

ENGAGING ASSESSMENT TO SHOW YOUR VALUE

A Workshop for the Health Science Librarians of Illinois

Lisa Janicke Hinchliffe

November 10, 2016

My Approach to Workshops

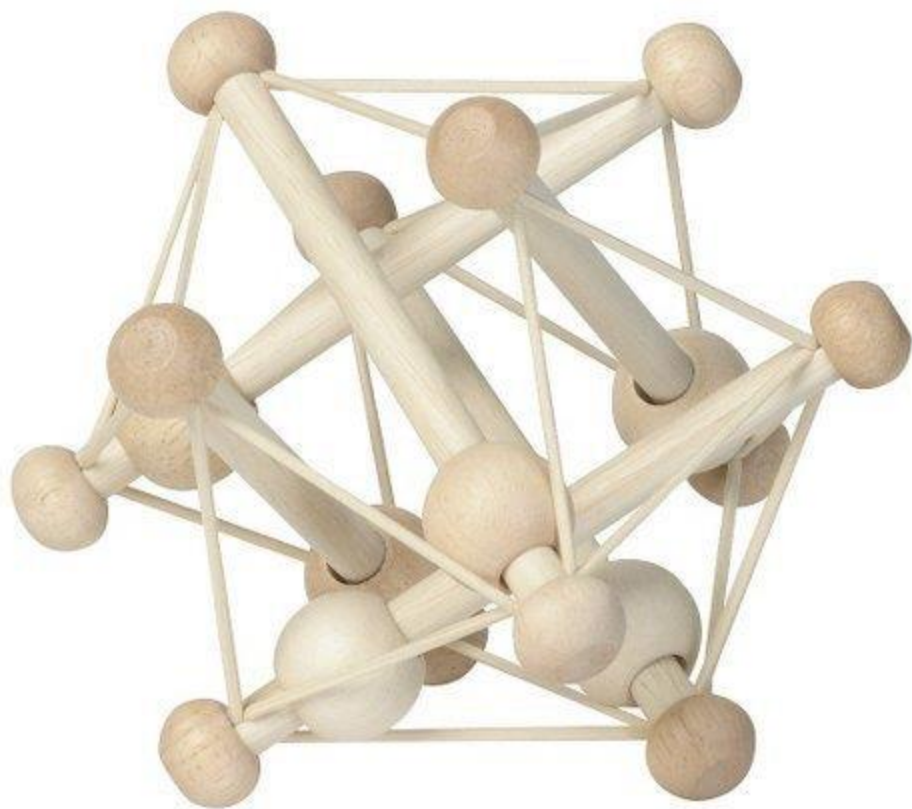
Respect Mutual Expertise
Informal and Conversational
Ask Questions
Responsive and Flexible
If I Don't Know, I'll Find Out
Your Colleague Forever



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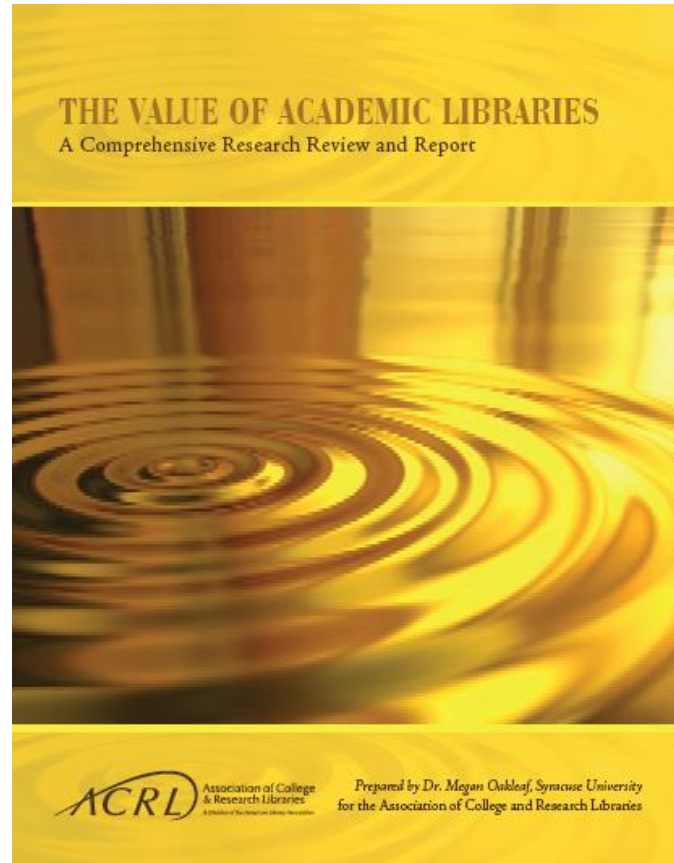
A G E N D A

