

Measuring Success--Assessment

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**Note: the slides appearing
in the version of this
presentation may differ
from the actual slides used
during the Institute**

Basics of Measurement and Evaluation

- Defining measurement and evaluation
- Frameworks for measurement
- Outcomes-based evaluation
- Balance scorecard approach

Why Measure?

- Reference point
 - Where service was in the past
 - Current situation
 - Future trends
- Informs
 - Decision makers
 - Managers
 - Staff
- Sets Priorities

Problem

- Not too little data
- NOT THE RIGHT DATA!
- What are the right KPI's?



“That’s the gist of what I want to say.
Now get me some statistics
to base it on.”

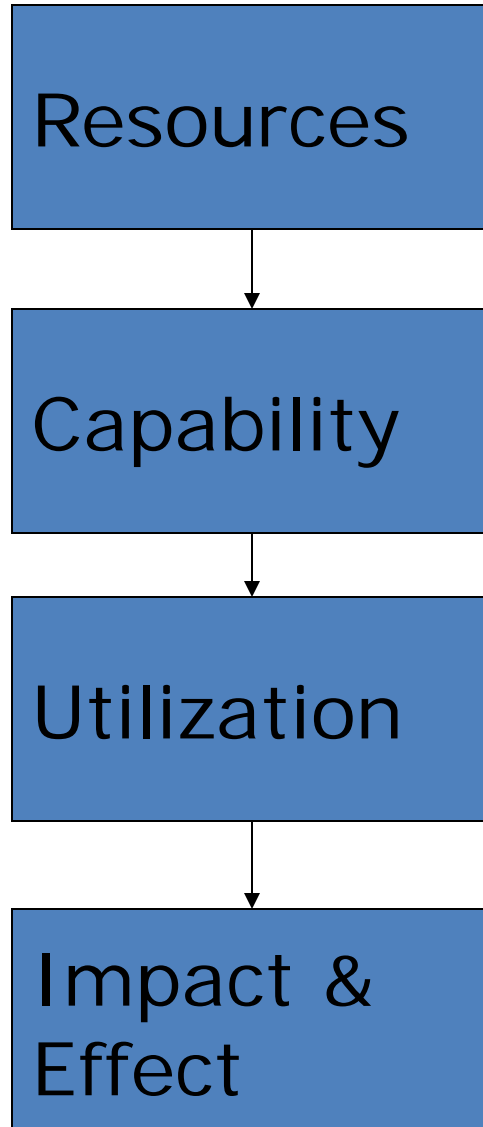
Measurement vs. Assessment

- Measurement is collecting the raw numbers
- Assessment is the determination of the value of the service
- Assessment requires a perspective
- Creating indicators allows for incorporating some context

