In honor of F. W. Lancaster (1933-2013)

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Office hours: by appointment; I work full-time at the Association of Research Libraries in Washington DC (eastern time zone) and generally I am reachable by email and will respond and review your communication definitely by Sunday each week (if not earlier). I would like to hold a few (4-6) one hour synchronous sessions where we can have some live discussion and interact with some guest speakers. One of our first discussion threads will be on how to accomplish this; I look forward to getting some good advice from you on the best way to engage you in a synchronous way. I'm happy to schedule individual phone calls, or a skype session, or a google hangout session if you require more time.

Class period: September 3 - December 13
Class location: http://elms.umd.edu/

Course Description
This course is a review of quantitative and qualitative methods for planning and evaluating library and information services, including project planning and monitoring methods. We will consider evaluation approaches to different types of library services.

Course Objectives
This course will (a) expose students to the concept of a culture of assessment for library and information services, (b) review the current state of the art in library and information service planning and evaluation, and (c) provide the student with the tools necessary to plan and conduct evaluations of library and information services.

By the end of the course, students will be able to:

- Identify library functions and services that must be assessed.
- Plan, design, and implement an assessment program in a library.
- Analyze and interpret the data from an assessment, and present that data for diverse audiences.
Course Requirements

This course builds on what the cohort learned in LBSC 701 and focuses on establishing a culture of assessment in a library or information service organization and on evaluation strategies for different aspects of library and information services. The textbook will be supplemented by articles from the literature that will help to provide a sense of the state of the art of library and information service evaluation.

Students are expected to read all of the assigned material, including that provided by their fellow students, and to participate in class discussions. In general, the textbook provides information on the application of social research methods to LIS evaluation, and students may find it to be a useful resource in their professional life.

Throughout the semester I may identify additional interesting readings and I will post them as appropriate.

Required Textbooks:


Davidson, E. J. (2012). Actionable Evaluation Basics: Getting succinct answers to the most important questions. This book is available from Amazon and Smashwords in a variety of formats.

Additional readings are also listed on the calendar.

Additional reading

Other good books on evaluation generally and evaluation in libraries specifically include:


Silipingni, L. & Powell, R. R. Basic Research Methods for Librarians. *If you want to delve more into research methods.*

**A Community of Practice:**


ARL also maintains the [ARL ASSESS listserv](https://listserv.loc.gov/), which is worth subscribing to.
# Class Schedule, Topics, and Readings

<table>
<thead>
<tr>
<th>WEEK</th>
<th>TOPICS</th>
<th>TEXTBOOK</th>
<th>OTHER READINGS</th>
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| September 23-29       | Evaluating Library and Information Service Users and Nonusers           | Chapter 7 | Data Driven Libraries – watch one of these 3 webcast (emphasis on public libraries): http://lj.libraryjournal.com/webcasts/data-driven-libraries-navigating-options-measuring-outcomes/?ref=LJfoot  
Student identified articles |
| September 30-October 6| LibQUAL+                                                               | Appendix B | Parasuraman on LibQUAL+ YouTube video - http://www.youtube.com/watch?v=JOvO9ARiaSM  
Student identified articles |
| October 7-13          | Evaluating Reference and Instructional Services                        | Chapters 10 and 14 | Student identified articles                                                                                                                     |
| October 14-20         | Evaluating Library and Information Service Collections                 | Chapters 8 and 9 | Student identified articles                                                                                                                     |
| October 21-27         | Evaluating Technical Services                                          | Chapter 11 | Student identified articles                                                                                                                     |
| October 28 – November 3| Evaluating Interlibrary Loan                                           | Chapter 12 | Student identified articles                                                                                                                     |
| November 4-10         | Evaluating Online Systems                                              | Chapter 13 | student identified articles                                                                                                                     |
| November 11-17        | Evaluating Customer Service MISO, TechQUAL & LibQUAL+                 | Chapter 15 | Websites for MISO, TechQUAL and LibQUAL+ student identified articles                                                                         |
| November 18-24        | Impact Evaluation                                                      | Chapters 16 and 17 | Megan Oakleaf. The Value of Academic Libraries  
LibValue Webcasts on ARL YouTube channel – watch at least one of the 2013 six webcasts |
Month: September