- Program Logic Model for Service Design
- Assessment Cycle
- Assessment Facets of Service Design/Delivery
 - Needs Assessment
 - Best Practices and Professional Standards
 - Resource Adequacy
 - Implementation Fidelity
 - Program Quality
 - Outcomes and Impact
- Planning, Change and Communication



DESIGN AND ASSESS

September 2010 – “The Report”



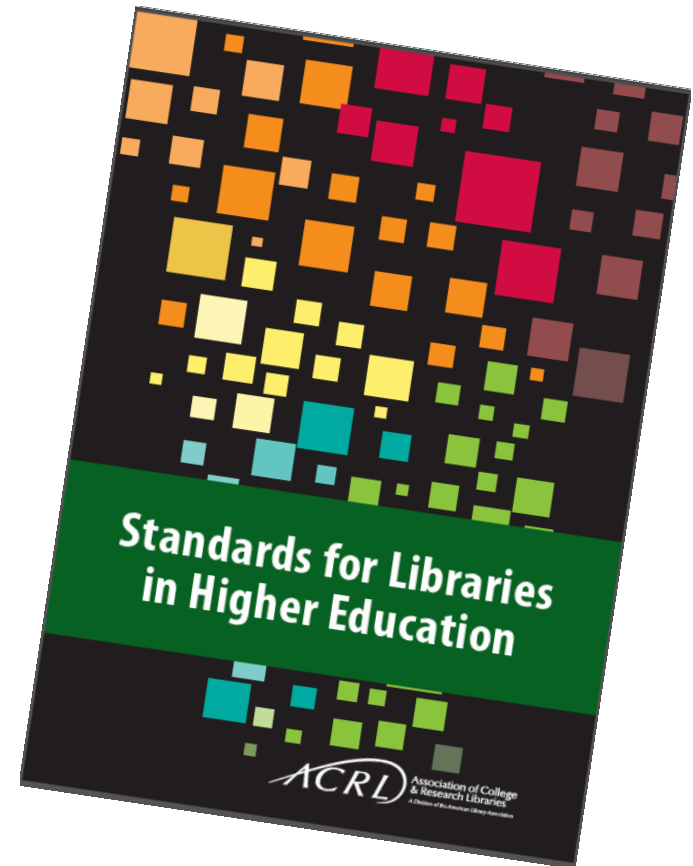
<http://www.acrl.ala.org/value/>

***Few libraries exist in a vacuum,
accountable only to themselves.
There is always a larger context for
assessing library quality, that is,
what and how well does the library
contribute to achieving the overall
goals of the parent constituencies?***

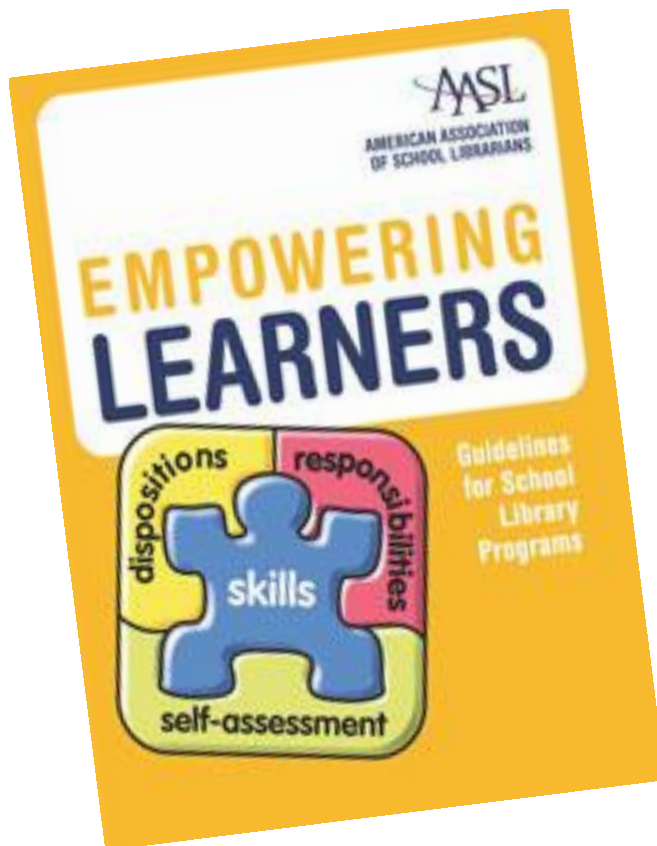
Association of College and Research Libraries

