

FOLLOW THE RUBRIC ROAD: ASSESSING THE LIBRARIAN INSTRUCTOR

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INTRODUCTION

Teaching as a facet of librarianship has not had a long and prominent role in the history of the profession. Instruction, until the 1990s often referred to by the rather awkward phrase “bibliographic instruction,” became more important with the advent and increasing penetration of first stand-alone (CD-ROM) and then online databases into the arsenal of library resources. The traditional aspects of instruction, citation and subject heading decipherment, were supplemented by a need for teaching database searching methods and the online retrieval of full-text documents. Many librarians found themselves with rapidly expanding teaching roles, often with little or no training and preparation. While many library schools now offer courses in teaching pedagogy and even internships for instruction, these are frequently electives, and do not reach a fairly sizable percentage of library graduate students. Unlike the discipline of education, where teacher training obviously remains a core element of the curriculum, librarianship has only relatively recently had to address large and systematic aspects of instruction. Assessment of instructors is one such facet of teaching.

The assessment of instructors can take several routes. Three main mechanisms of review include a classroom visitation/evaluation, either done by a superior or peer, surveys of either students or instructors, and actual student outcome assessments, where student learning is directly evaluated. Classroom visitations are a traditional method, and still quite commonly the method of choice in the academy. Immediate supervisors gain direct evidence of an instructor’s performance

in the classroom, and many institutions require that visitations be done as a peer-review process, where peers, often senior colleagues, do the observation and produce a report for a candidate’s portfolio or retention, tenure and promotion (RTP) file. Surveys, unless unusually carefully prepared and administered, often suffer the drawbacks of brevity and the unfortunate tendency to resemble “customer service” feedback forms. With open-ended questions, however, they have the opportunity of generating significant feedback to instructors on teaching style, strengths and weaknesses. Direct assessment of student learning outcomes is attractive in that it aims to measure actual student learning, either through some sort of pre- and post-test scoring, or direct analysis of in-class activities or work that may be digested after the class is over. Drawbacks of this approach include the amount of time required to prepare and then analyze the data, and possible interference with the classroom pacing and activities.

Assessment, in both formative and summative forms, is not a trivial activity. While there are multiple ways for new librarian instructors to gain valuable guidance on their teaching activities (mentoring, observation, review of literature, and just plain experience) the summative assessment issues are fairly critical both for the candidate’s career and the quality of instruction at the university. A healthy percentage of academic librarians in the United States have the mixed blessings of faculty status at their institutions, and consequently must undergo the same and often rigorous evaluation necessary for retention, tenure and promotion for the teaching faculty. For most institutions, the categories of review include teaching (which must be modified for librarians depending on their primary assignment), professional growth and development (presentations, publications and other professional “output”), and service (to campus and/or community). Since librarians are increasingly engaged in teaching activities, it is appropriate

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to devote some productive energy to the formal assessment of librarian instruction.

As a case study, this paper will explore some of the issues of librarian instructor assessment, at both formative and summative levels, and suggest the use of a rubric as a practical tool to assist in the assessment of librarian teaching activities. The value of peer review for the profession is discussed, and some of the issues of formative vs. summative evaluation examined. Initial, informal review of the use and application of the rubric as an assessment tool is presented, with suggestions for further study.

PEER REVIEW

Peer review is a fundamental part of academic life, as librarians know as well as anyone. Peer review of new colleagues to establish their academic qualifications for the jobs for which they were hired is as old as the first universities in 12th century Bologna and Paris. It was always the established faculty members who reviewed their new members, so the process has a long and honored tradition. Contemporary universities often have detailed criteria for peer review, which has utility both for candidates, who know what qualities and activities they will be evaluated upon, and for institutions, which will be able to point to established benchmarks of quality when discussing the results of a tenure decision.

In the case of San Francisco State University, a large campus (almost thirty thousand students, of which almost six thousand are at the post-baccalaureate or master's level) in an even larger system, the California State University (CSU), the rules for review are codified by the Collective Bargaining agreement between the California Faculty Association and the CSU, and then often amplified by both individual campus policies and departmental guidelines. Career choices are affected by these policies, and consequently are treated carefully by reviewer and "reviewee" alike.