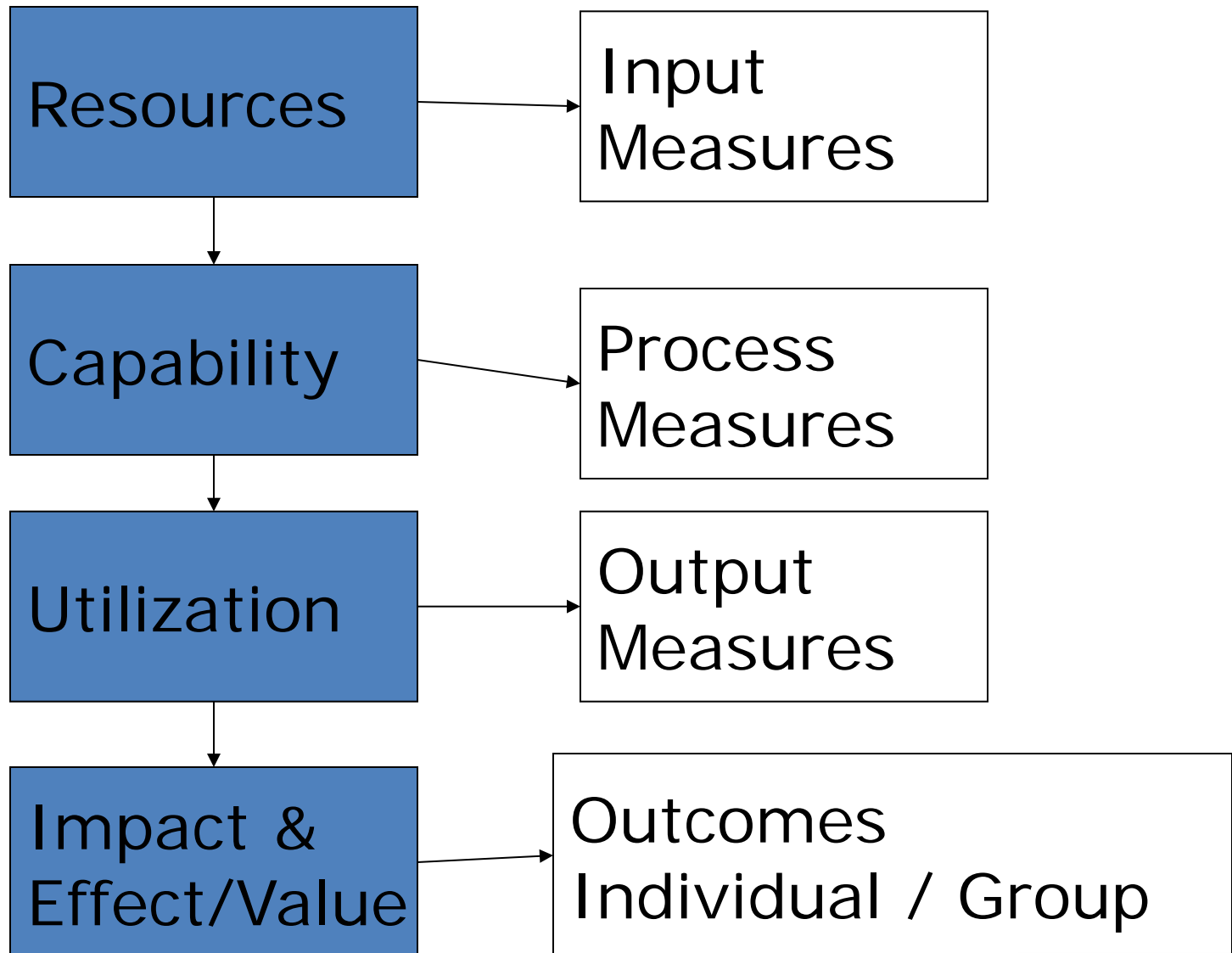


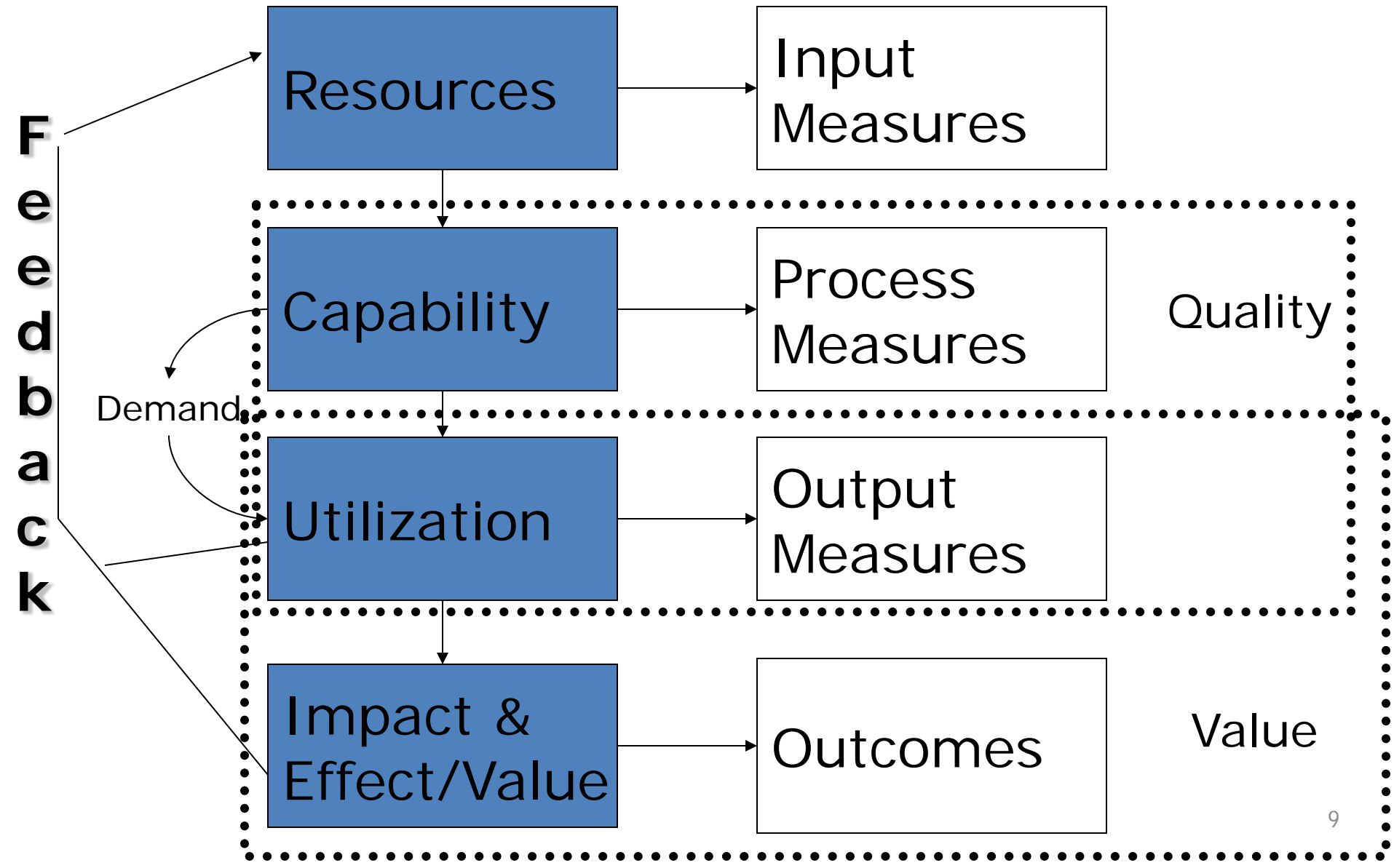
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Measurement Framework



