This course provides an opportunity for an investigation of quantitative and qualitative methods used to plan and evaluate the effectiveness of library services. Planning and evaluation methodologies will be analyzed and critiqued. Selected methods will be demonstrated and/or utilized.

The course will introduce students to a variety of evaluation frameworks, and what is necessary to engage in the evaluation of a range of information services. More specifically, the course will:

- Provide a critical assessment of selected evaluation approaches and frameworks;
- Offer both quantitative and qualitative methodological techniques for engaging in evaluation efforts;
- Assist in the development of evaluation planning and implementation;
- Help students assess the strengths, weaknesses, and trade-offs involved in evaluation activities;
- Provide a context for evaluation activities and the interpretation of evaluation results; and
- Provide an understanding of organizational, staffing, and a range of other requirements for effective evaluation efforts.

At the completion of the course, students should be able to:

- Understand issues associated with planning and implementing evaluation strategies;
- Understand the implications and results based on the use of selected evaluation frameworks;
- Understand the organizational, personnel, and other requirements for effective evaluation efforts;
• Understand the relationship between evaluation frameworks, methodologies, and evaluation results; and

• Engage in evaluation efforts using multiple methodologies.

This course is designed as an evaluation primer. Thus, students will be exposed to a number of evaluation strategies, literature, and methods. Given the breadth and depth of a number of these evaluation approaches, it will not be possible to cover all aspects throughout the course. Evaluation has a long history in the field of library science. The class will offer both an historical and current perspective on the assessment of information services, with an emphasis on current practice in libraries and information organizations.

WEBSITE AND INSTRUCTOR

Course material and other items are available on the class BlackBoard site.

The course instructor is Dr. John Carlo Bertot. Bertot is a professor in the College of Information Studies at the University of Maryland College Park, where he serves as Director of the newly formed Center for Library Innovation. He serves as editor of the journal Government Information Quarterly, and co-editor of Library Quarterly. Bertot has conducted a range of evaluation projects, primarily in the areas of electronic library services. His contact information is:

Dr. John Carlo Bertot
301.405.3267: phone
<jbertot@umd.edu>: e-mail

REQUIRED TEXTS AND OTHER ITEMS:

The required text for this course is:


The text serves as a good primer on evaluation. It is, however, not exhaustive or complete, particularly in the area of electronic services.

The course will have a number of supplemental readings that will be available to you through e-reserves and the course website.

You will also need the following to access course content:

• Apple QuickTime Player, available at http://www.apple.com/quicktime/. From time to time, I upload video lectures/content using QuickTime. You only need the freely
available player.
- MP3 Player (e.g., iTunes, RealPlayer, iPod, other). I record lectures using the MP3 format for maximum portability.

DISABILITIES

The University has a legal obligation to provide accommodations for students with disabilities. Please inform me at the start of the semester if you have a physical or learning disability that will require accommodation. We will work with the staff at Disability Support Services (Counseling Center, 0126 Shoemaker Building 301-314-7561 or http://www.counseling.umd.edu/DSS/) to ensure that accommodations are made for you.

RELIGIOUS HOLIDAY OBSERVANCE

Please see the University’s policy regarding Assignments and Attendance on Dates of Religious Observance. http://www.faculty.umd.edu/teach/attendance.html#religious

ACADEMIC INTEGRITY INFORMATION

The University of Maryland, College Park has a nationally recognized Code of Academic Integrity, administered by the Student Honor Council. This Code sets standards for academic integrity at Maryland for all undergraduate and graduate students. As a student you are responsible for upholding these standards for this course. It is very important for you to be aware of the consequences of cheating, fabrication, facilitation, and plagiarism. For more information on the Code of Academic Integrity or the Student Honor Council, please visit http://www.shc.umd.edu. To further exhibit your commitment to academic integrity, remember to sign the Honor Pledge on all examinations and assignments: "I pledge on my honor that I have not given or received any unauthorized assistance on this examination (assignment)."