"make a statement about what libraries are, what they do, how they contribute, how they make a difference, and ultimately how they add value on our campuses, in our communities and within higher education"

Patty Iannuzzi
(Chair, Standards Task Force)



American Association of School Librarians



"Empowering Learners advances school library programs to meet the needs of the changing school library environment and is guided by the Standards for the 21st-Century Learner and Standards for the 21st-Century Learner in Action."

Medical Library Association

SPECIAL REPORT

DOI: 10.3163/1536-5050.96.2.162

Standards for hospital libraries 2007

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BACKGROUND

The Medical Library Association's (MLA's) "Standards for Hospital Libraries" were first published in 2002.

■ added references to the new MLA educational policy statement, *Competencies for Lifelong Learning and Professional Success*, and

■ removed references to the Brandon/Hill list and added references to Doody's Core Titles.

The MLA Board also recommended that the revised standards should be called "Standards for Hospital Libraries 2007" and that the publication history be indicated.

The complete "Standards for Hospital Libraries 2007" are also available on the Hospital Libraries Section website <<http://www.hls.mlanet.org>> as well as PubMed Central.

REFERENCES

1. Gluck JC, Hassig RA, Balogh L, Bandy M, Doyle JD, Kronenfeld MR, Lindner KL, Murray K, Petersen JA, Rand DC. Standards for hospital libraries 2002. *J Med Libr Assoc* 2002Oct;90(4):465-72.
2. Hassig RA, Balogh L, Bandy M, Doyle JD, Gluck JC, Lindner KL, Reich B, Varner D. Standards for hospital libraries 2002 with 2004 revisions. *J Med Libr Assoc* 2005 Apr;93(2):282-3.
3. Holst R. Final report. National Network of Libraries of Medicine Hospital Internet Access Task Force [web document]. National Network of Libraries of Medicine.

SERVICE DESIGN

What's a Library Service?



Comprised of?

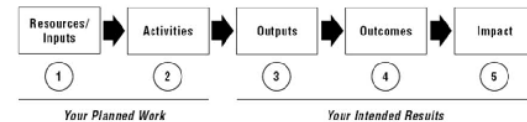
Targeted to?

Delivered by?

Logic Model Basics (Handout)

Logic Model Basics¹

"A logic model is a systematic and visual way to present and share your understanding of the relationships among the resources you have to operate your program, the activities you plan, and the changes or results you hope to achieve."



YOUR PLANNED WORK - what resources you think you need to implement your program and what you intend to do.

1. Resources include the human, financial, organizational, and community resources a program has available to direct toward doing the work. Sometimes this component is referred to as Inputs.

2. Program Activities are what the program does with the resources. Activities are the processes, tools, events, technology, and actions that are an intentional part of the program implementation. These interventions are used to bring about the intended program changes or results.

YOUR INTENDED RESULTS - include all of the program's desired results (outputs, outcomes, and impact).

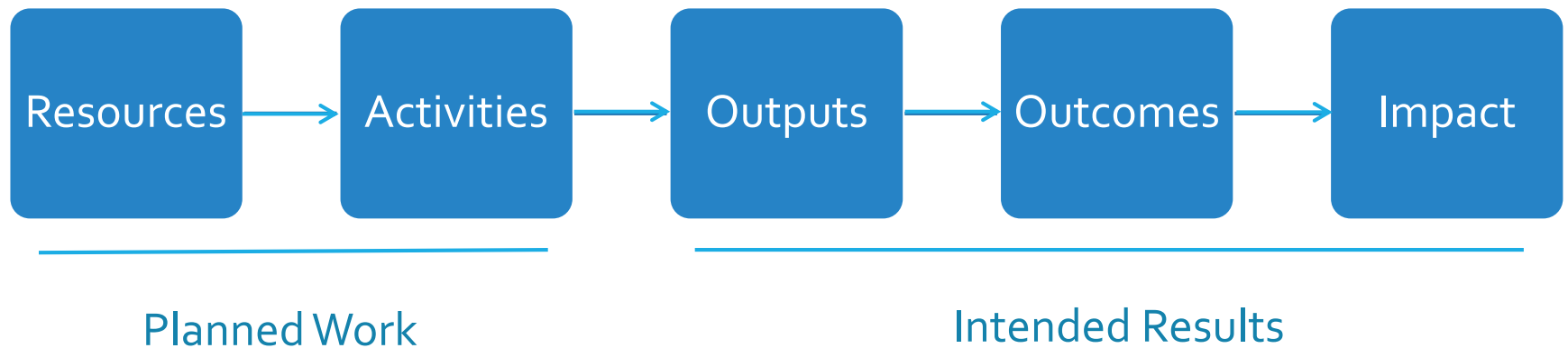
3. Outputs are the direct products of program activities and may include types, levels and targets of services to be delivered by the program.