From Joseph Mathews Measuring for Results





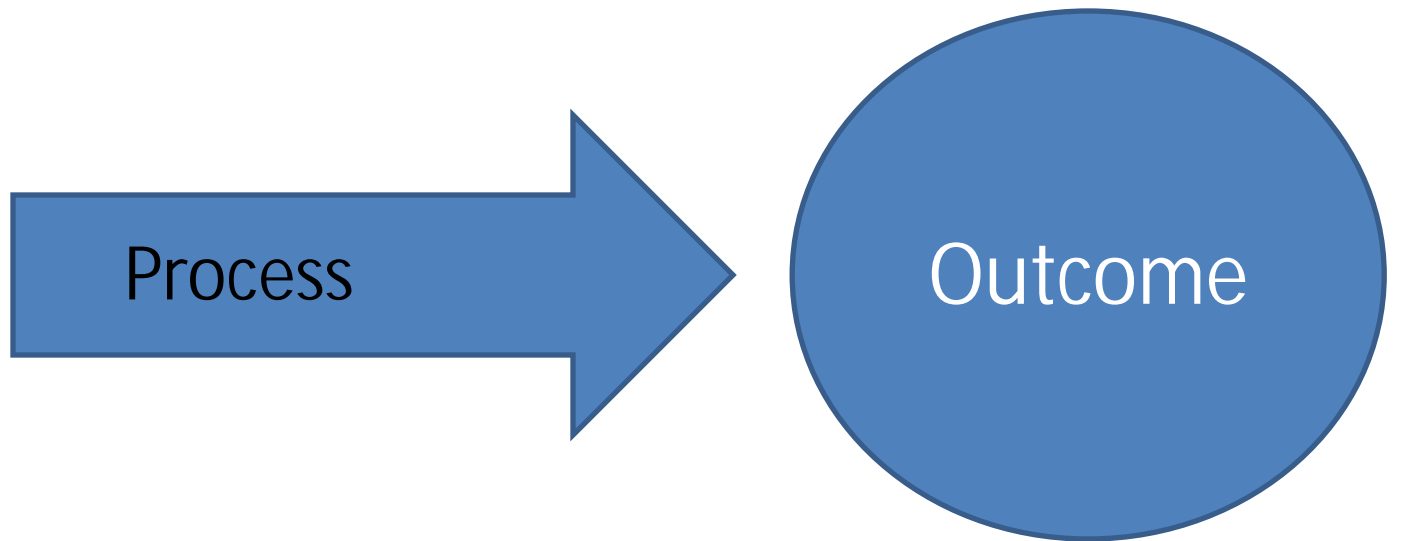
Input Measures

- Measure the capacity/potential
- Easy to collect and report
- Examples:
 - Income/Expenditures
 - Staffing
 - Collection (total, growth, recency)
 - Infrastructure (cost, speed, space, number of workstations, etc.)
 - User base statistics

Process/Efficiency Measures

- Are we doing things correctly?
- Efficiency—how economical is an activity?
Cost per transaction for reference service, document delivery, etc.