The traditional peer review process for the San Francisco State University Library meant a senior colleague would attend a librarian instructor's class session and provide a formal document outlining the quality of the instructor's session. The document became part of the instructor's RTP file, and was used for summative evaluation. With a relatively large number of new librarians on the tenure-track, the Library Education Committee felt the need for an improved mechanism for review. Among the drawbacks of the traditional review mechanism was the potential subjective nature of the review. Librarians by personality, training, and sometimes disciplinary focus, are apt to demonstrate a variety of teaching styles and methods, and reviewers naturally tend to notice specific teaching elements in comparison to their own style. In addition, no formal criteria guided the review, so that there was some anxiety amongst the tenure-track librarians about what aspects of instruction for which they were to be evaluated. The author and a junior colleague, Mira Foster, were charged by the Library Education Committee with developing an improved assessment mechanism.

While limited by the requirements of a peer-review process, we reviewed several possible approaches. A literature review did not reveal any immediately applicable review mechanisms in the area of instructor evaluation, and in fact we were struck by the relative paucity of such activity in the library literature. Both education and library literature paid a fair amount of attention to the use of rubrics for assessing student learning outcomes but instructor evaluation was almost non-existent in the library literature. This paper is an initial attempt to generate further discussion on this topic. We found that terminology could be problematic, and that while education literature used the term "rubric" precisely, library literature, and many other fields, did not always do so. A highly useful article on Oregon State University's peer evaluation program (Middleton, 2002) includes a "checklist" for peer evaluation without calling it a rubric.

An ACRL produced handbook, edited by Shonrock et al. (1996), included a wide range of forms, questionnaires, surveys and other tools for library instruction, and we found an outline for instructor assessment that looked promising. After reviewing rubric design principles in several other works, we were able to craft our own instructor review rubric. Rubrics have several appealing elements for assessment activities. They can be simple but powerful tools, are relatively easy to employ, and for us, they had the advantage of being "amphibious" in that it appeared we could employ them for both formative and summative evaluation.

RUBRICS

At their simplest, rubrics are nothing more than glorified checklists, annotated to separate out criteria and examine nuances of a given activity. The literature indicated that there are two basic "types" of rubrics: holistic and analytic. In the library world, Megan Oakleaf has done a great deal of study on the use of rubrics to evaluate student performance (2006, 2007, 2009).

An old, and perhaps oversimplified, view of university research divides academics into two camps, the "lumpers" and the "splitters." The former prefers to gather data into piles to examine likenesses and patterns; the latter finds great value in dividing any given object or phenomenon into small slices that can be examined from every angle, and analyzed with great precision and attention to detail. Some academics study the forest, others the trees. Holistic rubrics are used to generate a large-lens, single judgment of quality, and are often preferred for purely summative purposes (Mertler, 2001). Analytic rubrics, on the other hand, in the words of Arter and McTighe (2000), "divide... a product or performance into essential traits or dimensions so that they can be judged separately."

Since we wanted both a standardized grid of criteria on which instructors would be evaluated and a means of providing formative feedback to instructors, the analytic approach was most attractive to us. Additionally, we used the rubric to introduce new values into the instructional program, for example by including a series of categories on learning styles

in the rubric (see Section I, Part B in the sample rubric.) The draft was circulated amongst the library education committee, discussed and revised, and ultimately formally adopted by the library faculty as a whole in 2008.

RUBRIC IMPLEMENTATION

Using a single tool for both formative and summative functions raises some intriguing issues. While a rubric can generate data for either purpose, there are often considerations in their application. In our situation the rules regarding summative evaluation for a candidate's RTP file were strict and required strong, standardized controls. Our solution was to employ the rubric in a two-fold manner.

Before an individual review, the reviewer and the instructor meet and agree upon a particular class and time. Over the course of an instructor's career it is obviously valuable to gain a sense of the range and breadth of an instructor's activities, as many librarians conduct classes in different disciplines, or employ different teaching formats. The reviewer checks with the candidate on several pre-class criteria about the candidate's preparation, communication with the instructor of record, etc. (see sample rubric Section I, Part A.)

During the classroom visitation, the reviewer makes notes to complete the rubric grid, and then meets with the candidate afterwards to discuss the rubric score and engage in a discussion about teaching. The candidate has the opportunity ask questions about the scoring or teaching pedagogy, and this aspect is the most potentially useful for formative purposes. This discussion is informal and "off the record," and can provide important feedback to developing librarian instructors.

The reviewer then uses the rubric as a framework for generating a formal letter for the candidate's RTP file. The value of the rubric, as noted by several reviewers since implementation, is that the rubric insures that a wide range of teaching criteria are addressed. The reviewer is required to note a standardized array of teaching qualities, and this has helped provide a more thorough and extensive look at teaching effectiveness in the classroom. The formal letter is part of the candidate's portfolio, and is used for summative purposes for the RTP committee and other levels of university review.

