



**INCREASING THE EFFECTIVENESS OF EVALUATION FOR
IMPROVED PUBLIC LIBRARY DECISION MAKING AND ADVOCACY:
JULY 1, 2008 INTERIM REPORT**

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INCREASING THE EFFECTIVENESS OF EVALUATION FOR IMPROVED PUBLIC LIBRARY DECISION MAKING AND ADVOCACY

In December 2005, the Information Use Management and Policy Institute (Information Institute) of Florida State University began work on the Institute of Museum and Library Services (IMLS) award entitled *Increasing the Effectiveness of Evaluation for Improved Public Library Decision Making and Advocacy*. This study began December 01, 2005 and the original end date was July 01, 2008. In April 2008, the Information Institute requested and received a grant extension through July 1, 2009. This interim report provides an overview of activities completed and in progress from December 31, 2007 – July 1, 2008 and planned activities for the remainder of the project (i.e. through July 1, 2009).

The goal of this project is to develop a web-based instructional learning system, an Evaluation Decision Making System (EDMS) that functions as an evaluation management-support tool. To meet this goal, the project team is developing the EDMS web site that is capable of facilitating the selection, use, and management of evaluation approaches given data/advocacy needs and specific situational factors of local public library managers. Table 1 below, from the initial 2005 grant proposal provides an overview of remaining scheduled tasks for Phase IV of the project and an amended timeline for completion of the EDMS project.

Phase IV: Refinement of the EDMS (July 1, 2007 – July 1, 2009)			
	Task	Overview	Timeline
1	Continue revision of the EDMS	Based on the review of the findings from Phase III and discussions/meetings with project partners/advisory committee members the project team will continue to revise the EDMS and conduct ongoing formative evaluation of the EDMS.	Jul 1, 2008 – Sep 30, 2008
2	Final usability, functionality, and accessibility testing	Conduct summative evaluation efforts. Participants will include the project partners/Advisory Committee members, and other field testers.	Sep 1, 2008 – Nov 1, 2008
3	Project Partners and Advisory Committee Teleconference	Meet with project partners and Advisory Committee members via teleconference to review results of summative evaluation efforts and plan training sessions on use and benefits of the EDMS.	Nov 2008
4	Dec 31 annual report and next steps	Produce December 31, 2008 annual report that will include a summary of final revisions to the EDMS, results of summative testing, and next steps	Dec 1, 2008 – Dec 31, 2008
5	Instructional sessions	Conduct three to five training sessions on use and benefits of the EDMS.	Jan 1, 2009 – Jul 1, 2009
6	Dissemination and marketing activities	Meet with project partners and Advisory Committee members via teleconference to plan instructional sessions and dissemination/marketing/promotion of EDMS.	Jan 1, 2009 – Jul 1, 2009

Table 1: Phase IV planned tasks

Table 2 (below) provides an updated description of task activities the project team will conduct to complete phase IV of the project and produce a final project report for IMLS.

Phase IV Tasks and Activity Descriptions		
	Task	Activity Descriptions
1	Continue revision of EDMS based on internal results from usability, functionality, and accessibility efforts.	Complete development of modules and other key areas/aspects of the EDMS: <ul style="list-style-type: none"> • Review existing modules and improve them based on January 2008 suggestions from the partners/advisory committee; • Add additional interactive templates and sample reports; • Conduct ongoing formative usability and functionality evaluations; and • Improve usability and functionality of the web site;
		Revise and refine the EDMS based on formative evaluations conducted by study team members.
		Produce December 2007 annual report
2	Final usability, functionality, and accessibility testing	Field test EDMS – conduct summative usability, functionality, and accessibility evaluations
		Field test write-up and final revision/refinement of the EDMS
3	Project Partners and Advisory Committee Teleconference	Meet with project partners and Advisory Committee members via teleconference call to review results of summative evaluation efforts and plan instructional/training sessions.
4	Dec 31 annual report and next steps	Produce December 31, 2008 annual report that will include a summary of revisions to the EDMS, results of summative testing, and next steps
5	Training/Instructional sessions	Instructional/training sessions begin in selected national and state conferences (3-5)
6	Dissemination, marketing, and promotion activity planning with Advisory Committee, project partners, and others	Meet with Advisory Committee and project partners via teleconference call to plan and initiate preliminary dissemination and marketing/promotional strategies that include announcements of the availability of the system, dates of instructional sessions, and other activities commensurate with marketing and promotion of the EDMS. The ALA Office for Research will play a key role in these efforts.
		Begin EDMS dissemination and marketing/promotion activities
		Final interim report due July 1, 2009
		Final narrative report that includes summative assessment of the project goals and outcomes due October 26, 2009