- Productivity—focus on time to complete task or activity. Time to catalog an item, time to process a transaction, etc.
- System Reliability—focus on percent of uptime or availability of the system

Outcome Measures



Library Services

- Reference
- Circulation
- Instruction

Satisfaction

Productivity Numbers
Quality

Thinking About Outcomes

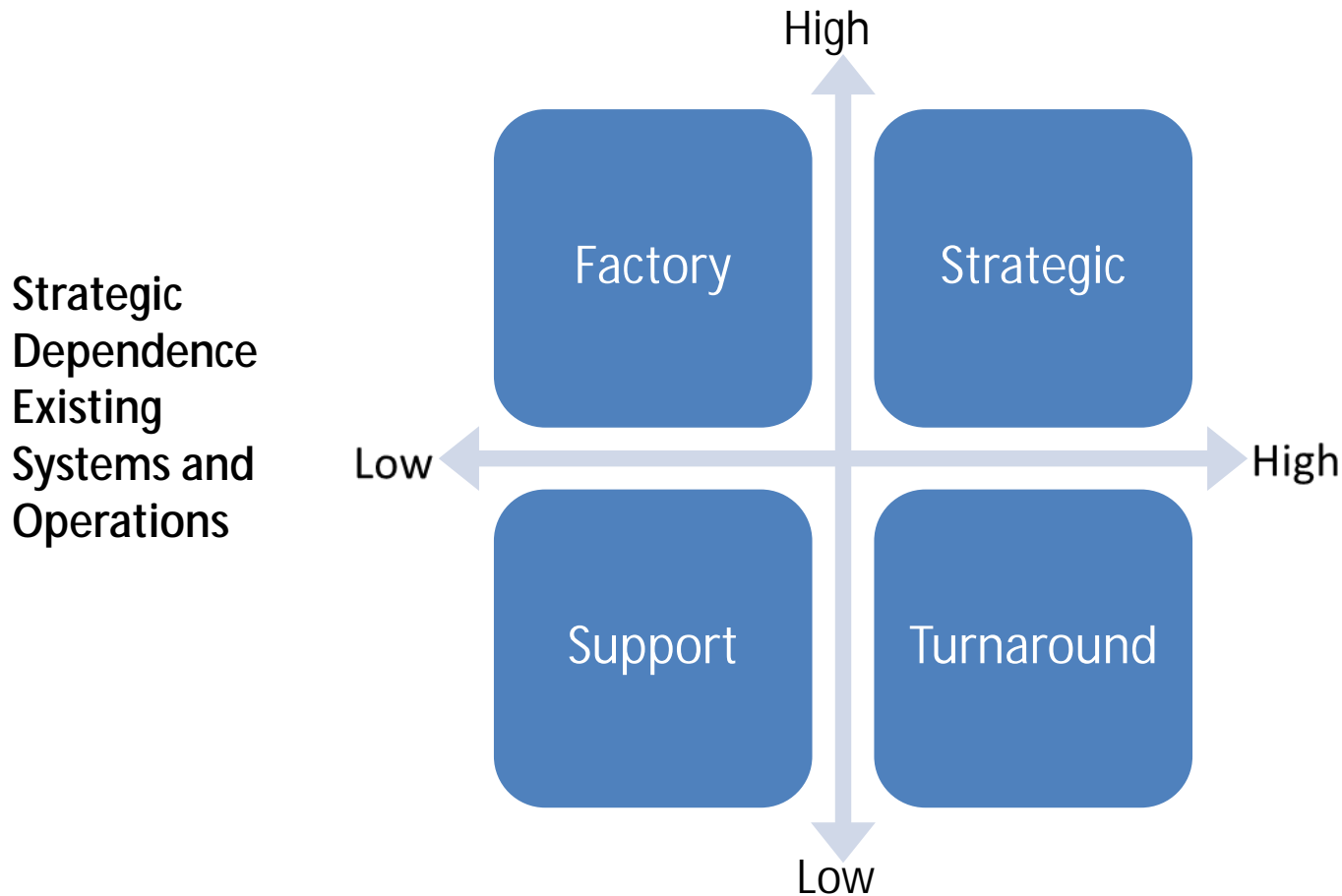
- What is the desired end result of a digital library service?
- What effect does the digital library service have on the user?
- Can it be measured?