4. Outcomes are the specific changes in program participants' behavior, knowledge, skills, status and level of functioning. Short-term outcomes should be attainable within 1 to 3 years, while longer-term outcomes should be achievable within a 4 to 6 year timeframe. The logical progression from short-term to long-term outcomes should be reflected in impact occurring within about 7 to 10 years.

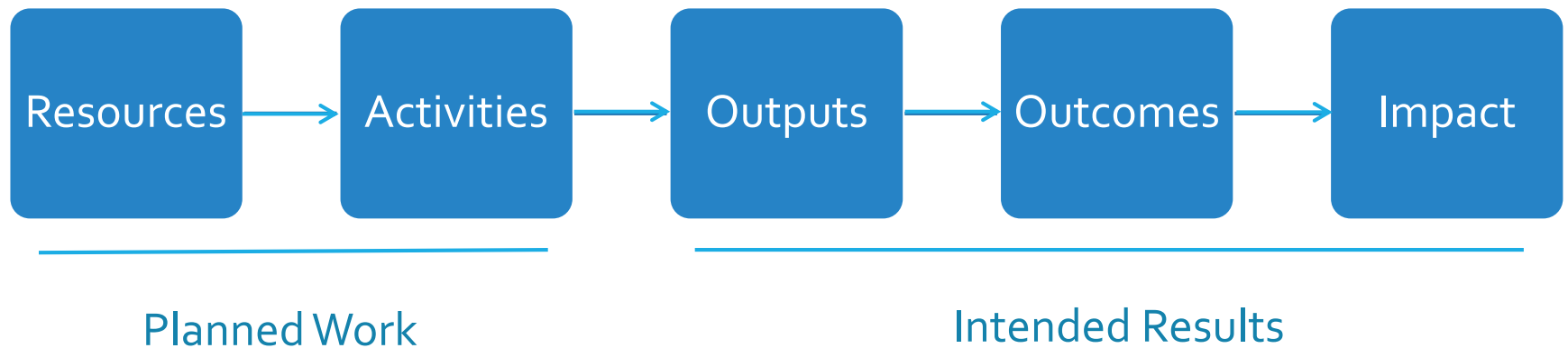
5. Impact is the fundamental intended or unintended change occurring in organizations, communities or systems as a result of program activities within 7 to 10 years.