Table 2: Phase IV tasks and activity descriptions

The project team and technology subcontractor continue to develop and refine the EDMS and anticipate completion of development activities (see task 1, table 2 above) by September 30, 2008. Upon completion of task 1, the project team will conduct the final summative evaluation of the EDMS (i.e. task 2 - usability, functionality, and accessibility testing) and report results of these activities in the next IMLS annual report, due December 31, 2009. Training sessions and marketing/promotion efforts will occur during spring 2009 (task 5 and 6 above). A final IMLS narrative report is due October 26, 2009.

EDMS OVERVIEW

Since December 2007, the project team has continued with the development of the EDMS. Figure 1 above presents ongoing development efforts by the project team that includes:

- Implementation of two additional instructional modules;
- Planning and initial development of instructional module support documents;
- Re-assessment of social networking features of the EDMS (i.e. Commons areas);
- Re-organization of interactive modules to include a new section of “Library Evaluation Tools” that includes the “Library Value Calculator” and “Local Conditions” modules;
- Preparation to add the 2005 NCES database to the “Library Profile” section of the EDMS;
- Completion of, with the exception for some planned edits, the “2006 Internet Survey Data” modules;
- Completion of the “Tell the Story” and “Library Value Calculator” modules with the exception of planned edits; and
- Near completion of steps needed to generate modified versions of the “Tell the Story” and “Local Conditions” reports.

With the exception of the addition of the 2005 NCES database to the “Library Profile” section of the EDMS, remaining tasks to complete each area of the EDMS involve edits to modules, minor navigation design changes, metadata edits of the infrastructure, and continued development of instructional module support documents (i.e. sample reports, sample planning forms, etc.).

