

LBSC 713 ML01 Planning and Evaluating Information Services Spring 2014

Instructor: Martha Kyrillidou, Association of Research Libraries

Email: through elms or martha@arl.org

Phone: 202 251 9829

Skype: martha.kyrillidou

Blog: www.libraryassessment.info

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).

Class period: January 30 – May 15 (5:30-8:15 pm)

Class location: HBK 1112

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. Conduct of a library-based evaluation.

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 will be conducted primarily as a seminar, with a mix of
- general discussion and assignments of library evaluation based on readings from the textbook and the literature with

- a hands-on evaluation of the UMD library web site and space from different perspectives (the class has the option of submitting and presenting this project at a regional conference)

Teams will be formed to carry out specific aspects of the evaluation, and will report periodically throughout the semester. Most classes will combine coverage of a particular evaluation topic with activities related to the library web site evaluation.

Students are expected to read all of the assigned material. In general, the textbook provides detail on social research methods including examples from the library and information science literature, and students may find it to be a useful resource in their professional life. It also serves as a good starting point for the evaluation teams.

Since this is a seminar, class discussion is an important component of the course experience and of your grade.

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:

The Evaluation and Measurement of Library Services. Joseph R Matthews. Libraries Unlimited, 2007. ISBN-13: 978-1-59158-532-9. (*available from the bookstore or Amazon*) Chapters assigned for classes are listed on the calendar.

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](#).

A Community of Practice:

The Association of Research Libraries (ARL) sponsors a biannual [Library Assessment Conference](#). The next conference will be 4–6 August 2014. You should go.

ARL also maintains the [ARL ASSESS listserv](#), which is worth subscribing to.

Class Schedule, Topics, and Readings

| WEEK | TOPICS | TEXTBOOK | OTHER READINGS |
|------------------------------|---|-------------------------------|---|
| 1. January 30 | Introductions; Class Plans; Planning, Evaluation and Research | ----- | In honor of F. W. Lancaster http://en.wikipedia.org/wiki/Frederick_Wilfrid_Lancaster Kyrillidou (2008), Lakos (2004), Stoffle (1996), |
| 2. February 6 | The Evaluation Process; Planning and Monitoring | Chapters 1 and 3 | Bowlby (2011), Hiller (2008), Hufford (2013) Koufogiannakis (2014) |
| 3. February 13 | Evaluation Models | Chapters 2 and 20 Davidson | Orr (1974), Tenopir (2013), Self (2003) , Town (2013) |
| 4. February 20 (asynch) | Evaluating Library and Information Service Users and Nonusers | Chapter 7 | Student identified articles |
| 5. February 27 | LibQUAL+ | Appendix B | Parasuraman on LibQUAL+ YouTube video - http://www.youtube.com/watch?v=JOvO9ARiaSM March 1 deadline for proposal abstracts Student identified articles |
| 6. March 6 (asynch) | Evaluating Reference and Instructional Services | Chapters 10 and 14 | Student identified articles |
| 7. March 13 (asynch) | Evaluating Library and Information Service Collections | Chapters 8 and 9 | Student identified articles |
| 8. March 27 | Evaluating Technical Services | Chapter 11 | Student identified articles |
| 9. April 3 | Evaluating Interlibrary Loan | Chapter 12 | Student identified articles |
| 10. April 10 | Evaluating Online Systems | Chapter 13 | student identified articles |
| 11. April 17 (Group work) | Evaluating Customer Service MISO, TechQUAL & LibQUAL+ | Chapter 15 | Websites for MISO, TechQUAL and LibQUAL+ student identified articles |
| 12. April 24 | Impact Evaluation Accreditation | Chapters 16 and 17 | Megan Oakleaf. The Value of Academic Libraries LibValue Webcasts on ARL YouTube channel Standards for Libraries in Higher Education - Patricia Iannuzzi video http://learningtimeevents.org/acrl/acrl- |

| | | | |
|---------------------------|--------------------------|---|--|
| | | | stds-archive/ |
| 13. May 1 | Outcomes Evaluation | Chapters 18 and 19 | ARL Bimonthly report special issue on the Value in Libraries (2010): http://publications.arl.org/rli271/ Read about Outcome Based Evaluation at the IMLS web site: www.ims.gov/applicants/basics.aspx |
| 14. May 8 (asynch) | Review of Course | Assignment: Team Assignment presentation* | Presentation of results |
| 15. May 15 | Final written assignment | | |

