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Ride, SALI, Ride: A Dashboard Approach to Instruction Program Management

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RIDE, SALI, RIDE: A DASHBOARD APPROACH TO INSTRUCTION PROGRAM MANAGEMENT

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INTRODUCTION

Like most other libraries, our librarians and library staff at the University of Michigan Library teach a wide variety of course-integrated and open workshops. When a library instruction session is requested, multiple administrative pieces need to fall into place before the session can occur, such as finding and reserving a room, scheduling an instructor (and getting the correct information on various calendars), and creating/attaching an evaluation form. At a large library such as ours, this is particularly challenging because we have many different room choices across multiple buildings, and several administrative units who are charged with this task. For years, we juggled multiple systems to schedule rooms, instructors, evaluations and record statistics. This not only resulted in double and sometimes triple data entry, it was also extremely confusing for library instructors to remember how to access all of these systems. As a result, statistics and evaluations frequently were left incomplete. As new technologies were adopted at the University and the library was reorganized, the opportunity arose to create a single, integrated system to manage all of these activities.

CREATING A ONE STOP SHOP

One of the important aspects that we knew we wanted was integration with the University's authentication system; we didn't want people to have to have yet another login and password. We also wanted to make sure that the tool could handle the strain we were sure to put on it—our library offers around 1300 sessions each year, taught by around 90 different instructors. Throughout the year, and certainly at the end of the year, various departments need to access aggregate statistics, and we didn't want to have a separate tracking mechanism for that, so that tracking feature also needed to be a part of this tool.

As we developed the tool, we considered who would be using it, and what their needs were. We determined there were essentially three user groups: faculty or graduate student instructors who would ask for sessions (requestors); librarians and library staff who would conduct the sessions (instructors); and the people behind the scenes who dealt with all the administrative pieces such as finding rooms, assigning evaluations, and so on (schedulers). We wanted a site where all these people could get what they needed, with the convenience of having it all in one place. Because the University of Michigan is a Google Apps for Education institution, we also wanted integration with individual and room Google calendars. In the next sections, we describe the individual needs of these three groups.

Requestors

Requestors need an easy to find page where they can submit all their information at once, eliminating tiresome back and forth emails hammering out the basic details. Because many faculty teach the same course semester after semester (or year after year), we wanted to make it easy for them to duplicate a previous request and adjust the dates, times, etc. without having to fill in items that haven't changed such as course, course number, and basic assignment. Faculty may also be flexible on their dates—for example, the library session could occur during the Monday or Wednesday class of a particular week. We wanted faculty to be able to offer alternative dates/times (again, eliminating emails trying to find a different time) as well as the ability to create multiple requests from a single request (the faculty member wants the same instructional session for all three sections of the same class, each at a different date/time, but the same basic content). Faculty can also upload a syllabus and course assignments.

Because not all faculty have had a library session before, or those who have may want to do something different, we wanted to showcase the types of instruction sessions we do. There is a menu detailing various topics faculty can choose from such as Finding Articles, Evaluating Sources, or Data Visualization. We also wanted to include the approximate time needed to cover the material requested, so the faculty member has a realistic idea of how much can be done in the time they have allotted.

Figure 1: Session Request Form

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Instructors

Even though we have a form for faculty to fill out, we all know that librarians and library staff will receive direct requests via email or other conversations. Additionally, our library offers hundreds of "open" sessions each year—sessions not designed for a specific course, but rather open to anyone on campus who is interested in attending. Therefore, our librarians need to be able to create requests as well, and have the same tools as described above (offer alternative dates, create multiple from one, reuse, etc.). We wanted the librarians to also be able to "claim" the session as the instructor as they created the request, so they didn't have to go to a separate step to do this.

Not all librarian-created sessions need a room or other mediation from a scheduler; sometimes the librarian goes to the class, and just needs to record statistics. Again, we wanted a single place, so at the end of the year, we can just look in one location for all the statistical information. Even for mediated sessions, instructors need the ability to record the statistics, so that needed to be a component as well.

When an instructor claims a session (or one is assigned to them), we wanted the session to appear on his/her calendar. We also wanted some basic information to appear in the description of the calendar event, so we have added a link back to the specific session, what room the session is scheduled in, and who the requestor is, in case the instructor needs to contact him/her. It was very important that the calendars updated with any changes, so instructors have the most up to date information at their fingertips.

