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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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/

Demonstrating Library Value: A National Conversation
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?

“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.”
SPECIAL REPORT

Standards for hospital libraries 2007

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BACKGROUND

The Medical Library Association’s (MLA’s) “Standards for Hospital Libraries” were published in 2003. The MLA, with the assistance of the Hospital Libraries Section (HLS) of MLA, has undertaken a project entitled, “Revising Standards for Hospital Libraries.” The revised standards, “Standards for Hospital Libraries 2007,” were recently approved by the MLA Board of Directors.

This Special Report highlights the major changes that were made to the standards, the rationale behind these changes, and the impact of the new standards on the library profession.

REFERENCES

SERVICE DESIGN
What’s a Library Service?

Comprised of?

Targeted to?

Delivered by?
Logic Model Basics (Handout)

Logic Model Basics

"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."^1

<table>
<thead>
<tr>
<th>Resources</th>
<th>Activities</th>
<th>Outputs</th>
<th>Outcomes</th>
<th>Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
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</table>

**Your Planned Work**

**Your Intended Results**

**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

Resources → Activities → Outputs → Outcomes → Impact

Planned Work

Intended Results
Basic Logic Model

Resources → Activities → Outputs → Outcomes → Impact

Planned Work

Intended Results

ITERATION AND ALIGNMENT
Basic Logic Model

Planning
Monitoring
Diagnosing
Assessing
Managing
Leading
Information Literacy Program Logic Model

Resources (Library and Institution) -> Activities (What We Do) -> Outputs (What Others Experience) -> Outcomes (What Changes Short Term) -> Impact (What Changes Long Term)

Your Planned Work

Your Intended Results
Program Logic Model for ______________

<table>
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<th>Resources</th>
<th>Activities</th>
<th>Outputs</th>
<th>Outcomes</th>
<th>Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>In order to accomplish our set of activities we will need the following resources:</td>
<td>In order to address our problem or issues, we will need to accomplish the following activities:</td>
<td>We expect that once accomplished these activities will produce the following evidence:</td>
<td>We expect that if accomplished these activities will lead to the following changes in the short term.</td>
<td>We expect that if accomplished, these activities will lead to the following large-scale impacts in the long term.</td>
</tr>
</tbody>
</table>
SERVICE ASSESSMENT
Assessment Cycle (Handout)

Assessment Cycle
Lisa Janicke Hinchcliffe

- Make Decision/Implement
- Develop Inquiry
- Analyze Data
- Identify Evidence
- Gather Evidence
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?
ASSESSMENT CYCLE

Develop Inquiry

Identify Evidence

Gather Evidence

Analyze Data

Make Decision/Implement
“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

<table>
<thead>
<tr>
<th>Assessment Facets of Service Design and Delivery</th>
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<tbody>
<tr>
<td>Needs Assessment</td>
</tr>
<tr>
<td>Best Practices and Professional Standards</td>
</tr>
<tr>
<td>Resource Adequacy</td>
</tr>
<tr>
<td>Implementation Fidelity</td>
</tr>
<tr>
<td>Program Quality</td>
</tr>
<tr>
<td>Outcomes/Impact</td>
</tr>
</tbody>
</table>
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)

<table>
<thead>
<tr>
<th>Dimension/Criteria</th>
<th>Scale Level:</th>
<th>Scale Level:</th>
<th>Scale Level:</th>
<th>Scale Level:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Absent</td>
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</tbody>
</table>

- To Be Assessed:
## Example - Rubric

### Assignment: Annotated Bibliographic Item

#### Dimensions + Scale

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

Resources → Activities → Outputs → Outcomes → Impact

Planned Work → Intended Results

ITERATION AND ALIGNMENT
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:
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.”

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Never (1)</th>
<th>Sometimes (2)</th>
<th>Often (3)</th>
<th>Always (4)</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. The organization's mission, planning, and policies are focused externally—on supporting the customer's need for access to information.</td>
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<tr>
<td>B. How performance measures will be assessed is included in organizational planning documents, such as strategic plans and unit goals.</td>
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<td>C. Leadership commits to, and financially supports, assessment activities.</td>
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<tr>
<td>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 otherwise communicated formally.</td>
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<tr>
<td>E. Relevant data and user feedback are routinely collected, analyzed, and used to set priorities, allocate resources, and make decisions.</td>
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<td>F. Assessment activities are supported by a Management Information System (MIS) or Decision Support Systems (DSS).</td>
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<tr>
<td>G. Services, programs, and products are evaluated for quality, impact, and efficiency.</td>
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<tr>
<td>H. Staff are supported to continuously improve their capability to serve customers and are rewarded for this.</td>
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<tr>
<td>I. Staff are rewarded for work and the application of new learning that demonstrates improved service quality or better outcomes for customers.</td>
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<tr>
<td>J. On-going staff development in measurement, evaluation, and assessment is provided and supported.</td>
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<td>K. Units within the library have defined critical processes and established measures of success.</td>
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<td>L. Individual staff develop customer-focused SMART goals—in an annual planning process and monitor progress regularly.(SMART = Specific, Measureable, Attainable, Results-Oriented, and Timely)</td>
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QUESTIONS/COMMENTS?

NEXT STEPS?

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