Defining Value

Value = quantity of commodity produced x unit price

Library value = perceived value/perceived cost

Value of the Library?



Value Measures

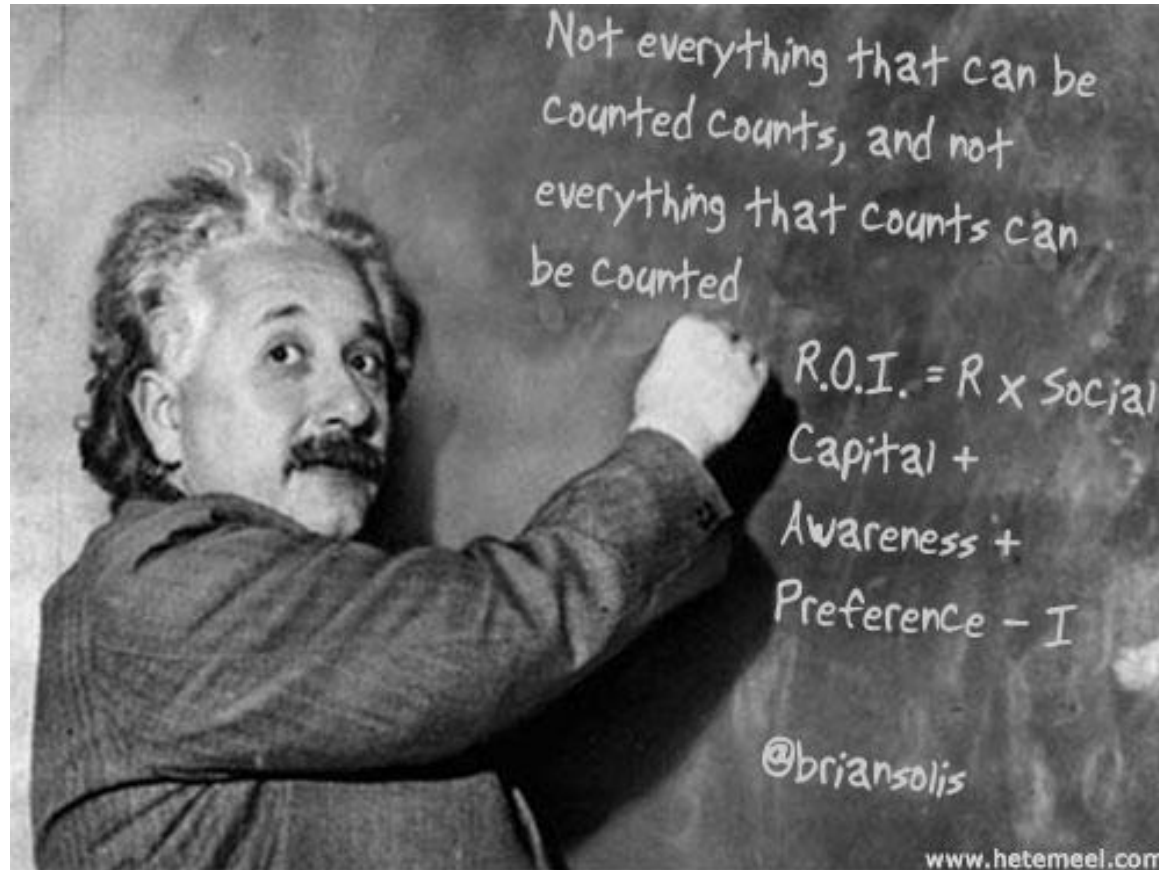
- Direct
 - Cost Savings
 - Price of competitive services
 - Cost/Benefit analysis
 - Rate of return
- Indirect
 - Willingness to Pay
 - Willingness to Accept