¹ Excerpted from W.K. Kellogg Foundation's *Logic Model Development Guide*

Basic Logic Model



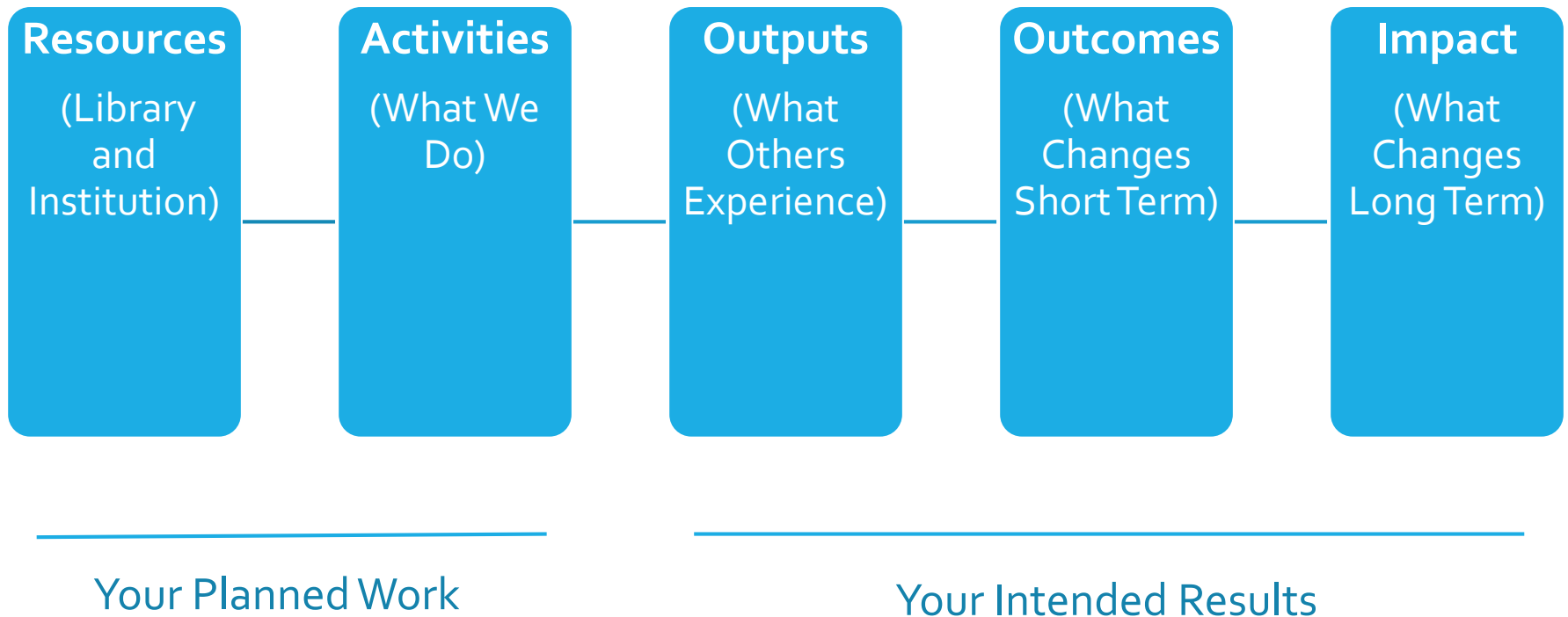
Basic Logic Model



Basic Logic Model



Information Literacy Program Logic Model



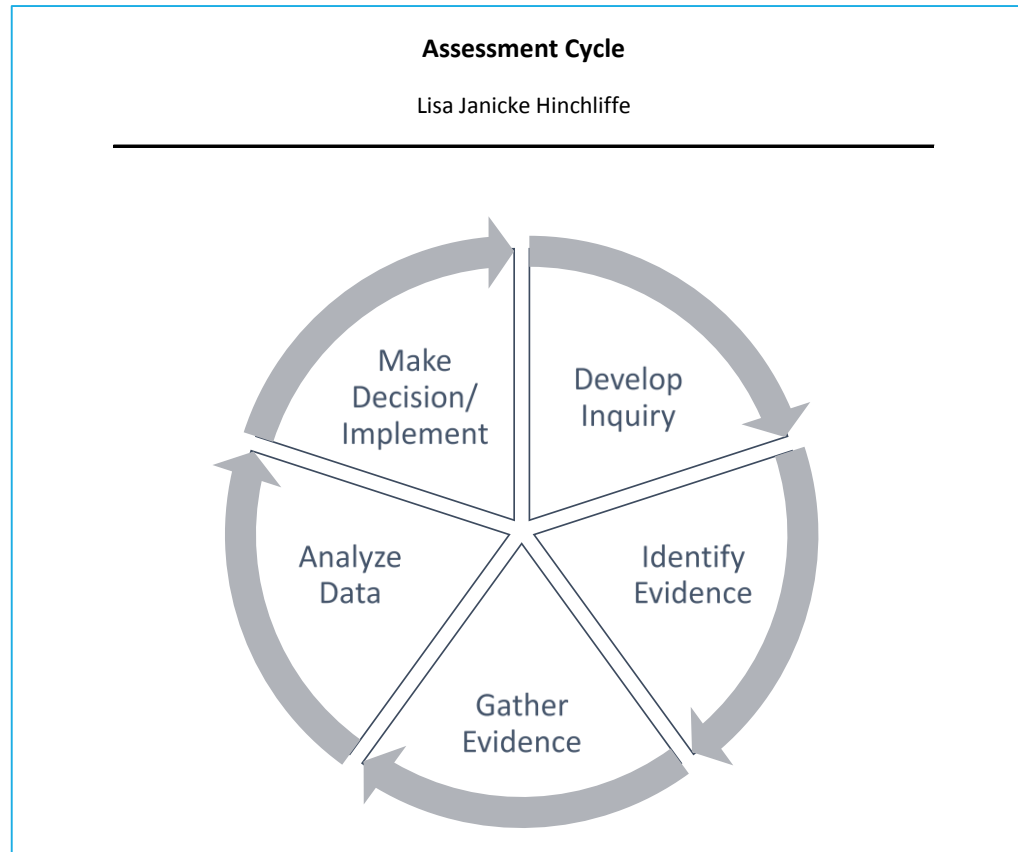
Program Logic Model for _____

Program Logic Model for _____

Resources In order to accomplish our set of activities we will need the following resources:	Activities In order to address our problem or issues, we will need to accomplish the following activities:	Outputs We expect that once accomplished these activities will produce the following evidence:	Outcomes We expect that if accomplished these activities will lead to the following changes in the short term.	Impact We expect that if accomplished, these activities will lead to the following large-scale impacts in the long term.

SERVICE ASSESSMENT

Assessment Cycle (Handout)



AC: Develop Inquiry

- What do you need to know?
- Who needs to be engaged?
- How does this connect to parent constituencies?

AC: Identify Evidence

- How will we know we have met our goals/outcomes?
- What standards of success will we use?
- What data/information do we need to gather?

AC: Gather Evidence

- How and when will we gather it?
- How will it be recorded or documented?

AC: Analyze Data

- How and when will we analyze it?
- What patterns exist in the data?
- Are our activities effective?

AC: Make Decision/Implement

- What changes are necessary as a result of the analysis?
- What is working well that needs to be nurtured?
- What are our priorities and plans for action?

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Remember ...

**“assessment efforts
should not be
concerned about
valuing what can be
measured but,
instead, about
measuring what is
valued”**

Trudy Banta

Assessment Facets of Service Design and Delivery (Handout)

Assessment Facets of Service Design and Delivery

Lisa Janicke Hinchliffe

Needs Assessment	
Best Practices and Professional Standards	
Resource Adequacy	
Implementation Fidelity	