Once requests are made, instructors need the ability to go to the tool and see what sessions haven't been claimed yet, and also see specifics about that session such as the request details, attached assignments and so on. Because we do evaluations for most sessions, instructors need a page where they can send students to fill out evaluations, and instructors also need to be able to see their evaluation results, so they can continue to improve their instruction. All students are directed to a single web page for all course evaluations. This way it is extremely easy for instructors to remember the URL of one page or to include a link to this page in a LibGuide created for the course.

Schedulers

One of the primary requirements for schedulers was to have a simplified workflow and, where possible, automatic notifications. Because they coordinate all of the pieces—scheduling rooms, assigning instructors (or following up on sessions that haven't been claimed), creating and connecting evaluations to a session, etc., streamlining was extremely important, as was the ability to see who was working on what session, so multiple schedulers weren't trying to work on one request. The integration with the Google calendars—for the rooms, for the instructors, and for the overall instruction calendar—was also essential. When dates or other information changed, or when a session was cancelled, updating the calendars needed to be automatic and seamless.

The scheduler's Dashboard is, by necessity, a bit more complex—they need to easily be able to see if a session is missing any one of the following: an instructor, a scheduled date, a location, an evaluation, or statistics. By creating tabs that search for each of these missing items, schedulers can easily track on sessions that need follow up. Because every request can't be met without changes, they also needed a way to track email communications with the requestor. By emailing from within the tool (rather than from an individual's email), all of the traffic is together, so if a different scheduler needs to access the session, he or she knows exactly what is going on. This also implies the ability of the scheduler to change any information such as date, time, location, etc.

Schedulers also have administrative rights to add rooms or evaluations, and to designate roles (such as instructor). This way, the programmers don't have to be involved to make these type of changes, and the schedulers can make the changes as needed.

Figure 2: Scheduler's Dashboard

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IMPLEMENTATION

Working closely with the programmers in the Library Technology Incubation Group (LTIG), we spent the spring and most of the summer of 2013 discussing, testing, and tweaking the tool. The schedulers were an integral part of our initial test group, since in many ways, this tool was about changing and simplifying their workflow. After we launched the tool (and did several training sessions for library staff), we made many more changes—for example, adding a "managed by" option, so schedulers could tell if someone was already working on a request or not. There were also some load issues; as more and more sessions came into the system, page loading time slowed down and the programmers had to change scripts and sorts to optimize the code on the pages. Additionally, programmers worked closely with our UX group, and changed the site to be more accessible for both requesters and schedulers.

We kept calling it "the scheduling tool" or "the new tool" and we knew we needed an easy name for people to remember. Several of the librarians offered suggestions, but the one that stuck was SALI – the Scheduling App for Library Instruction. Through April 2014, we have almost 1100 sessions in the system, and most of the bugs seem to be worked out. We occasionally receive suggestions from library staff on how to clarify wording or change the layout of an option to improve workflow. As browsers and other technology change, every now and then there are unexpected problems. The programmers are very responsive, and in addition to troubleshooting, they are also looking for ways to improve the speed of the tool.

The instruction summary report is an aggregate of all of the sessions in the system that can be searched, sorted, and downloaded. This can be accessed by any library instructor, so he/she can also use it for annual reviews, follow up with individual instructors and so on. The instruction summary allows us to sort by unit so that we can examine teaching patterns of libraries/units over time, for example we can see trends in instruction provided by the Science Library. The ability to track sessions by type (course-integrated, open workshop, community session, etc.) provides us with the capability of analyzing trends in the types of instruction sessions we are providing over the years as well. This data is extremely helpful in determining if we are meeting goals in the areas of broader outreach to the community and integrating library instruction into higher levels courses in various disciplines.

CHALLENGES

One of the biggest challenges for us was finding the time—while this type of work is typical for the programming group, the development of this tool was an "add on" for the librarians who worked with them. Knowing that the end goal was improve efficiencies and simplify workflows, it was certainly a worthy investment, but there were some delays as we tried to gather all the players. As with any new tool, there were certainly kinks as we launched the tool—some were with the tool itself, and some were caused by the learning curve associated with any new tool for the librarians and schedulers. Additionally, because we are so decentralized, this also changed the workflow for many throughout the library system.