Outcome--Organizational Value

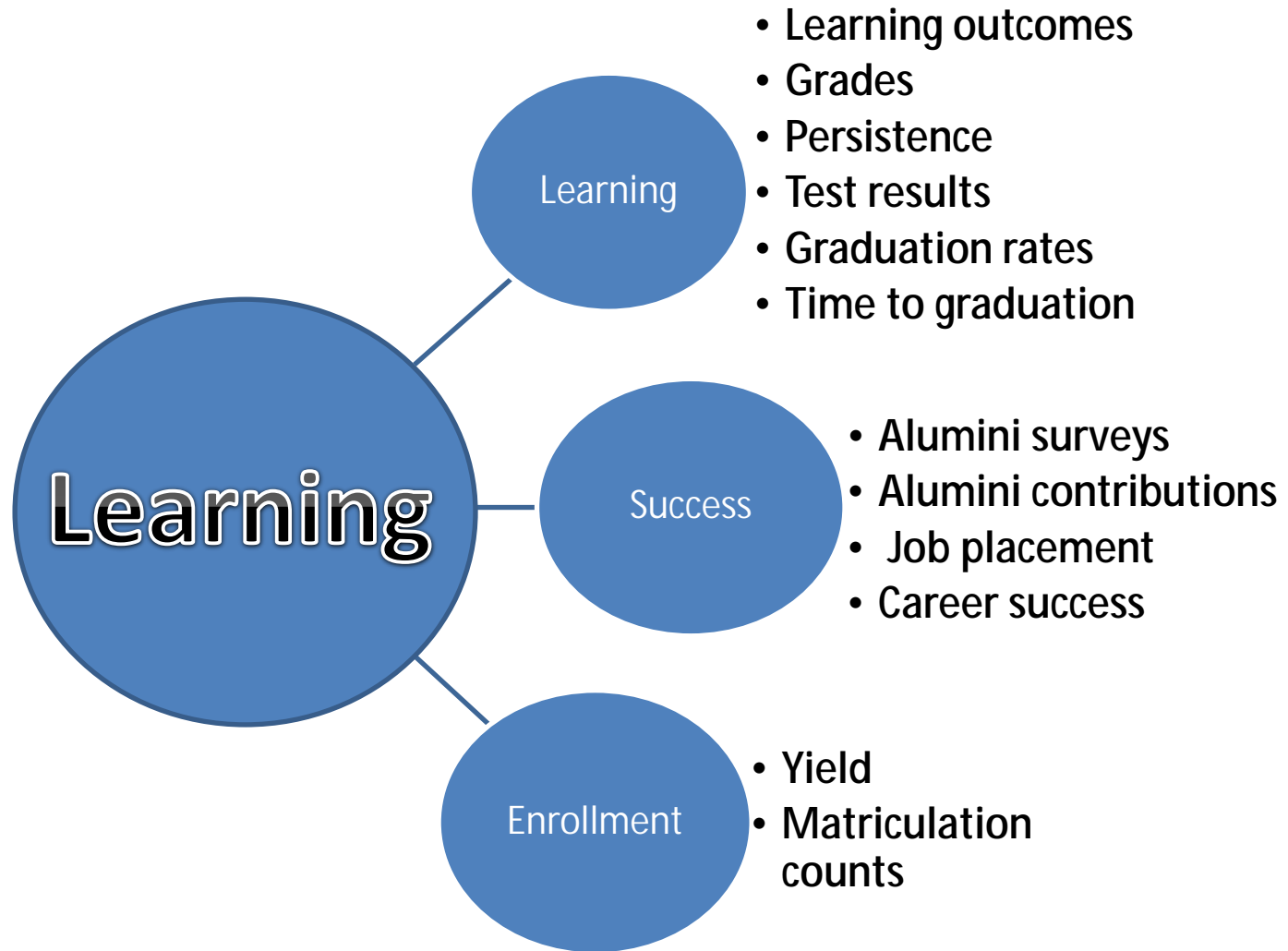
Student	Faculty	University
Enrollment	Research	Reputation & Prestige
Retention/Graduation rates	Grants	Cost Savings
Recruitment	Faculty Recruitment	Fund Raising
Success/Achievement	Teaching effectiveness	Community Engagement
Learning	Productivity	
Experience		

