toolkit](https://scottwhyong.com/projects/assessment-toolkit)

Introducing the  
*Values-Sensitive Library Assessment Toolkit*  
A Practical Approach for Ethical Assessment

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Thank you!

# Limitations

## **Sampling**

Limited geographically

Participants self-selected  
into ethical inquiry

## **Toolkit Design**

Accessibility

Relies on trust and communication

It looks like a game

## **Scope**

This is just one view on  
ethics, and must compete  
with local priorities

## **Positionality**

My personal views affect  
the values and practices  
that are represented in the  
toolkit

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