We use Qualtrics for our evaluations, and unfortunately, there is not a direct integration with the SALI. It works, but it is a multistep process for the schedulers: creating the report in Qualtrics, copying then pasting the public URL into the SALI. Our programmers have done all they can, but until Qualtrics offers a predictable URL, this will continue to be time-consuming.

CONCLUSION

If your institution conducts large numbers of instructional sessions, you may want to consider creating something like this. One of the most important factors is finding programmers you can work with to develop it and who are open to meeting your needs. You will also need to consider who the key players are, and what their differing needs may be. To give you a head start, the University of Michigan can provide the SALI code as open source and hope others will contribute in its future development.

Images for Tables and Figures (Editor will put in body of the text later)

Figure 1

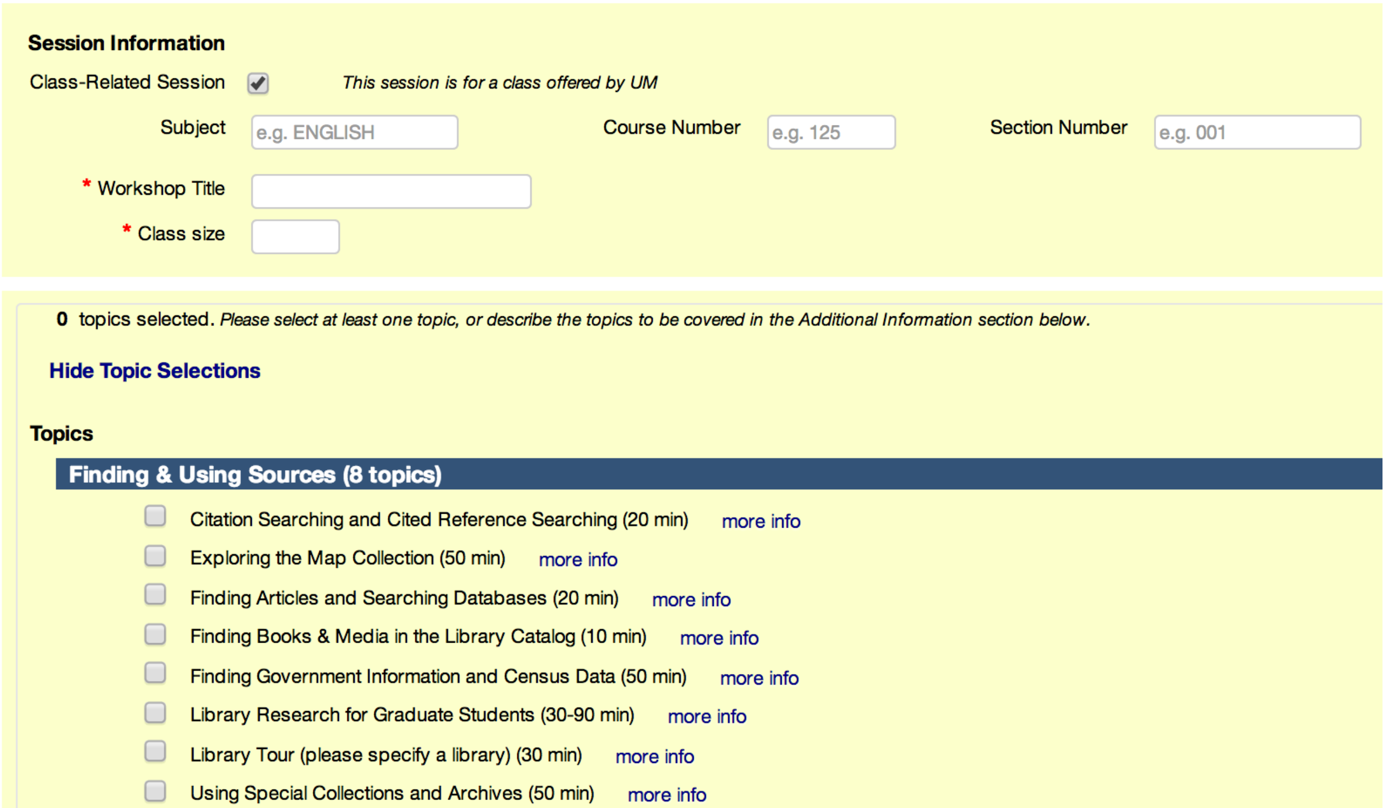

Figure 2