Program Quality	
Outcomes/Impact	

AF: Needs Assessment

- What does the community need?
 - User/Non-User Suggestions
 - Observation
 - Survey of Information Practices
- What is legally/ethically required?

Building Consensus for Change



Generate
Ideas

Make
Selections

Affirm
Decision

Brainstorming

Rules

- No Judgment Zone
- Lots of Ideas
- Out There Ideas Welcome
- Build on, Combine and Extend Ideas
- No Hierarchy
- (If You Are Leading the Session)
Keep Quiet

Techniques

- Individual Before Group
 - Small Group Variation
- Monitoring
 - Volunteerism
 - Take Turns
 - One Idea Per Turn to Speak
- Prompts
 - Questions
 - Analogies
 - Alternate Audiences

Make Selections = Judgment

- First – Group Review for Any Needed Clarification
 - No Fair Inserting Judgments into Request for Clarification! 😊
- Generate Criteria
 - Once Have Lots of Ideas, How to Determine What is a Good Idea
- Group Decision Process Using Criteria
 - Discussion/Consensus
 - Approval Voting – Vote for Everything You Could Live With
 - Winnowing – Choose Top 5 (or 3 or 10 – Depends)
 - “Pick or Die”
- Group Review of Everything Rejected

Affirming the Decisions

- Group Review of Selected Goal(s)/Objective(s)
- Opportunity to Voice Concerns/Objections
- Group Confirmation
 - Allow for “Disagree but Commit”
- Make “Public”
- Reference Often

AF: Best Practices and Professional Standards

Library

- *Standards for Libraries in Higher Education*
- *Empowering Learners: Guidelines for School Library Programs*
- *Hospital Library Standards*

Service-Specific (Information Literacy/Academic Libraries)

- *Characteristics of Programs of Information Literacy that Illustrate Best Practices: A Guideline*
- *Guidelines for Instruction Programs in Academic Libraries*
- *Standards for Proficiencies for Instruction Librarians and Coordinators*

AF: Resource Adequacy

- Inventory
 - People
 - Resources
 - Facilitates
 - Policies
- Quantity and quality
- Alignment with/scaled to planned activities?
- Temporary or permanent?
- Who is decision-maker?

