



## Performance Measures and Assessment: Critical Tools During Challenging Times

NISO Forum  
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1

## Building Your Own Assessment Plans



Presented by  
Larry Nash White, Ph.D.

June 1, 2009 Baltimore, MD

NISO Assessment and Performance  
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2

## Intellectual Walk-about



- Introduction
- What the literature says
- What research says...
- The best of assessment plans
- Landing the plane: progressive alignment
- One last thing...
- Questions

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3

3

## Introduction

Before we get started, I need a  
volunteer...



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4

4

## Introduction

Before we get started, I need a  
volunteer...



I promise it will only hurt for a little  
bit...

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5

7

## What the literature says

### Library literature on assessment planning

- General Overview
  - Little for assessment planning of whole organization; mostly aspects of the organization
  - Frequent use of outcomes assessment
  - Separate from organizational strategic plan

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8

## What the literature says II

### Library literature on assessment planning

- General Overview (cont.)
  - Primarily focused on effectiveness / outcomes (especially in academic, school libraries) and efficiencies (public libraries)
  - Little innovation from within LIS of metrics and use
  - Less complex processes and measures

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7

8

## What the biz literature says

### Business literature on assessment planning

- General Overview
  - Assessment planning of performance of whole organization and aspects of the organization
  - Frequent use of value, cost, ROI / ROA
  - Integrated into organizational strategic plan

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8

9

## What the biz literature says II

### Business literature on assessment planning

- General Overview (Cont.)
  - Primarily focused on value creation, cost avoidance, ROI / ROA
  - Regular innovation of metrics and uses
  - Complex processes, complex measures
  - Use of intangible assessment
  - Stronger culture of assessment

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9

9

## What research says...

### Library research on assessment planning

- Little research on assessment use and planning
- Focused on effectiveness / efficiency
- Inconsistent process, use of results
- Inconsistent evidence of culture of assessment

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10

10

## What research says...

### Library research on assessment planning (cont.)

- White (2002). Does Counting Count
  - Little assessment planning
  - Not integrated into strategic plans
  - Little semblance of culture of assessment
  - Inconsistent resource commitment to assessment process

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11

11

## What research says...

### Library research on assessment planning (Cont.)

- White (2002). Does Counting Count
  - Exclusive / internally focused assessment processes
  - Assessment planning (and results of assessment) not stressed, assessed, or accessed
  - Lack of planning contributed to a lack of perceived value in assessment (and results)

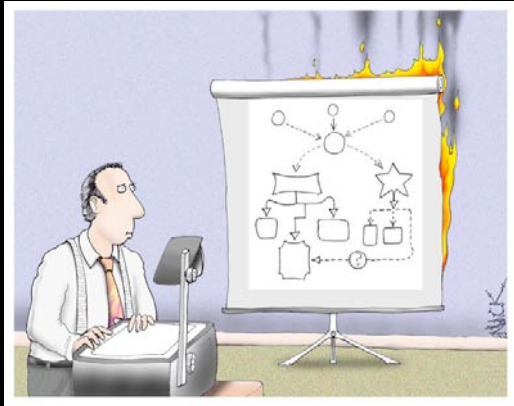
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12

## The best of assessment plans



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13

## Components of assessment plans: traditional format

	Efficiency	Effectiveness	RIO / ROA / Value	Educational Outcomes
Goals				
Objectives				
Metrics (indirect)				
Metrics (Direct)				
Data Collection				
Analysis				
Reporting				

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14

## Component uses of assessment plans: traditional format

V=Estimated Frequency	Efficiency	Effectiveness	RIO / ROA / Value	Outcomes
Goals	√√√	√√√	√	√√
Objectives	√√√	√√√	√	√√√
Metrics (indirect)	√	√	√	√√
Metrics (Direct)	√√√	√√√	√	√√
Data Collection	√√√	√√	√	√√
Analysis	√√	√√	√	√√
Reporting	√√	√√	√	√√

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15

## Proposed components of future assessment plans

	Stakeholders	Intangibles	Resources	Knowledge / Expertise
Strategic Needs				
Learning				
Entrepreneur / Innovation				
Accountability / Access				
Alignment				
Demonstration				
Anal./Feed.				

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16

16

# Landing the plane: the importance of progressive alignment



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17

# Progressive alignment

Major Library Service Environment Factors Affecting Library Assessment



Mission / Scope



Resources



Participation / Stakeholders



Technology

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18

18

# Progressive alignment

Major Library Service Environment Factors Affecting Library Assessment



Mission / Scope



Resources



Participation / Stakeholders



Technology

and some of the resulting service environment factors from their interactions

accountability, access, competition for services, distance education support, information literacy, innovation, participation, value

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19

19

# Progressive alignment

Progressive Alignment of Library Assessment Processes and Metrics to the Service Environment

Internal to the Library

Non-alignment

Practice Alignment

Process Alignment

System Alignment

Environmental Alignment

External to the Library

Mission / Scope

Resources

Participation / Stakeholders

Technology

Progressive Alignment of Library Assessment Processes and Metrics to the Service Environment

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20

## One last thing...

- A question...

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21

21

## One last thing...

- A question...
  - If you were identifying the most important or valuable things in the room, what would you list?

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22

22

## One last thing...

- A question...
  - If you were identifying the most important or valuable things in the room, what would you list?
  - Well,...

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23

## One last thing...

- A question...
  - If you were identifying the most important or valuable things in the room, what would you list?
  - Well,...
  - What if...

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24

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## One more last thing...



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25

25

## Questions

I'll be happy to respond to your questions...



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26

26