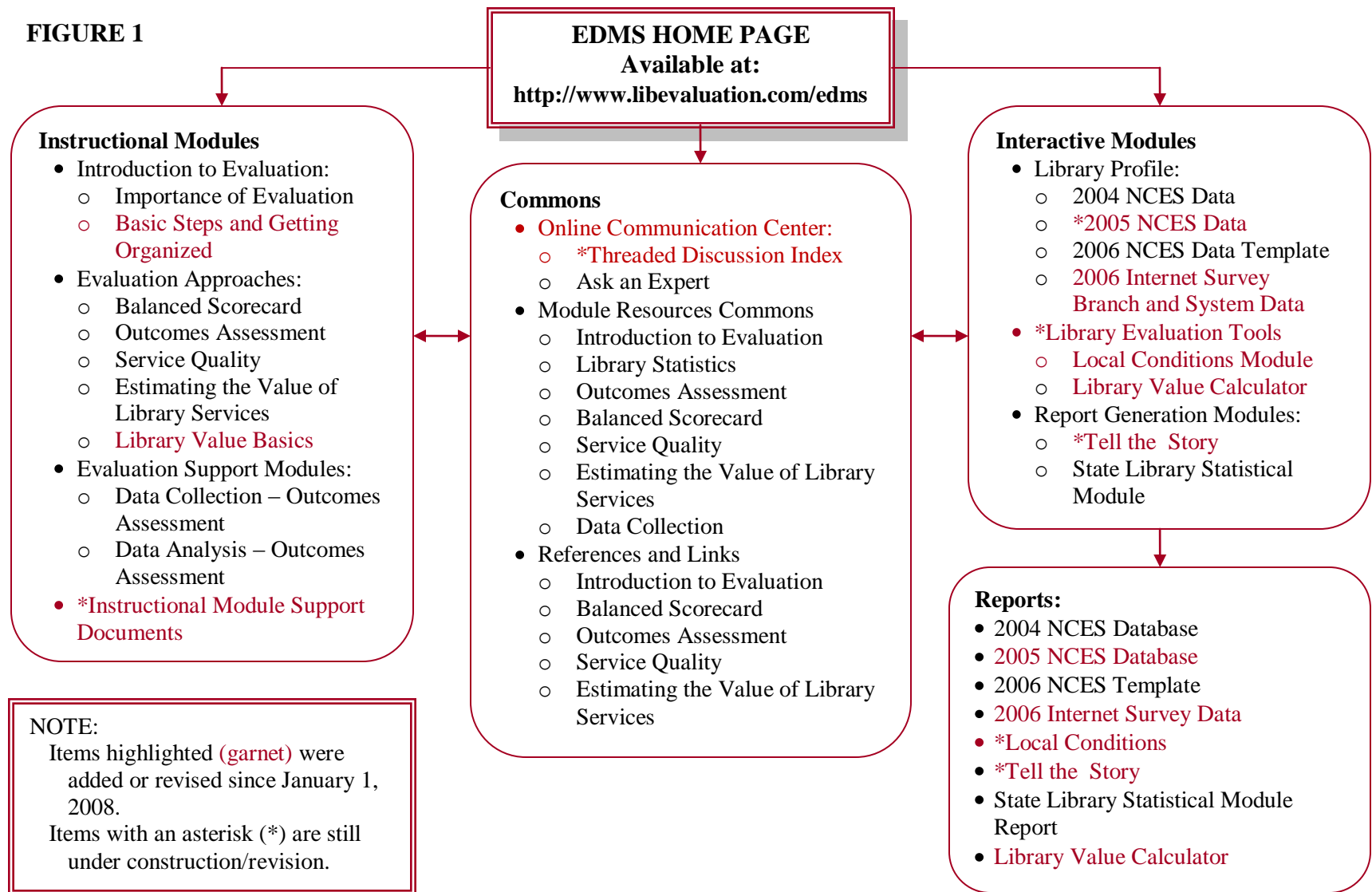
In addition to ongoing development and edits of modules and support documents for the EDMS site (i.e. since December 2007), the project team:

- Met with the project Advisory Committee and Partners (January 2008);
- Conducted ongoing formative usability and functionality testing of the EDMS that included an external assessment from an instructional module consultant/contributor (February and March 2008); and
- Planned next steps based on the meeting, formative assessments, and external assessment (March – April 2008).

Based on the results of the January meeting, the formative assessments, the external assessment, and planning steps needed to complete all remaining tasks of the project, the project team requested and received a one-year grant extension.

Figure 1 (below) presents a current overview of key areas of the EDMS web site. Highlighted items (**garnet**) are new modules/reports added to the EDMS and/or completed since January 1, 2008. Items with an asterisk (*) are still under construction and/or revision.

FIGURE 1



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EDMS DEVELOPMENT

Since December 2007, the project team has continued with the development, implementation, and revision of the EDMS. The project team presented the EDMS at the 2008 ALA mid-winter conference to the project Advisory Committee and partners. The project team also conducted formative evaluations (i.e. ongoing usability and functionality testing) of all aspects of the EDMS. In addition, a consultant hired by the Information Institute to develop two instructional modules conducted an external review of all instructional modules.

The purpose of the presentation/meeting with the project Advisory Committee and partners, formative evaluation of all aspects of the EDMS, and external review of the EDMS instructional modules is to identify issues, obtain recommendations, and to plan for next steps of the project. This section presents an overview of issues and recommendations received from the advisory committee and project partners present at the January presentation. This section also provides an overview of next steps for the completion of the project based on the January meeting, the team's formative assessments, and the consultant's external review.