AF: Implementation Fidelity

- What did we plan to do?
- What did we actually do?
- What are the differences (if any)?
- Were differences anticipated or emergent?
- Were counter-measures implemented?

AF: Program Quality

- Did it meet expected delivery standards?
- Were participants satisfied?
- Were outcomes achieved?

What Data? What Method(s)?

Goal - Users Satisfied



Goal – Users Enabled



What Data? Example Method(s)?

Goal - Users Satisfied



User Survey

Goal – Users Enabled



Performance

Analysis = Identifying Patterns

- Patterns in the Data
- Patterns in What is Inferred from Data
- Remember: Look at Unexpected Data and Outliers

Quantitative Analysis

- Counts and Descriptive Statistics
- Power of Cross-Tabs (Reveal Relationships/Patterns)
- Pay Attention to Big Numbers and Small Numbers/Outliers

Qualitative Analysis

- Word Visualizations – Requires Data Clean-Up and Regularization
- Rubric – Criteria + Levels (Poor/Good/Excellent)

Rubrics Enable Analyzing Complexity

- Move Beyond “I know it when I see it”
- Provide clear guidelines for participants
- Make visible what is valued/judged

Accomplished by:

- Defining what the results should look like
- Clarifying interpretations of terms like “effective” and “understand”
- Developing lists of expectations

Checklist Approach

- Listing of Criteria
- Review for Presence/Absence

Example - Checklist

Assignment: Annotated Bibliographic Item

Dimensions:

- Citation – Present/Absent
- Abstract – Present/Absent

Rubrics

- Criteria + Scale
- Review for Absence/Presence and Quality

Basic Rubric (Handout)

Basic Rubric (Program Quality or Outcomes/Impact)

Lisa Hinchliffe

To Be Assessed:	Scale Level :	Scale Level:	Scale Level:	Scale Level: Absent
Dimension/Criteria:				
Dimension/Criteria:				
Dimension/Criteria:				
Dimension/Criteria:				

Example - Rubric

Assignment: Annotated Bibliographic Item

Dimensions + Scale

	Scale Level: Excellent	Scale Level: Proficient	Scale Level: Developing	Scale Level: Unacceptable
Citation	Includes all citation elements and no more than one formatting error.	Includes all citation elements and no more than three formatting errors.	Includes piece title, author and date of publication.	Lacks piece title, author, or date of publication.
Abstract Content	Thoughtful, detailed abstract that thoroughly summarizes the piece.	Abstract addresses the main point in the piece but omits one or more key concepts.	Abstract does not include the main point.	Abstract misrepresents the piece.
Abstract Writing	Well written; free of minor or technical errors (spelling, grammar, punctuation, etc.).	Clearly written; a few technical errors (spelling, grammar, punctuation, etc.).	Poorly written.	So poorly written that it cannot be understood.

And I REALLY, REALLY Recommend ...



<http://www.introductiontorubrics.com/>

AF: Outcomes/Impact

- May Need Additional Data Collection and Analysis
- Quantitative and/or Qualitative
- Requires a “Theory of Change” (Concept for $X \rightarrow Y$)

Planning, Change and Communication

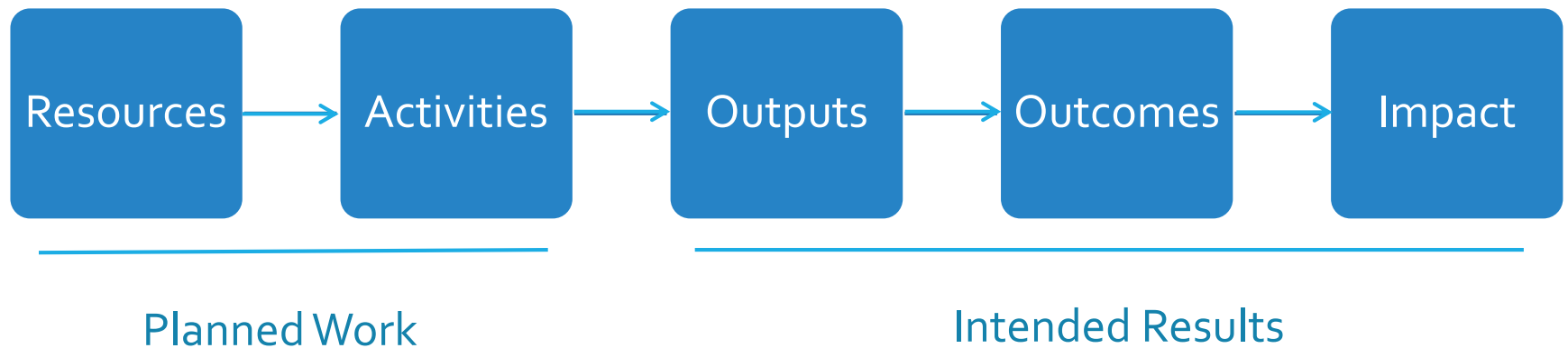
- Iterative Process
- May Be Complicated and Uncomfortable
- Who Decides?
- Who Needs to Know?

