Performance Measures and Assessment:
Critical Tools During Challenging Times

NISO Forum
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Building Your Own Assessment Plans

Presented by
Larry Nash White, Ph.D.

June 1, 2009 Baltimore, MD
NISO Assessment and Performance Measurement Forum

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

Introduction

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

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

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

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
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

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

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

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)
The best of assessment plans

Components of assessment plans: traditional format

<table>
<thead>
<tr>
<th>Efficiency</th>
<th>Effectiveness</th>
<th>RIO / ROA / Value</th>
<th>Educational Outcomes</th>
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</thead>
<tbody>
<tr>
<td>Goals</td>
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<td>Objectives</td>
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<td>Metrics (indirect)</td>
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<td>Metrics (Direct)</td>
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<td>Data Collection</td>
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<td>Analysis</td>
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<td>Reporting</td>
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</tbody>
</table>

Component uses of assessment plans: traditional format

Proposed components of future assessment plans

<table>
<thead>
<tr>
<th>Stakeholders</th>
<th>Intangibles</th>
<th>Resources</th>
<th>Knowledge / Expertise</th>
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</thead>
<tbody>
<tr>
<td>Strategic Needs</td>
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<tr>
<td>Learning</td>
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<td>Entrepreneur / Innovation</td>
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<td>Accountability / Access</td>
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<td>Alignment</td>
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<td>Demonstration</td>
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<td>Anal./Feed.</td>
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</table>
A question...

- If you were identifying the most important or valuable things in the room, what would you list?
- Well,...
- What if...
One more last thing...

- DO NOT HIRE THE CONSULTANT

  A GOOD WAY TO JUDGE CORPORATE HEALTH IS TO LOOK AT YOUR EMPLOYEE TURNOVER RATE.

- OUR TURNOVER RATE IS VERY LOW. WE ONLY HIRE PEOPLE WHO ARENT SKILLED ENOUGH TO WORK ANYPLACE ELSE.

- MAYBE METRICS AGENT THE WAY TO GO HERE...

  NO METRIC HAS BEATEN ME YET!!!

Questions

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

Contact Information

whitel@ecu.edu  252-328-2315

http://lsit.coe.ecu.edu/white/default.htm