Advisory Committee and Project Partners: Issues and Recommendations

In January 2008, the EDMS project team met with the EDMS advisory committee and project partners at the ALA mid-winter conference in Philadelphia. The project team provided an update of completed and planned activities for the EDMS site. The project team also led a discussion to identify areas of the EDMS that Advisory Committee and project partners feel need improvement and/or a change of focus. Project partners and members of the Advisory Committee provided feedback on several areas of the EDMS.

The list below presents selected issues and recommendations compiled by area of the EDMS as suggested by the Advisory Committee and project partner members present at the January 2008 presentation. The list below does not include actions conducted or planned by the project team to implement the issues and recommendations. Planned responses to issues and recommendations from the January meeting are included in the "Detailed Next Steps" section of this report (below).

Instructional Module Issues and Recommendations

1. Adjust instructional modules slide show so it appears in the middle of the screen (i.e. perhaps add an anchor/bookmark). At present, each time a user clicks ahead it takes you to the top of the banner, making the user have to not only click ahead but also scroll down each time. The slide number always indicates slide 0 when going back a slide in the presentations. Fix the slide number to match the slide viewed when going back;
2. The data collection and analysis modules are outcomes assessment specific. Modify the outcomes assessment data collection and data analysis modules from outcomes assessment specific modules to more generic data collection and data analysis modules, i.e. where data collection and analysis relates to all instructional modules and not just the outcomes assessment instructional module; and
3. Change the names of the modified modules to Data Analysis and Data Collection.

Interactive Module Issues and Recommendations

1. Explain what an FSCS key is (in Profile Generator and wherever else it appears);
2. Comparing local libraries to state averages and national averages “means nothing”. Need to allow libraries to compare themselves to peer libraries;
3. Library calculator should pop-up in a new window;
4. Library calculator needs a check all box for the variables;
5. For the library calculator, develop a document explaining how the values are calculated and the use of the calculator;
6. Add a disclaimer for the library calculator and explain where the calculator originated (came from);
7. For the Tell the Story module, indicate that participants have to fill out the form;
8. Open Tell the Story form in a new window;
9. Have a link to the ask an expert form in the Tell the Story module;
10. Add number of library users to Tell the Story module; and
11. Post an example of a completed Tell the Story report to help guide users.

Commons Issues and Recommendations

1. Users need to sign in to phpBB to be able to post or reply to posts. If they have already signed into EDMS they should not have to sign in again to the phpBB site;
2. Discussion-list page colors (i.e. phpBB) do not match the rest of the EDMS color scheme. Change the colors of the list if possible;
3. Discussion list members can view the members list. Change the setting so the member list is only viewable by the administrators;
4. The search function does not work in phpBB. Check the settings to turn the search feature on;
5. The link back to EDMS should send you to the Commons and not to the home page;
6. The title for each forum should be larger text for more prominence;
7. Change the Ask an Expert form label to Ask a Library Expert; and
8. Add a threaded discussion list index to the Discussion Board.

Additional issues and Recommendations

1. Develop a FAQ page from questions asked through the site; and
2. Add this resource under Estimating the Value of Library Services - Missingham, R. (2006). Libraries and Economic Value: A Review of recent Studies. *Performance Measures and Metrics*, 6, 142-158.

Detailed Next Steps – Created April 2008

From February – March of 2008, the project team conducted formative assessments (i.e. usability and functionality testing) of all areas of the EDMS. Based on the January meeting, the formative assessments conducted by the project team, and the external review of instructional modules by the consultant, the project team developed a plan (i.e. detailed list of next steps) to guide the completion of EDMS project tasks through the end of the grant period.

The project team created the list (below) in April 2008 to plan the completion of remaining project tasks associated with development, training, and promotion/marketing of the EDMS. Each area of the list below includes a projected completion date.

I. EDMS development (April – September 30, 2008)

1. Create 2005 NCES module as part of the library profile area.
2. Modify Data Collection and Data Analysis modules so they are generic to all instructional modules instead of specifically outcomes assessment-based.
3. Develop Local Conditions module to produce report based on local library situational factors.
4. Complete edits and modifications to modules and the EDMS infrastructure (see Appendices A and B).