Value and ROI

Not always the Same!



Student Learning



Institutional Quality

Retention Rates

Student
Satisfaction

Graduation
Rates

Class Size

Full Time Faculty

Library Holdings
Technology

Freshman Merit
Scholars

Standardized
Test Scores

Faculty
Publications

Grants

Peer Assessment

Endowments
Financial
Resources

Tools for Assessment Measuring Measures

Benchmarking Measures in a Context

- Measure against what?
- Data benchmarking
- Process benchmarking

Surveys

- Figure out what you would like to be able to say at the end
- Craft questions appropriately
 - Closed versus open questions
 - Analysis of the results a consideration
- Test survey

Developing Appropriate Elicitations

- Developing Surveys
 - Mail – if you have an audience list
 - E-mail – As above (spam)
 - Handouts – if you have a physical presence
 - Web-based – attached to the service
 - Web-based pop-up – Blocker problems
- Combining methods

Sampling

- Identify who or what
- Avoids having to survey or test everyone
- Kinds
 - Random – everyone has an equal chance
 - Purposeful – all decision makers, all people who use the system at a certain time under certain conditions, etc.
 - Convenience—whoever is available

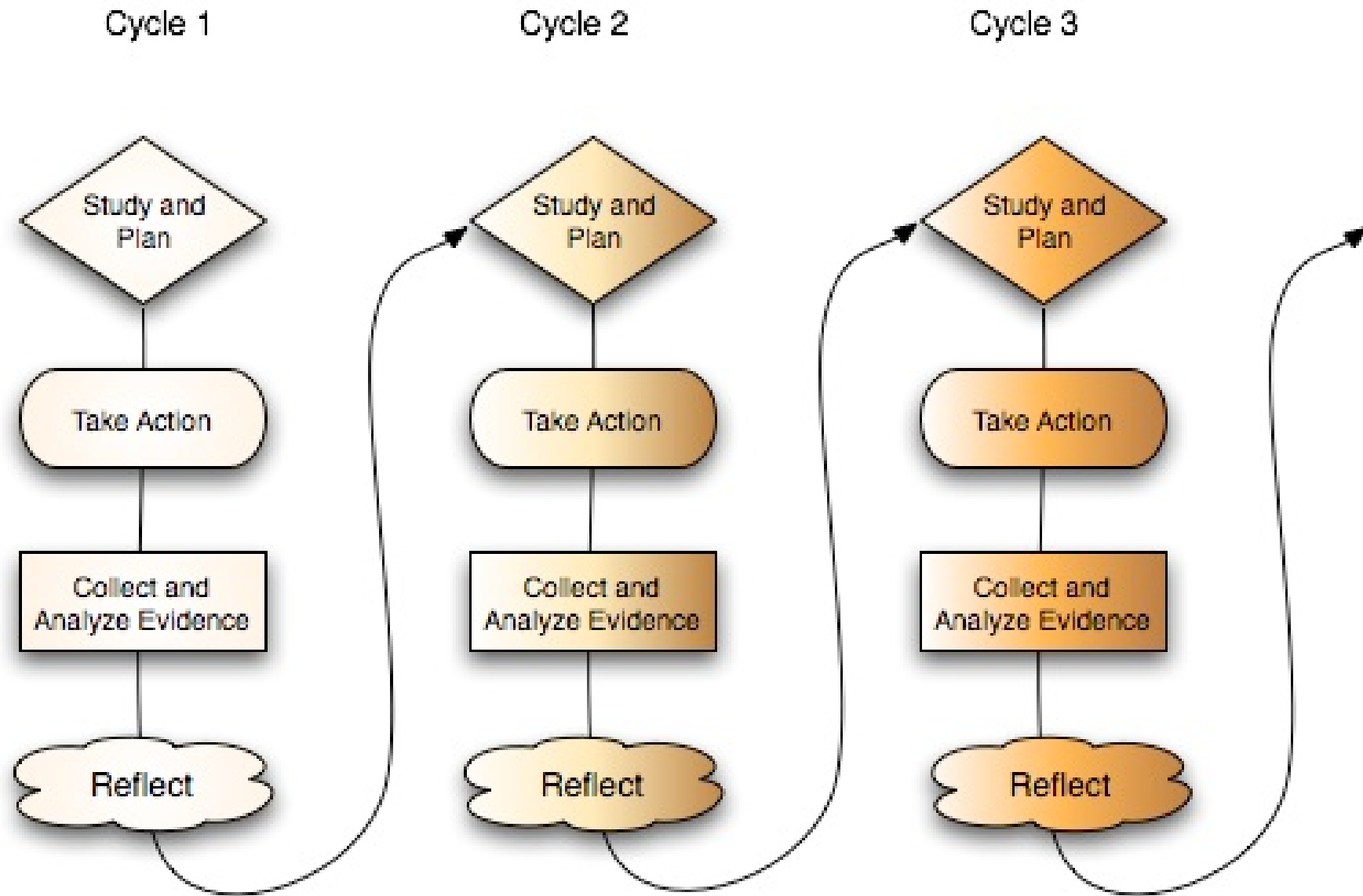
Determining Sample Size

- Depends on how specific you need to be and how accurate
- Depends on resources

Focus Group Studies

- Effective for telling a story or gaining insight
- Often misunderstood—deceptively simple
- Purpose is to promote self-disclosure
- Often used as part of planning exercise, marketing, as a follow-up to survey and sometimes as way to help develop surveys
- Should be done when insight is needed but should not be done in a highly emotionally charged environment

Action Research



Over time, action researchers develop a deep understanding of the ways in which a variety of social and environmental forces interact to create complex patterns. Since these forces are dynamic, action research is a process of living one's theory into practice (McNiff & Whitehead, 2010).

Putting it all together....

Creating effective performance measurements

- Clarity of Purpose
 - Both measured group and the group for whom measures are collected are clearly stated
- Focus and Alignment
 - The measures collected are in line with the mission, goals, vision, and values of the library
- Regular Refinement
 - Measures are reviewed and changed to keep up with changes in environment
- Rigorous indicators
 - Measures are well-defined using unambiguous language and with as little bias as possible

From Matthews, J. (2004) *Measuring for Results: The Dimensions of Public Library Effectiveness*

Keeping Balance in Measures

- Balance the library and performance
- Absolute vs. Relative measures
 - Comparisons add context (not always appropriate, however).
- Objective vs. Subjective
 - How much does background of evaluator affect the interpretation of the results?
- Process vs. Function
 - Focus on processual steps as compared to outcome of process
- Performance vs. Diagnostic
 - Measuring achievements vs. Measuring to find problematic areas

From Matthews, J. (2004) *Measuring for Results:
The Dimensions of Public Library Effectiveness*

More concepts for balance of measures

- Direct vs. Indirect
 - Measuring a specific activity vs. measuring a surrogate for an activity (looking at citations as surrogate for measuring value of materials)
- Lagging vs. Leading
 - Lagging = actual performance, while leading = prediction of something else
- Social vs. Economic
 - Measures indicative of the impact of the DL on a community as compared to the economic importance of the DL

From Matthews, J. (2004) *Measuring for Results: The Dimensions of Public Library Effectiveness*