**Week of Sept 3 – 8**

- **Readings**
  


**Week of Sept 9 – 15**

- **Readings**
  


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Read about Outcome Based Evaluation at the IMLS web site: [www.imls.gov/applicants/basics.aspx](http://www.imls.gov/applicants/basics.aspx)


Week of Sept 16 – 22


Week of Sept 23 – 29

**Week of Sept 30 – October 6**

Parasuraman on SERVQUAL and the Technology Readiness Index -- LibQUAL+ YouTube video (3 hrs) -  [http://www.youtube.com/watch?v=JOvO9ARiaSM](http://www.youtube.com/watch?v=JOvO9ARiaSM)

**Week of Nov 11 – 17**

Websites for
MISO:  [www.misosurvey.org](http://www.misosurvey.org)
TechQUAL:  [www.techqual.org](http://www.techqual.org)
LibQUAL+:  [www.libqual.org](http://www.libqual.org)
SERU:  [http://www.oir.umn.edu/surveys/seru](http://www.oir.umn.edu/surveys/seru)
NSSE:  [http://nsse.iub.edu/](http://nsse.iub.edu/)

**Week of Nov 18 – 24**

[http://www.acrl.ala.org/value/?page_id=21](http://www.acrl.ala.org/value/?page_id=21)

LibValue Webcasts on ARL YouTube channel – watch at least one of the 2013 six webcasts  
[http://www.youtube.com/user/ARLVideo](http://www.youtube.com/user/ARLVideo)

Standards for Libraries in Higher Education - Patricia Iannuzzi video  

**Week of Dec 2-8**

ARL Bimonthly report special issue on the Value in Libraries (2010):  

Read about Outcome Based Evaluation at the IMLS web site:  
[www.imls.gov/applicants/basics.aspx](http://www.imls.gov/applicants/basics.aspx)
Assignments and Grading

See assignment descriptions at the end of the syllabus. Grades for the course will be calculated as follows:

- **Introduction of yourself** – due September 8 - 5 points
- **Visit to a library or information agency** - due September 22 - 15 points
- **Article identification and review** – due dates Monday September 23 - November 17 (see assignment) - 20 points
- **Benchmarking services and quality through standard tools like LibQUAL+, TechQUAL and MISO** – due December 2 – 15 points
- **Case study analysis and recommendations** – due December 16 - 25 points
- **Class participation** – 20 points

Academic Integrity

*Students are reminded that the University of Maryland has absolute expectations for academic integrity from every student. The Code of Academic Integrity strictly prohibits students from cheating on assignments, plagiarizing papers, submitting the same paper for credit in two courses without authorization, buying papers, submitting fraudulent documents, and forging signatures. Instances of any suspected academic dishonesty will be reported and handled according to University policy and procedures. 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](http://www.shc.umd.edu). For a more detailed description of the University's definition of academic dishonesty, visit [http://www.faculty.umd.edu/teach/integrity.html](http://www.faculty.umd.edu/teach/integrity.html).*

Accommodations for Students with Disabilities

The University is committed to providing appropriate accommodations for students with documented disabilities. In order to ascertain what accommodations should be provided to facilitate your learning experience, please be sure to inform the instructor of your needs at the beginning of the semester. The instructor will then contact relevant parties such as the University’s Disability Support Services, who will make arrangements with you to determine and implement appropriate academic accommodations. For more information on the University’s policies, see [http://www.faculty.umd.edu/teach/disabilities.html](http://www.faculty.umd.edu/teach/disabilities.html).