For more information, contact the Student Honor Council:

Mail:
Chair, Student Honor Council
2118 Mitchell Building
University of Maryland
College Park, MD 20742
Phone: 301/314-8204
Fax: 301/314-9533
E-mail: HonorCouncil@umd.edu
EVALUATION:

<table>
<thead>
<tr>
<th>Task</th>
<th>Percentage of Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participation</td>
<td>10%</td>
</tr>
<tr>
<td>Evaluation SWOTs (Strengths, Weaknesses, Opportunities, Threats) (total of 6 @ 15% each)</td>
<td>90%</td>
</tr>
</tbody>
</table>

Information regarding each assignment is on the course site. **Assignments are due the Thursday of each week.**

**Participation**

Participation means active involvement in class discussions. Students read the assigned readings for each week **PRIOR TO THAT WEEK.** The students are expected to question, challenge, argue, and discuss issues and topics related to that session’s readings. Merely posting a question or comment online is not sufficient to pass this evaluation criterion. Failure to participate in the course will result in a letter grade of F for this component.

If a student cannot participate in course discussions and activities for any period of time, it is the responsibility of the student to contact the instructor.

If a student has any special needs to participate in course activities/complete course requirements, please inform the instructor at the beginning of the course.

**WARNING:**

I read to the **fifth mistake**! After the fifth mistake, you will receive a letter grade of “C” for the assignment. You may resubmit the assignment. I consider the resubmission to be a total re-write and thus will **review the entire assignment again.** Mistakes include spelling, grammatical errors, and typos. **CAREFULLY** proof your work prior to submission.

Late papers will not be accepted unless there is a medical, religious or other agreed upon reason for the late assignment.

**CLASS ASSIGNMENTS**

The class assignments are a series of SWOT reports designed to assess evaluation frameworks, methodologies, and management issues regarding evaluation. **SWOTs** are not designed to be long in terms of writing, but rather are designed to provide a succinct analysis of a particular topic.
What is a SWOT?

A SWOT report is a particular form/analysis tool designed to assess the STRENGTHS, WEAKNESSES, OPPORTUNITIES, THREATS of a topic.

**STRENGTHS:** What is inherent to the evaluation strategy, approach, framework? What is its primary and overall strengths? What is it designed to do?

**WEAKNESSES:** What is inherent to the evaluation strategy, approach, framework that might hinder the success? Does it require a certain approach to work? What does it leave out? Are there any biases that may prevent success?

**OPPORTUNITIES:** What environmental/external factors exist that might be useful to successful development/implementation for the evaluation strategy, approach, framework? Is there a possibility that a new and important stakeholder might be recruited? Is there legislation pending that would make the system more of a priority? Could the information or the information system have a wider use or potential that originally anticipated?

**THREATS:** What is going on outside of the evaluation plan, strategy, framework that may sink the success of the evaluation? Are there dependencies on data collection, evaluation tools, etc., that are critical to the success of the evaluation approach?

Substantiate all of your SWOT analyses and assertions with written arguments based on research and practice.

SWOT reports are due on the Thursday of each week due (see below calendar).

The report should be 4 - 6 pages in length. It should also include a bibliography of all sources consulted to do the paper. It is expected that you will use journal articles, web sites, and other sources to complete your reports.

<table>
<thead>
<tr>
<th>SWOT REPORT CALENDAR</th>
<th>DUE DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staffing/Management/Organizational Readiness</td>
<td>Thursday, 9/25</td>
</tr>
<tr>
<td>Quantitative Methodologies</td>
<td>Thursday, 10/9</td>
</tr>
<tr>
<td>Qualitative Methodologies</td>
<td>Thursday, 10/23</td>
</tr>
<tr>
<td>Outcomes Assessment</td>
<td>Thursday, 11/6</td>
</tr>
<tr>
<td>E-metrics/Electronic Measures</td>
<td>Thursday, 11/20</td>
</tr>
<tr>
<td>Service Quality or Performance Measurement</td>
<td>Tuesday, 12/16</td>
</tr>
</tbody>
</table>
CLASS SESSIONS:

Please note that there are 15 weeks for this particular course. Below is our schedule. Given that this is an online class, we do not have holidays per se. In general, each class will have a recorded lecture and slide show.

Class discussion will occur via the course discussion boards. You will find topic area discussions that mirror the class lectures. There are questions posted for you to think over, research, consider as you complete the readings, and respond. Assessment of participation in the discussions is NOT based on quantity -- but rather your ability to integrate and look across multiple sources of information and discussions by your classmates. The discussions are designed to go beyond the readings.