CONCLUSIONS

Preliminary feedback is that the rubric has helped streamline, standardize and improve summative evaluation of the tenure track candidates. Candidates have greater confidence that they will be evaluated fairly (according to the same criteria as all the other candidates) and appreciate having set standards for evaluation. Reviewers, while experiencing some initial adjustment to the use of the rubric, find that they are noticing more aspects of candidate's classroom performance, and find the rubric a suitable guide for their formal document.

While a more thorough and more formal assessment of the use of the rubric lies in the future, after a suitable period of

data is generated, the initial sense is that this has been a useful tool, particularly for summative purposes. In our case, it was productive for the library faculty to engage in a discussion of appropriate teaching criteria for review, and doing so helped give greater definition to the educational program's goals.

A good deal of further research is not only possible but desirable however. It would be useful to compare different rubric types (holistic and analytic, simple and complex) to look at the data generated. Are there other tools that would do a better job either for formative or summative evaluation? How much depth is required? Should the tools be simple and flexible, or more complex and nuanced? A formal assessment study of the evaluation process would also be productive. Rubrics show promise of providing important data for librarian instructor evaluation, and are an underemployed tool for formative and summative evaluation.

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APPENDIX

Sample Rubric for Instructor Assessment at the J. Paul Leonard Library, San Francisco State University

SECTION I

Rating Scale:

1 = strongly disagree, 2 = disagree, 3 = neutral, 4 = agree, 5 = strongly agree, n/a = not applicable

A. Preparation

1. Communicated with course instructor before the session to determine learning objectives and activities	1	2	3	4	5	n/a
2. Learned about course assignment(s) specifically related to library research	1	2	3	4	5	n/a
3. Customized instruction session plan to curriculum, specific course assignments and/or faculty/student requests	1	2	3	4	5	n/a
4. Planned to cover an appropriate amount of material during the session	1	2	3	4	5	n/a
5. Assessed the existing needs and understandings of students before or at the beginning of the instruction session	1	2	3	4	5	n/a

B. Teaching Methods and Organization

6. Stated the agenda, purpose and scope of the session clearly during the introduction	1	2	3	4	5	n/a
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7. Addressed different learning styles during the session						
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a. Addressed needs of audio learners	1	2	3	4	5	n/a
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b. Addressed needs of visual learners	1	2	3	4	5	n/a
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c. Addressed needs of kinesthetic learners	1	2	3	4	5	n/a
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8. Provided appropriate supporting materials to accompany the session	1	2	3	4	5	n/a
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9. Allowed sufficient time for students to finish tasks	1	2	3	4	5	n/a
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10. Facilitated student participation	1	2	3	4	5	n/a
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11. Assessed students' understanding and progress throughout the session	1	2	3	4	5	n/a
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12. Concluded session by summarizing important ideas, techniques etc. covered	1	2	3	4	5	n/a
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C. Communication and Classroom Management

13. Spoke with appropriate clarity, pace, tone of voice, and volume	1	2	3	4	5	n/a
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14. Questions and responses						
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a. Posed questions to students throughout the session and allowed sufficient time for student answers	1	2	3	4	5	n/a
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b. Asked questions to students that addressed different levels of understanding	1	2	3	4	5	n/a
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c. Solicited questions from students, answered questions, and gave helpful feedback to students	1	2	3	4	5	n/a
15. Maintained good rapport with students	1	2	3	4	5	n/a
16. Respected and encouraged different points of view	1	2	3	4	5	n/a
17. Handled difficult situations effectively	1	2	3	4	5	n/a
18. Informed students of opportunities for, and encouraged use of, research assistance, including personal availability as appropriate	1	2	3	4	5	n/a
19. Describe the notable personal characteristics and mannerisms that helped or hindered the instructor's presentation.						

D. Content

20. Introduced students to subject appropriate resources and tools	1	2	3	4	5	n/a
21. Introduced students to timely and up-to-date library materials	1	2	3	4	5	n/a
22. Used subject specific or topical examples	1	2	3	4	5	n/a
23. Adequately defined unfamiliar terms and concepts	1	2	3	4	5	n/a
24. Covered an appropriate amount of material during the session	1	2	3	4	5	n/a
25. Provided an appropriate orientation to specific JPLL resources and services	1	2	3	4	5	n/a

SECTION II

Open Ended Questions (for observer to develop report/letter)

1. How did the instructor address different learning styles during the session?
2. What resources did the instructor cover?
3. What research techniques did the instructor cover?
4. What concepts did the instructor cover and how were they described?
5. How was the session agenda structured? Describe the agenda/activities, etc.
6. Demonstrated strengths
7. Opportunities for improvement