CourseEvalUM

Your participation in the evaluation of courses through CourseEvalUM is a responsibility you hold as a student member of our academic community. Your feedback is confidential and important to the improvement of teaching and learning at the University as well as to the tenure and promotion process. Please go directly to the website
Assignments

1. **Introduction of yourself** – due September 8 - 5 points

You in the cohort already know each other, but I don't, and it will be helpful to review any prior evaluation experience you have. Your introduction of yourself should be posted on your profile page by September 8 and should cover the following:

- Preferred nickname and photo
- Your geographic location
- Your educational background
- Your reasons for deciding to go to a library and information school in general, and to UMd in particular
- Current or previous employment in a library or information organization
- Any experience with library and information service evaluation
- Any other experience with evaluation
- The topic of your research project for LBSC 701 and a short summary of your methodological framework
- A fun fact about you

My introduction is the article you have to read this first week by Kyrillidou and Cook – it covers a lot of what I care and work for. You may also enjoy meeting me through the LibValue YouTube video recorded in 2010 and posted on my LinkedIn profile at the beginning of our LibValue activities: http://www.linkedin.com/profile/view?id=18169974&trk=hb_tab_pro_top or through my ARL bio page for something more general: http://www.arl.org/about/staff/94-martha-kyrillidou

2. **Visit to a library or information agency** - due September 22 - 15 points

The purpose of this assignment is twofold: to learn about how a specific library or information agency approaches the evaluation of their services and potentially to have a library to use for your case study (other case study options will be available).

The first step is to select a library or information service that will serve as the subject of this assignment. This may be a LIS that you work in, or have previously worked in, but you may find it more educational to select another LIS. If you are interested in a large LIS, you may wish to identify a portion of it, for example if you were interested in the Library of Congress you might choose the
Congressional Reference Service. Choose a LIS that is of interest to you, and where there is information about the LIS available online, and where you will be able to interview the head within the time provided for the assignment. If you have questions about the suitability of your choice, ask.

Once you have selected your site, you should schedule an interview with the head of the LIS, review information online, and plan your interview questions (I would like to review with you your interview questions before you conduct the interview). After your interview and review of any additional information provided, you should write up your visit report.

Sections of your report should include:
- The name, location and web site of the LIS you are profiling
- Why you chose this LIS
- The name and title of the person you interviewed
- A brief description of the LIS, including its user community, services offered and organizational structure
- An overview of how the LIS carries out planning for its services
- An overview of how the LIS carries out evaluation of its services
- One or two specific examples of an evaluation conducted by the LIS, with a description of the purpose, methods, and outcome of the evaluation (The last three may be difficult to obtain, and the person interviewed may not feel that there has been formal planning or evaluation done. Probe for how decisions are made about staffing, collection, services, etc., and ask about changes that have occurred and how decisions were made about those. Probe for reports/statistics compiled and how those are used.)
- Identification of one or two areas or upcoming decisions where the interviewee feels evaluation would be relevant

Depending on the complexity of the organization you selected, I would expect the interview to be 1-1 1/2 hours in length and the case study to be 3-6 pages. Include your evaluation of the culture of assessment in the organization. The latter is a guideline, not a requirement - the case study, like all assignments, should be as long as is necessary to cover the required elements. If you want to work in groups, let me know. The report will need to be more extensive for people working in groups.

3. Article identification and review – due dates Monday September 23 - November 17 (see assignment) - 20 points

Weeks 4 through 11 of class are concerned with the evaluation of different aspects of library services, and provide an opportunity to review specific evaluation studies documented in the LIS literature. The identification and review of each related evaluation study topic will be carried out by each person. During the first class week, each student should email me with their top 3 choices for topics and I will get back to you with the assignments.
When you are assigned to a particular week and aspect of library services, you should:
- Review the chapter or chapters assigned to understand what aspect of library services is being considered
- Conduct a search of the library literature to identify articles that describe specific evaluations done of that aspect of library service.
- Review your search results and choose one article that you think are well done and reflective of either standard evaluation practices in that area or innovative approaches to evaluation