Readings

Week 1

Martha Kyriallidou and Colleen Cook, "The Evolution of Measurement and Evaluation of Libraries: A Perspective from the Association of Research Libraries" *Library Trends*, 56:4, 2008: 888-909. This article is part of *Library Trends* 56 (4) Spring 2008: The Evaluation and Transformation of Information Systems: Essays Honoring the Legacy of F. W. Lancaster. Edited by Lorraine J. Haricombe and Keith Russell.
<https://www.ideals.illinois.edu/handle/2142/9498>.

Amos Lakos and Shelley Phipps. *Creating a Culture of Assessment: A Catalyst for Organizational Change. portal: Libraries and the Academy*, 4:3, 2004, 345-361.
http://muse.jhu.edu.proxy-um.researchport.umd.edu/journals/portal_libraries_and_the_academy/v004/4.3lakos.pdf

Carla Stoffle, "Choosing our futures" *College and Research Libraries*, 57 (3): 213-225.
http://intranet.library.arizona.edu/teams/admin/documents/ChoosingOurFutures_Stoffle_1996.pdf

Week 2

Rayna Bowlby, "Living the Future: Organization Performance Assessment" *Journal of Library Administration*, 51: 7-8, 2011, 618-644. <http://web.ebscohost.com.proxy-um.researchport.umd.edu/ehost/pdfviewer/pdfviewer?sid=374fd66b-dc87-4f57-9970-c10193be3e30%40sessionmgr112&vid=2&hid=103>

Steve Hiller, Martha Kyrillidou, and Jim Self. "When the evidence is not enough: organizational factors that influence effective and successful library assessment." *Performance Measurement and Metrics*, 9(3) (2008): 223-230. Also, as paper presented at the 4th International Evidence Based Library & Information Practice Conference, Durham, North Carolina, May 7, 2007 available here:

<http://www.emeraldinsight.com.proxy-um.researchport.umd.edu/journals.htm?articleid=1753998&show=html>

Denise Koufogiannakis, "Determinants of Evidence Use in Academic Library Decision Making" *College and Research Libraries* 75 (1) (January 2014):

<http://crl.acrl.org/content/early/2014/01/17/crl13-570.long>

Jon R. Hufford. "A review of the literature on assessment in academic and research libraries, 2005 to August 2011. *Portal: Libraries and the Academy*, 13:1, 2013: 5-35.

http://muse.jhu.edu.proxy-um.researchport.umd.edu/journals/portal_libraries_and_the_academy/v013/13.1.hufford.html

Week 3

Carol Tenopir, "[Building Evidence of the Value and Impact of Library and Information Services: Methods, Metrics and ROI](#)," *Evidence Based Library and Information Practice (EBLIP)* vol. 8, no. 2) 2013:

<http://ejournals.library.ualberta.ca/index.php/EBLIP/article/view/19527/15263>

Richard Orr. Measuring the Goodness of Library Services. *Journal of Documentation*, 29(3) 1973, 315-52. (see Course Reserves).

Self, Jim. "Using Data to Make Choices: The Balanced Scorecard at the University of Virginia Library." *ARL*, no. 230/231 (Oct/Dec 2003): 28-29.

<http://www.arl.org/storage/documents/publications/arl-br-230-231.pdf>. This link is to the whole issue and you may find the other articles included here useful to browse through.

Stephen Town and Martha Kyrillidou. "Developing a Values Scorecard" *Performance Measurement and Metrics* 14 (1) (2013): 1-16. Also in Proceedings of the 9th Northumbria International Conference on Performance Measurement in Libraries and Information Services, Ian Hall, Stephen Thornton, and Stephen Town, eds. York, England, August 22-26, 2011 (York, UK: University of York, 2012): 415-422.

<http://www.emeraldinsight.com.proxy-um.researchport.umd.edu/journals.htm?articleid=17086961&show=html>

Week 4

Data Driven Libraries – watch one of these 3 webcasts (emphasis on public libraries):

<http://lj.libraryjournal.com/webcasts/data-driven-libraries-navigating-options-measuring-outcomes/?ref=LJfoot>

Week 5

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

Week 11

Websites for

MISO: www.misosurvey.org

TechQUAL: www.techqual.org

LibQUAL+: www.libqual.org

SERU: <http://www.oir.umn.edu/surveys/seru>

NSSE: <http://nsse.iub.edu/>

Edge: <http://www.libraryedge.org/>

Week 12

Megan Oakleaf. The Value of Academic Libraries: a Comprehensive Research Review and Report. Association of College and Research Libraries, 2010.

