Discovering What You Need to Know

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Discovering What You Need to Know

Imposed Assessment
Key Drivers for Assessment
Closing Gaps
Understanding Users
Leveraging Strategic Plans for Assessment
Imposed Assessment

• Some assessments are **imposed** (e.g., assignment from supervisor, asking a question for someone else: other institutional unit).

• The information needed **may not be completely understood** or may even be misunderstood.

• Assessment practitioners may have difficulty articulating or adjusting their project to accurately reflect an imposed assessment goal/need.

• Motivation of practitioners can be **more extrinsic than intrinsic**; there may be heightened anxiety about “getting it right.”

• If possible, seek the **source of the query** (e.g., originator of question) and ask open and sense-making questions to fully understand the goals/needs of an imposed assessment as well as relevant nuances.

Learning More

Use open-ended questions to understand more about the purposes of an assessment.

• What is your basic concern about…?
• Could you help me understand…?
• How could we fix…?
• What do you want to do next?
• How else could we…?
• How can I be of help?
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Assessment may be about Values and Priorities.

- **Articulate:**
  - Value of the user
  - Role of library workers
  - How things are accomplished
  - Type of work that is valued
  - Role of assessment

- **Serve as guiding principles of library assessment**

- **Influence attitude/behavior of assessment practitioners**

- **Demonstrated by attitude/behavior/ingrained operating rules of assessment projects**
Assessment may be about Changes and Trends.

Changes outside the library (e.g., community, institution, technology)
- Community connections and engagement
- Trends directly observed
- Industry reports

Internal patterns
- Statistics, records of transactions
- Staff observations
- SWOT analysis
Environmental Scanning Factors

https://stock.adobe.com/uk/search?q=pestle%20analysis
Assessment may be about Resources.

- Monitoring budgets
- Making one-time purchases
- Anticipating “wish list” purchases or strategic growth in advance
- Developing budget requests
  - Statement of needs
  - Clearly defined goals
  - Articulation of impact on users/community
  - Outcome evaluation plan
  - Existing resources leveraged
  - Budget (costs, including staff time, equipment, etc.)
- Evaluating services
Assessment may be about Sunsets.

Questions to ask in advance about stopping:
• How long has the service/collection/facility existed?
• Why was it started? Who was the target audience?
• What data exist on its use?
• Why is it not successful now?
• What would the library gain by ending it?
• What would the library lose by ending it?
• What would it take to resuscitate it?
• Are there political reasons not to end it?
Assessment is probably about Closing a Gap.
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“Sense-making” is a label for a coherent set of concepts and methods used to study how people construct sense of their worlds and, in particular, how they construct information needs and uses for information in the process of sense-making.

Sense-making is central to all communicating situations, whether they be intra-personal, interpersonal, mass, cross-cultural, societal, or international.

Sense-making is behavior, both internal (i.e., cognitive) and external (i.e., procedural), that allows the individual to construct and design their movement through time-space.

Sense-making behavior, thus, is communicating behavior. Information seeking and use is central to sense-making.
Sense-Making Principles

- **Humans live in a world of gaps**: a reality that changes across time and space and is at least in part “gappy” at a given time-space.

- The **purpose of sense-making is to make possible better design of practices and systems**.

- The **bottom-line goal is to find out what users—audiences, customers, patients, clients, patrons, employees—“really” think, feel, want, and dream**. The repeated failures of surveys and studies and the well-documented gap between how administrators/experts describe users and publics and the realities of what users and publics think and do, particularly when the going gets tough, became sense-making’s driving problematic. Looking to the gap allows us to break out of picturing users only in the reflections of our own mirrors.

- The sense-making metaphor provides **guidance for thinking about people, talking to them, asking questions of them and designing systems to serve them**. In capsule, it says **look to the gap**: This is where you will find the action in sense-making and sense-unmaking; in communicating; and in the creating, seeking, using, and rejecting of information and knowledge.

Dervin’s Sense-Making Metaphor

http://en.wikipedia.org/wiki/Brenda_Dervin
Sense-Making in Libraries

• The sense-making mandate for change is not directed toward users, but rather toward us—researchers and designers.

• The question is how can we build systems which are maximally useful and responsive to real living breathing human beings and the real nitty-gritty, changing conditions of their work and lives? The switch is subtle but important. The question is not how can we reach them, but how can we change ourselves to be useful to them?