Anticipatory Change Discussion

What will we do if the analysis shows that ... ?

- Probes if evidence is aligned with goals.
- Prepares people for change.
- Demonstrates that result is not blame.

Basic Logic Model



Report the Findings

- Understand the audience(s).
- Determine which information is meaningful/important.
- Be clear about kind of data you have.
- Interpret data – don't just present it.
- Be honest about results.
 - Celebrate success.
 - Engage continuous improvement narrative.
- Identify implications and conclusions.
- Review for credibility and clarity.

Be Your Own Critic

- Other People will Critique Your Evidence (Data and Methods) – What Will They Say?
- Prepare Constructive and Thoughtful Responses and/or Improve Your Evidence

Say It In Six (Handout)



Say It In Six: A Model for “The Ask” (and “The Tell”)

*Concentrate on what your audience wants to know,
not on what you want to talk about.*— Ron Hoff

The Structure

1. Burning Issue (30 Seconds) – *Let’s get right to the point. There’s a burning issue that we need to discuss.*
2. Quick Overview (60 Seconds) – *Here’s a quick overview – just a bit of background.*
3. Idea Made Tangible (120 Seconds) – *This led to an idea.*
4. The Payoff (120 Seconds) – *The idea will more than pay for itself. Here’s the payoff.*
5. The Close (30 Seconds) – *Here’s what we need from you to get going.*

“A Culture of Assessment is an organizational environment in which decisions are based on facts, research, and analysis, and where services are planned and delivered in ways that maximize positive outcomes and impacts for customers and stakeholders.

A Culture of Assessment exists in organizations where staff care to know what results they produce and how those results relate to customers’ expectations.

Organizational mission, values, structures, and systems support behavior that is performance and learning focused.”

Cited in: Lakos, Amos and Shelley Phipps, *Creating a Culture of Assessment: A Catalyst for Organizational Change, portal-Libraries and the Academy*, 4:3, (2004), 345-361.

Culture of Assessment Inventory (Handout)

Culture of Assessment Inventory

Based on Lakos, Amos and Shelley Phipps, Creating a Culture of Assessment: A Catalyst for Organizational Change, *portal: Libraries and the Academy*, 4:3, (2004), 345-361.

Characteristic	Never (1)	Sometimes (2)	Often (3)	Always (4)
A. The organization's mission, planning, and policies are focused externally—on supporting the customer's need for access to information.				
B. How performance measures will be assessed is included in organizational planning documents, such as strategic plans and unit goals.				
C. Leadership commits to, and financially supports, assessment activities.				
D. Staff recognize the value of assessment and engage in it as part of their regular assignments. Individual and organizational responsibility for assessment is addressed explicitly—in job descriptions or is otherwise communicated formally.				
E. Relevant data and user feedback are routinely collected, analyzed, and used to set priorities, allocate resources, and make decisions.				
F. Assessment activities are supported by a Management Information System (MIS) or Decision Support System (DSS).				
G. Services, programs, and products are evaluated for quality, impact, and efficiency.				
H. Staff are supported to continuously improve their capability to serve customers and are rewarded for this.				
I. Staff are rewarded for work and the application of new learning that demonstrates improved service quality or better outcomes for customers.				
J. On-going staff development in measurement, evaluation, and assessment is provided and supported.				
K. Units within the library have defined critical processes and established measures of success.				
L. Individual staff develop customer-focused S*M*A*R*T goals in an annual planning process and monitor progress regularly. (SMART = Specific, Measurable, Attainable, Results-Oriented, and Timely)				

QUESTIONS/COMMENTS?

NEXT STEPS?

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