

THE PATH TO ASSESSING LIBRARY INSTRUCTION: USING PROJECT MANAGEMENT TECHNIQUES TO GUARANTEE RESULTS

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ASSESSMENT FOR ACCOUNTABILITY

Academic institutions across the country increasingly require that libraries incorporate assessment measures into instruction programs. One reason for such a requirement is accountability. Academic libraries must show that they are accomplishing the goals of their mission, while demonstrating to patrons the benefits of using library services. Another reason for requiring assessment is to evaluate instructors and instruction programs. At academic institutions, assessment is often used to evaluate the capabilities of students, but it can also be used to measure the effectiveness of an instructor and of the entire instruction program. Regardless of how the assessment method is used, the end result should lead to improved services.

As librarians begin to search for methods of assessing library instruction, they need to consider four very important questions: What are the objectives of the assessment project? What data will be collected (this is often a very important point to consider in designing assessment tools as the type of data collected really does impact the quality and depth of assessment that can be conducted)? How will the data be analyzed? For what will the data be used? These questions can assist in establishing which method of assessment to implement.

When I began as an Instruction Librarian, I wanted to know how effective I was as an instructor, so it seemed clear that I would need an assessment method that would provide immediate feedback. In considering my options, I had to take into account the small size of the Instruction Unit at Michigan

State University (MSU) Libraries and recognize that I had limited resources. I had to be aware that it would neither benefit the library nor our patrons to invest in an elaborate system that would take a large department of people to execute, and that I should select a more sustainable approach based on ease of use. These considerations all led to the realization that I would need a method that could be implemented promptly – that would produce results that could be conveniently and easily processed by the small Instruction Unit at MSU.

The following narrative details the experience that I had proposing the use of an Audience Response System, also known as “clickers,” to administrators at MSU Libraries for the purpose of assessing library instruction, and the process that I undertook to implement this method of assessment.

PROPOSING CLICKERS TO ADMINISTRATION

As a new library professional, having just finished my first year as a Reference and Instruction Librarian at MSU, I suggested to the Library Instruction Coordinator that clickers would be a great way to encourage student participation and capture feedback on students’ ability to use library resources. I had recently attended a presentation at a LOEX conference that demonstrated very simple plug and play equipment (plug and play in computing and technical circles, refers to the simplicity of using hardware that is ready to use once it is plugged in). Upon speaking with the Instruction Coordinator, I was informed that the library had been considering clickers for some time. As noted earlier, I was fairly new and had no awareness of the vast difference between considering an innovation and actually obtaining approval for it from administration, so I ardently continued for some time to inquire about the use of clickers in our instruction program.

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I continued along this informal and ineffective path for almost two months before I realized that a formal proposal would be best. To prepare, I researched the two versions of clickers that the university had recommended and developed a proposal based on the information gathered. When I spoke with the Instruction Coordinator about the clickers presented at LOEX, she suggested that the library would probably want to purchase the version recommended by the university. However, I discovered during the course of my research that the price of the university-recommended clickers was considerably higher than the alternative I had seen presented at LOEX, and with this information I created a separate cost/benefit document. Recognizing that this information was valuable, not just to me but possibly to the administration, was the first of a long list of truly significant lessons.

When I had compiled all of the information that I had gathered (with the exception of the cost figures relating to the less expensive clickers) into a comprehensive document, I forwarded the proposal to the Associate Director of Public Services and to the Instruction Coordinator and requested a meeting to discuss the idea. The Associate Director was more than happy to meet and discuss the idea of using clickers but definitely needed to be sold on the idea of purchasing the equipment. In the proposal, I recommended that a pilot study be conducted to determine whether or not this particular method would be the best fit for the organization. I made sure to incorporate guidelines for the pilot, including a timeframe for analyzing data, into the proposal submitted to the Associate Director. I also committed to submitting a written report of the final results of the pilot study.

Developing a formal proposal was important because it presented the rationale behind the initial idea, as well as a solid plan of action. It also demonstrated to the administration that I was committed to the project. In order to successfully sell this idea to the administration – to convince them that it was a great idea worth attempting and that I would follow through – I needed to do the necessary legwork. The formal proposal was not only the best way to approach the administration, it was also the best way to ensure that the action plan was thoroughly devised.

At the time, I could tell that the Associate Director was a bit apprehensive about the proposed idea. Given that the university-recommended clickers cost more than twice the amount of the “LOEX” clickers that I wanted the library to purchase, I recognized that this information might make the difference between the Associate Director merely considering and actually granting approval to purchase the equipment. Because of this, I presented the cost information for the less expensive clickers as a final appeal.

After approval of the proposal, as the manager of the project I had the responsibility of deciding who needed to be involved. Recruiting help was not difficult as members of the Instruction Unit were more than willing to support the project. Having previously discussed the idea with colleagues in the Instruction Unit, I was equipped with insight into what kind of

support I could expect to receive. My other responsibilities as Project Manager were to provide supporters with details of the action plan and share how I envisioned the project’s outcome would be realized.