The course is divided into four parts:

1. General overview of evaluation and evaluation planning. Why evaluate services?
2. Organizational, staffing, and other evaluation requirements. What does it take to engage in evaluation?
3. Research methodologies. What methods work best for which types of evaluation efforts? What are the tradeoffs that each methodology brings?
4. Evaluation frameworks and strategies. There are a number of research frameworks (outcomes, service quality, performance measurement, e-metrics): What do these frameworks capture and tell you about your information services? What are there strengths and weaknesses?

There is much ground to cover and we cannot cover each of these areas in-depth.

Week 1 - September 2

- **Topic**

  Introduction to Evaluation and Evaluation Planning

- **Readings**

  Matthews, Chapter 1 and Chapter 2

  Buckland (2003)

Week 2 - September 8

- **Topic**
Evaluation and Evaluation Planning (cont'd)

- **Readings**
  
  Bertot & Davis (2004), Chapter 1

**Week 3 – September 15**

- **Topic**
  
  Organizational and Staffing -- Getting Ready to Evaluate

- **Readings**
  
  Matthews, Chapter 3


**Week 4 – September 22**

- **Topic**
  
  Collecting Data: Overview

- **Readings**
  
  Matthews, Chapter 7

  Bertot & Davis, Chapter 3

- **Assignments**
  
  SWOT 1 - Staffing/Management/Organizational Readiness Due Thursday, 9/25

**Week 5 – SEPTEMBER 29**

- **Topic**
  
  Quantitative Data Collection and Tools

- **Readings**
  
  Matthews, Chapters 5 and 6
Week 6 – OCTOBER 6

- **Topic**
  Qualitative Data Collection and Tools

- **Readings**
  Matthews, Chapter 4

- **Assignments**
  SWOT 2 - Quantitative Methods Due Thursday, 10/9

Week 7 – OCTOBER 13

- **Topic**
  Outcomes Assessment

- **Readings**
  Matthews, Chapter 19
  Hernon & Dugan (2002)

Week 8 – OCTOBER 20

- **Topic**
  Outcomes Assessment (cont'd)

- **Readings**
  Saunders (2008)


- **Assignments**
SWOT 3 - Qualitative Methods Due Thursday, 10/23

Week 9 – OCTOBER 27

• **Topic**
  
  E-metrics and Electronic Measures

• **Readings**
  
  Matthews, Chapters 13 & 10 (sections related to digital reference)

  Marcum (2003)

Week 10 – NOVEMBER 3

• **Topic**
  
  E-metrics and Electronic Measures (cont'd)

• **Readings**
  
  Bertot & Davis, Chapters 4

• **Assignments**
  
  SWOT 4 - Outcomes Assessment Due Thursday, 11/6

Week 11 – NOVEMBER 10

• **Topic**
  
  Service Quality

• **Readings**
  
  Matthews Chapter 15

  Hernon (2002)

Week 12 – NOVEMBER 17

• **Topic**
  
  Service Quality/LibQUAL+
• **Readings**

Review ARL's LibQUAL+ site ([http://www.libqual.org/](http://www.libqual.org/))

Thompson, Kyrillidou, & Cook (2008)

• **Assignments**

SWOT 5 - E-metrics/Electronic Measures Due Thursday, 11/20

**Week 13 – NOVEMBER 24**

• **Topic**

Performance Measurement & Value

• **Readings**

Matthews Chapter 20

Poll (2008)

Booth (2006)

**Week 14 - DECEMBER 1**

• **Topic**

Performance Measurement & Library Value

• **Readings**

ISO 11620 - Library Performance Indicators

**Week 15 – DECEMBER 8**

• **Topic**

Wrap-up/time to work in final SWOT

**Week 16 – DECEMBER 15 (FINALS WEEK)**

• **Assignments**

SWOT 6 - Service Quality or Performance Measurement Due **Tuesday, 12/16**
Additional Readings for LBSC 713 – Planning and Evaluation of Information Services

These should be made available to you through the e-reserves on the course website. However, you may also get to many of these articles directly through the University of Maryland’s e-journal subscriptions (http://www.lib.umd.edu/) and follow the link to the Research Port (databases, journal articles, electronic journals).

- Library Trends is available through Ebsco’s MasterFile database.
- The Journal of Academic Librarianship is available through Elsevier’s ScienceDirect database.
- The Library Quarterly is available through the University of Chicago Press journal website.

If you go to the electronic journals area (after logging on), you may search by the journal title.

We do not subscribe to Emerald journals, thus I will make available to you the articles from the Performance Measurement and Metrics journal separately.