- Create descriptions of your selected article to be shared with the class. Descriptions should include:
  - A citation to the article, and either a link to the article or to a scan of it
  - Indication of why you selected this article
  - Summary of the article that includes the goal of the evaluation, the methods used, and the result (it's OK to use the abstract if it includes all three of those topics)
  - Your assessment of how well the evaluation was done and how well it was documented
  - Two questions about the article for your classmates to discuss

I would expect each article summary to be the equivalent of 2-4 pages. Summaries should be posted to the Discussion Board by the end of the Monday within the week we are covering that aspect of library service.

In general, recent articles (since 2000) are preferred. If, however, your search and review of the literature leads you to a classic evaluation study (i.e. one that is much cited and has served as a model for multiple other studies), you should select it. Video and websites may also be acceptable for review in consultation with the instructor and after official approval. You may also browse through the Library Assessment Conference proceedings [www.libraryassessment.org](http://www.libraryassessment.org), the Northumbria Proceedings though they are sporadically available, or the publications section of the LibQUAL+ website among other things.

4. **Benchmarking services and quality through standard tools like LibQUAL+, TechQUAL and MISO** – due December 2 – 15 points

At their core, these practical tools contribute to the self-study and review process academic institutions go through (often through formalized accreditation steps). Describe how these tools contribute to our understanding of the changing roles of academic libraries and learning technologies in the higher education and information environment. Identify how these tools are used to underscore the need for libraries to engage in a continuous process of assessment and to demonstrate clear and concrete evidence of value. Given increasing pressures for libraries, IT
service units and universities, in general, to assess and demonstrate value, elaborate on how these (and similar) tools provide guidance in this area.

- Identify an institution that has implemented one or more of these tools
- Arrange for a phone interview with the person/people that implemented these tool(s) (about 45 minutes to an hour)
- Identify pros and cons of these tools and their use in self-assessment, quality improvement and/or accreditation processes

I would expect 4 to 5 pages report summarizing literature review, interview findings and conclusions.

5. **Case study analysis and recommendations** – due December 16 - 25 points

For the final class project, you will be considering a specific LIS organization, either the one you profiled in Assignment 2 or 4 or one that you identified in some other way in consultation with the instructor. Your general job will be to analyze what is known about the organization and provide recommendations related to planning and evaluation, including the description of one evaluation study that you feel should be conducted. The additional details of this assignment will be provided by October 13.

**Class participation** – 20 points

Each Monday (or beforehand) I will post some discussion questions. In weeks 6-10 your fellow students will also, by the end of Monday, post their article reviews with discussion questions. The questions presented will provide the basis for class discussion, although discussion will not be limited to these topics. Each student is responsible for reading the book chapters, article reviews and other readings assigned and for either making an original substantive comment or responding substantively to another's comment a minimum of 20 times over the course of the semester. Whenever possible, comments should be based on evidence rather than solely on personal opinion. The instructor will participate in the class discussion.

Grading of class participation will be based on the quality and quantity of postings to the Discussion Board. The instructor will review each student’s class participation at midterm and provide feedback and a preliminary grade based on the participation to that point.

Discussion 1 (.5 points): This is the first time I am using ELMS and I have been told that you have been using it for a couple of semesters already. Can you identify one or two features that you love because they help you learn and engage with the content and the instructor? Describe the most compelling way you were able to engage with one another and with the instructor in an effective way
through the ELMS system. Describe a good way to engage in synchronous discussion/collaboration.

Discussion 2 (.5 points): Defining ‘research,’ ‘evaluation,’ and ‘assessment’: Can you briefly describe how you understand the meaning of these words: (a) research, (b) evaluation, and (c) assessment. Feel free to look at definitions using Google search and other tools and resources but do identify the source of your evidence in your response.