Communicating the purpose and intended outcome required a great deal of thought about the goals and objectives of the project. Also, the administration had requested that contact be made with the Libraries, Computing & Technology Training Program (LCTTP), a department outside of the library, to make sure that implementing clickers would not interfere with any other ongoing projects. Because I did not have any contacts in or familiarity with this outside department, I asked the Instruction Coordinator to contact them, and she ensured that there would be no conflicts with the clickers being implemented in the library. She also confirmed that the particular clickers that I had proposed would work with the university’s existing technology.

IMPLEMENTATION

I made an appointment to have a regional sales representative come to the library and demonstrate the equipment. I invited one of the library’s Information Technology Professionals to sit in on the demonstration so that he could offer advice and provide the technical expertise that I lacked. This ensured that if any questions were later raised about technical matters, I could consult with someone familiar with such issues at the library. Having the support of an Information Technology Professional turned out to be essential when it came time to answer the administration’s questions related to technical issues and concerns about using clickers with the library’s existing technology instruction.

After the submission of the proposal, the meeting with the Associate Director of Public Services, and the demonstration session with the sales representative, all that remained to be resolved was obtaining the authorization to make the purchase. Once the Associate Director authorized the purchase of the equipment, I was then able to submit an order request to accounting (which meant that I then had to wait for accounting to actually place the order). After accounting placed the order, I then patiently awaited the arrival of the equipment.

Patience was key! In large institutions things happen much more slowly than one might expect. The larger the institution, the more time it may take to maneuver through its various policies. On the other hand, at smaller institutions one may find oneself stalled due to funding issues, so a certain amount of tenacity is necessary regardless of an institution’s size. It can be quite challenging to practice patience, especially when there is a deadline and/or the end of the term is fast approaching, but delays were not the biggest challenge I wound up facing.

CHALLENGES

Identifying the resources needed and knowing how long it would take to produce results were also considerable obstacles. At the beginning of the process, I knew that I would need resources like materials and people, but I really had no idea

how much I would need or for how long. It is crucial to have enough people not only to set a plan into motion, but also to see it to fruition. Other key resources needed are communication, energy, and motivation. Being the project manager involved continuous communication with the Instruction Unit to ensure that every role was clearly defined. I also had to be sure to use resources wisely and not use up all of the team's energy at the front end of the project. To achieve any kind of success, it is always necessary to have enough time, energy, and motivation to complete the project.

How long is the path to assessment? It can be either long or short depending upon the desired outcomes. That is why it is vital to set up guidelines in the early stages of a project's development. Guidelines assist in answering important questions and provide an understanding of intended goals and objectives. Even with a clear plan, however, there is no way to be sure how long the process will take. For these reasons I chose an assessment method that would not exhaust available resources and that could be implemented rather quickly. While I did my best to make sure that all logistical aspects of the implementation process were on track, the most challenging portion of the project still remained.

Effectively using the data that is collected during the course of any assessment project is one of the greatest challenges that individuals face when attempting to assess a service or program. A common mistake is to spend too much time implementing the method and collecting the data and to leave little time for analyzing and making use of results. With this sort of approach, near the end of the project, when it comes time to analyze data, all resources have already been exhausted. Without these results, there is no way to measure the success of a project or make new discoveries about users. If I had not allowed time to analyze the data collected, I would know no more about my users at the end of the project than when I had first proposed the idea.

VALUED LESSONS

Assessment may sometimes seem like just another requirement imposed by the administration, but it can be a very important source of growth to an instruction program. By asking important questions and discovering new things about users, assessment also contributes to the professional development of instruction librarians. This was the most beneficial aspect of incorporating assessment into my instruction sessions. As a new Instruction Librarian, I had no reference for good or bad experiences. This method of assessment allowed me to assess student learning while simultaneously evaluating myself as an instructor.

In addition to growth, I learned many valuable lessons during the process of proposing and implementing this method of assessment. The first lesson I learned was that I had to have a clear idea of what I wanted to accomplish, along with the perseverance to follow through with the idea despite challenges. I also learned that just because an idea is not new does not mean that it should not be attempted. The third lesson that I learned

could be intuited from the first: that I had to be prepared to justify my ideas with valid support. Having the information on the less expensive version of clickers illustrated that I was committed to the project and appropriately concerned about costs. Showing up prepared ensured that I would not unnecessarily impose upon the Associate Director's time.

One additional lesson from this experience was that I should not be afraid to branch out and sometimes work individually to accomplish the same goals as the team, but with a different perspective. This last lesson was perhaps the most important for me, not only in terms of professional growth, but also for the entire instruction program at MSU Libraries. Working as a team can yield successful results, but working independently can lead to successful results as well.

The importance of following through with assessment projects cannot be emphasized enough. The analysis of the data collected during the process is of fundamental importance, not only for documentation or presentation to administrators, but for the progression of library services and librarians. If the data is not analyzed and put to use, all of the hard work done at the front end of the project will have virtually no influence on users or the instruction program. There was no way of predicting a successful outcome at the start of this project, of course, but the method wound up working quite well with other ongoing assessment initiatives at MSU Libraries. As a result of my work on this project, I had an opportunity to present the results of the pilot at an assessment conference last fall. Needless to say, there are clearly a number of potential benefits to employing well conceived and well implemented project management techniques.