II. Instructional module training session preparations (June – October 31, 2008)

1. Create training protocol and develop a general evaluation-planning template that includes steps for planning, implementing, and reporting/advocacy efforts with sample plan(s) and reports.
2. Develop outcomes assessment, service quality, and library value planning templates with completed samples and reports for each.
3. Develop sample data collection and data analysis plan templates with samples of each (i.e., samples for service quality, outcomes assessment, and library value).
4. Link 1-3 together as an instructional module training exercise. Steps to develop include:
 - a. Develop an evaluation plan specific to a library's situational factors (include links from the template here to Library Profile and Local Conditions with steps/tips on how to identify situational factors).
 - b. Select and develop evaluation approach(es) using evaluation templates for inclusion in the overall evaluation plan that includes use of links to references and resources to help develop each approach.
 - c. Develop data collection and analysis plans specific to each approach.
 - d. Prepare a discussion on use of results, i.e. reports, presentations, papers, advocacy efforts, etc.

III. Interactive module training session preparation (June – October 31, 2008)

1. Library Profiles – create training protocols and support documents/examples specific to profile data use, i.e. to identify local library situational factors for evaluation purposes, for comparison to other libraries, etc.
2. Library Evaluation Tools – create training protocol on use of Library Value Calculator and Local Library Conditions with sample reports, applications, etc.
3. Library Report Modules – create training protocol on use of Tell the Story and State Library Statistics Module with sample reports of each.

IV. Communication – use of the commons, contact us templates, etc. (June – October 31, 2008)

Increasing the Effectiveness of Evaluation for Improved Public Library Decision Making and Advocacy

1. Upgrade (if not yet done) and test the phpBB discussion list.
2. Test Contact Us, Ask an Expert, and Suggest A Resource templates.
3. Explore potential benefits of having a blog and/or other social networking features added to the EDMS.

V. Training Sessions (November 1, 2008 – June 15, 2009)

1. Schedule three to five training sessions for late fall 2008 through mid-spring 2009, such as arrange for training space at ASIST and/or New York library association this fall, ALISE and ALA mid-winter in January 2009, ALA summer conference, etc.
2. Develop 3-4 hour presentation protocol for training sessions that include the instructional and interactive training protocols (above) and training protocols for other areas of the EDMS, such as commons area, contact features, about us, communication features of EDMS, etc.

VI. Marketing/Promotional efforts

1. Market and promote the EDMS through IMLS.
2. Write presentation papers, articles, etc. and present the EDMS at conferences, etc.
3. Promote the EDMS through project partner and Advisory Committee libraries.
4. Promote the EDMS through the ALA research division.

VII. Reports to IMLS (July 1, 2008 – October 26, 2009)

1. Interim Report – July 1, 2008
2. Annual Report – December 31, 2008
3. Interim Report – July 1, 2009
4. Final Report – October 26, 2009

SUMMARY

For the past six months of the project (January 1, 2007 – June 2008), the study team continued with development and edits/modifications to EDMS modules and the EDMS infrastructure that include:

- Implementation of two additional instructional modules;
- Initial development of instructional module support documents;
- Re-assessment of social networking features of the EDMS (i.e. Commons areas);
- Re-organization of interactive modules to include a new section of “Library Evaluation Tools” that includes the “Library Value Calculator” and “Local Conditions” modules;
- Preparation to add the 2005 NCES database to the “Library Profile” section of the EDMS;
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- Completion of steps needed to generate modified versions of the “Tell the Story” and “Local Conditions” reports.

With the exception of the addition of the 2005 NCES database to the “Library Profile” section of the EDMS, remaining tasks to complete each area of the EDMS involve edits to modules, minor navigation design changes and metadata edits of the infrastructure, and continued development of instructional module support documents (i.e. sample reports, sample evaluation planning forms, etc.)