• Sense-making mandates respectful listening to users as theorists and knowledge makers in their worlds and as actors who, if asked, can tell you what they need.

Kuhlthau & Information Search Process (1985)

1. **Initiation**: when a person first becomes aware of a lack of knowledge or understanding and feelings of uncertainty and apprehension are common.

2. **Selection**: when a general area, topic, or problem is identified and initial uncertainty often gives way to a brief sense of optimism and a readiness to begin the search.

3. **Exploration**: when inconsistent, incompatible information is encountered and uncertainty, confusion, and doubt frequently increase and people find themselves “in the dip” of confidence.

4. **Formulation**: when a focused perspective is formed and uncertainty diminishes as confidence begins to increase.

5. **Collection**: when information pertinent to the focused perspective is gathered and uncertainty subsides as interest and involvement deepens.

6. **Presentation**: when the search is completed with a new understanding enabling the person to explain his or her learning to others or in someway put the learning to use.

### Information Search Process (ISP)

<table>
<thead>
<tr>
<th>Model of the Information Search Process</th>
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<tbody>
<tr>
<td>Initiation</td>
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<tr>
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<tr>
<td>Feelings (Affective)</td>
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<tr>
<td>Thoughts (Cognitive)</td>
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<td>Actions (Physical)</td>
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Imposed Assessment
Key Drivers for Assessment
Closing Gaps
**Understanding Users**
Leveraging Strategic Plans for Assessment
Determining User Areas of Need/Interest/Gap/Strength

1. What is the user’s goal/purpose/mission?

2. What is the user trying to achieve?

3. What does the user actually achieve? (Is there a match or a gap between questions 1 and 2? If a gap exists, why?)

4. What is important enough to the user for them to allocate resources? Follow the action/money/time/effort!
Academic Library Users

**Students**
- High school
- Prospective
- First-year
- Majors
- International
- Co-curricular groups
- First generation
- Honors
- Graduate
- Special populations

**Faculty**
- Tenured/tenure-track faculty
- Non-tenure-track faculty
- Research faculty
- Part-time faculty
- Adjunct faculty
- Instructors/lecturers
- Teaching assistants

**Administration**
- Presidents/chancellors/provosts
- Deans
- Faculty senate
- Department/unit heads
- Committee chairs

**Other**
- Local community
- Parents
  - Of first-year students
  - Of first-generation students
- Employers
- Graduate schools
- Accreditors
  - Regional
  - Professional
What do your users need/want to know?

For example, students have many goals including:

- learning
- achieving at a level that enables entry to the “next step”
- securing employment, grad school acceptance, next step
- pursuing personal interests
- managing time effectively
- feeling welcome, sense of engagement and belonging
- safety
Possible Areas of Interest

Students
- Recruitment
- Enrollment
- Retention
- Completion
- Graduation
- Learning (outcomes)
- Achievement (GPA, tests)
- Experience
- Engagement
- Employment
- Earnings
- Alumni Lifelong Learning

Faculty
- Recruitment
- Tenure & Promotion
- Teaching
- Service
- Research
- Productivity
- Grant-Seeking
- Patents, Technology Transfer
- Innovation, Entrepreneurship

Institution
- Prestige, Brand
- Affordability
- Efficiencies
- Accreditation, Program Review
- Sustainability
- Diversity
- Inclusion
- Internationalization
- Athletics
- Development, Endowments

Community
- Local, Global Workforce Development
- Local, Global Economic Growth
- Local, Global Engagement
- Community-Building
- Social Inclusion
- Social Justice
- Faith-Based Initiatives
Users as Partners, not Subjects

• Users can **directly and immediately benefit** from assessment projects that include them **early and throughout the process**.

• Users should be involved throughout the entire process, from the **formulation of the problem** through the **interpretation of findings** and **actions taken on those findings**.

• User involvement can ensure the assessment itself **serves the community of users** and increase awareness of problems and commitment to solutions.

• Results should be used as a process of **continuous communication and improvement** stretching over time leading to **meaningful change** in users’ lives.