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>

Standards for Libraries in Higher Education - Patricia Iannuzzi video

<http://learningtimesevents.org/acrl/acrl-stds-archive/>

Week 13

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

<http://publications.arl.org/rli271/>

Read about Outcome Based Evaluation at the IMLS web site:

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:

- What's the problem? - due February 6 - 10 points
- Individual plan - due April 3 - 15 points
- Article identification and presentation - various due dates - 20 points
- Team assignment: Navigating library physical and virtual spaces - due dates February 27 and May 8, 15 - 40 total points, 10 for the plan and 30 for carrying it out
- Class participation - throughout - 15 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>. For a more detailed description of the University's definition of academic dishonesty, visit <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>.

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

(<http://www.courseevalum.umd.edu>) to complete your evaluations at the end of the semester.

Assignments

* **What's the Problem** - due date February 13 - 10 points

Students in the previous class made visits to libraries and learned about the evaluation activities of those libraries. Several of these reports will be made available to you, and you will select one and identify an evaluation question related to the library's website or physical space that you think it would be worthwhile for that library to address. In addition to the report, you may also utilize additional information about the library gained from their web site. You will submit a brief report (1-3 pages) on the question you select and why you think that it should be pursued. In class, we will discuss the different questions identified for each environment.

* **Individual plan** - due April 3 - 15 points

Using either the question you identified in the first assignment, a question selected from a list of case studies presented to you, or a question of your own choosing, you will develop a general evaluation plan. Of course you will consult the library literature to get an idea of how this question has been addressed previously. Your plan is not meant to be a detailed plan such as the one you develop for the class project, but rather you should focus on selecting an appropriate method or methods and identifying key elements such as the population to be considered, areas for questioning, existing records to be reviewed, etc. I would expect the resulting paper to be 3-6 pages in length. Individual plans will be discussed in class on April 4.

* **Article identification and presentation** – various due dates - 20 points

Weeks 6 through 14 of class are concerned with the evaluation of different aspects of library services, and provide an opportunity to also review specific evaluation studies documented in the LIS literature. Weeks and topics will be assigned at the first class meeting.

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 chose an article that you think is well done and reflective of either standard evaluation practices in that area or innovative approaches to evaluation

Distribute a citation to your article and either a link to it or a scan to the class by the end of the Friday preceding your presentation. Your presentation to the class should include

- Indication of why you selected this article
- a brief summary of the article that includes the goal of the evaluation, the methods used, and the result
- Your assessment of how well the evaluation was done and how well it was documented
- Two or more questions about the article for your classmates to discuss

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.

Plan on a presentation time of about 20 minutes, including class discussion. You may use handouts and/or power points, but they are not required.

* **Team Assignment: Navigating library virtual and physical spaces** - due dates February (lit review or plan) and May 8 and 15 (report of results) - 40 total points, 10 for the plan and 30 for carrying it out

Teams for different aspects of the UMD website and physical space evaluation will be made up during the first class. One team will be responsible for doing a thorough literature search for the evaluation, and will report to the class on February 21. The other teams will be carrying out specific evaluation tasks, with each team responsible for developing a plan and timeline to be reported on February 21, and for carrying out their plan. The plans will be presented both orally and in writing (handouts and/or power points are sufficient), and should include a description of the methods you have selected including why you have selected them, the resources that you will utilize, and a detailed timeline.

Teams will have some time in class for group work, and will be assigned dates on which they will report to the class on their progress.

The results of the team's work will be presented both orally (May 8) and in writing (May 15). For the oral report we will invite UMD Library staff and you should include a brief description of how you conducted the task but focus on your findings. The written report should include those elements (handout and/or power points from the presentation acceptable) along with the group's impressions of lessons learned from their work and a description of which team member did what.

* **Class Participation** – 15 points

Grading of class participation will be based on the quality and quantity of your contributions to the class. This grade covers your participation in general discussions - participation in your team's work will be factored into that grade.