In addition to ongoing development and edits of modules and support documents for the EDMS site since December 2007, the project team:

- Met with the project Advisory Committee and Partners (January 2008);
- Conducted ongoing formative usability and functionality testing of the EDMS that included an external assessment from an instructional module consultant/contributor (February and March 2008); and
- Planned next steps based on the meeting, formative assessments, and external assessment (March – April 2008).

Based on the results of the January meeting, the formative assessments, the external assessment, and planning steps needed to complete all remaining tasks of the project, the project team requested and received a one-year grant extension.

As reported in prior interim and annual reports, the development of the interactive components of the EDMS continue to be much more challenging than anticipated – requiring significantly more technical expertise and study team time than originally planned. The study team, however, continues to recognize the importance of access for libraries to data such as that contained in databases such as the NCES and Gates/Information Institute Internet surveys.

Access to data from these and other similar databases, along with information received from instructional modules, good examples of evaluation efforts (i.e. reports, etc.), access to

evaluation references and resources, and access to evaluation planning documents enhance libraries' advocacy, planning, and budgetary efforts. In addition, profiles and reports generated from use of library databases library evaluation tools, such as the library value calculator and local conditions modules will aide local library efforts to determine and promote the value of local library services and resources to the community they serve.

NEXT STEPS

In January 2008, the EDMS project team met with the EDMS advisory committee and project partners at the ALA mid-winter conference in Philadelphia. Project partners and members of the Advisory Committee provided feedback on several areas of the EDMS. A general overview of selected issues and recommendations from the meeting for next steps includes:

- Add more descriptions, directions, and definitions (where applicable) related to general use of instructional and interactive modules;
- Revise and re-focus how the "Tell the Story" module is presented and add information/examples to aide use of the report by EDMS participants; and
- Develop instructional/informational support module(s) for the Library Value module that includes how to calculate values, where the dollar values for the calculator originated and how to modify the values for services, effective dissemination of results, etc.

In addition to the above, meeting participants suggested the addition of a FAQ (frequently asked questions) page that includes questions asked at training sessions (i.e. spring 2008) and questions submitted through EDMS communication forms (i.e. Ask an Expert, Comment, Feedback, and Suggest a Resource).

From February – March of 2008, the project team conducted formative assessments (i.e. usability and functionality testing) of all areas of the EDMS. An overview of the results of the assessment for next steps includes:

- Complete development of all modules and support documents;
- Identify additional text edits/changes needed to all areas of the EDMS, i.e. descriptive and directional text/metadata needed for both instructional and interactive modules;
- Re-design the EDMS tab structure, i.e. add drop-down menus from the tabs that provide internal links and improve navigation through the site;
- Modify use of the library FSCS ID lookup process, i.e. add more informational and directional metadata;
- Create better consistency in how modules appear and function, i.e. open in new windows when selected, etc.; and
- Add support documents for instructional modules, i.e. sample reports, evaluation planning/management documents, evaluation templates/forms, etc.

In addition to the assessment, an evaluation consultant, who also developed two instructional modules, reviewed all of the existing instructional modules for the project. The consultant provided recommendations to improve the presentation and use of the instructional modules.

In April 2008, the project team also developed a planning document that contains steps needed to complete the remaining tasks of the EDMS system, to conduct training sessions on use and value of the EDMS instructional system, and dissemination efforts for marketing/promotion efforts. This planning report includes details of the planning steps (see pages 6-8 above); however, next steps by broader areas from the planning document include:

- Complete overall development of the EDMS instructional system;
- Develop specific instructional and interactive training protocols along with support documents for training purposes;
- Test all areas of the EDMS in preparation for training sessions, dissemination of reports, and marketing/promotional efforts;
- Develop an overall training protocol for a 3-4 hour training session;
- Schedule 3-5 training sessions;
- Disseminate reports and conduct marketing/promotion activities; and
- Produce required IMLS grant reports.

The study team anticipates implementation of the remaining components of the EDMS instructional system by September 30, 2008 and completion of all EDMS activities above by July 1, 2009, with the exception of the final report due October 26, 2009.