Library Impact

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Leveraging Strategic Plans for Assessment

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Insights into Users in Organizations

Questions to ask:

1. What is the organization’s goal/purpose/mission?
2. What is the organization trying to achieve?
3. What does the organization actually achieve? (Is there a match or a gap between questions 1 & 2? If a gap exists, why?)
4. What is important enough to the organization for them to allocate resources? Follow the action/money/time/effort!

Where to look?

• Research investigating similar organizations
• Critical and active reading and analysis of artifacts, documents, or other publications and presentations created by organizations
  – mission or vision statements
  – strategic plans
  – defined lists of values or goals
  – annual reports
  – press releases
Purpose of Strategic Plans

Set direction.

What do we want to achieve?

Monitor performance.
How will we know how well we’re doing?

Develop plan & strategies.
How will we achieve what we want to do?
Role of Strategy

- Define the organization.
- Set direction.
- Focus effort.
- Provide consistency.
- Improve services.
- Increase customer satisfaction.
- Enable better marketing & reporting to stakeholders.
- Provide clarity of thought throughout organization.

On the other hand…

Diversity of thought, “mistakes”, and problems all can result in improvement.

What is your library’s “strategic plan”?

• Described in organizational documents.
• Discernable from observing an organization.
  – Who are the major players?
  – How are resources used?
  – What goals are actually achieved?
  – What values are reinforced, rewarded?

Components of a Strategic Plan

• Mission statement — Reason the library exists; succinct, understandable
• Values — Basic beliefs/principles that guide practice; organizational culture
• Vision — What the library will be like in the future
• Customer groups and services — Identify and describe
• Strategic focus — Key factors that separate library from its competitors
• Statement of initiatives or focus areas — Expressed in goal language with performance measures
• Critical success factors — Important things that the library must do well to be successful today and in the future
• Should be: Continuous, systematic, process-driven, in line with operating procedures and policies, measurable, unifying

Mission

- Defines what the library does and does not do
- Distinguishes library from competitors
- Specifies the library’s customers
- Identifies benefits of using the library
- Focuses on the present
- Creates shared understanding of library’s purpose
- Is brief
- Is clearly written with no jargon

Vision

- Includes long-term goals and success criteria
- Serves as a focus for decision making, resource allocation, and identifying activities that should be pursued
- Is inspiring
- Helps combat fear of change, fatigue, frustration and lack of cooperation
Strategic Choices

**Be better.**
- Focus on the current situation.
- Try to improve the situation.
- Make improvements, refocus on quality programs, empower employees, etc.

**Be different.**
- Identify new customers to serve.
- Identify new needs of current customers that are not being satisfied.
- Find new ways of delivering and distributing services.

Strategy — Differentiation

Libraries can separate themselves from competitors by:
• Quality
• Customer orientation
• Innovation
• Technical superiority
• Distribution
• Support
• Brand
• Service offering changes

Rather than being all things to all people…libraries can focus by:
• Product/service
• Geographic area
• Market segments

Operational Excellence

Providing users with quality services and products with minimal difficulty.

- What level of quality can be achieved and maintained for each service?
- Can technology help?
- What changes would make the service better?
- What barriers to service could be removed?
- How should the performance of each service be measured?

Innovative Services

Offering new and improved services to users.

- In a perfect world, what services could we offer users?
- Can we make our existing services better?
- What can we eliminate to put more resources into important services?
- Are there new options, technologies, etc. that can help?
- What staff skills can we use?

Customer Intimacy

Segmenting and targeting user markets with tailored offerings.

- How can we better serve users?
- What new segments can we target?
- Do we know our users well enough?
Strategy — Service Usage

Libraries can increase use of services by:

• Increasing frequency of use
• Increasing quantity used
• Sharing information not usually shared
• Appealing to library users who do not use the service

Questions to Consider When Analyzing a Strategic Plan

- What assumptions does the strategic plan make?
- How is the information environment changing and does the strategic plan take change into consideration?
- What new tools are presented in or omitted from the strategic plan?
- Does the strategic plan identify what librarians know or need to know about users?
- What are the criteria does the strategic plan suggest to make decisions?
- What are the implications of choosing or not choosing a service to continue, improve, etc?
- Who are the library’s competitors?
- Could/should the library structure change to make goals easier to attain?
- Has the library committed the necessary resources to make goals attainable?
- How will librarians know when they have succeeded (success criteria)?

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