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Assessment in Practice (Presentation)

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Assessment in Practice

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American Library Association
CaMMS Heads of Cataloging Interest Group
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Why do assessment?

- * Improve effectiveness
- * Identify areas for improvement
- * Communicate with customers
- * Communicate with administration
- * Lower costs
- * Help with decision making

Assessment activities

- * Workflow analysis and assessment with an outside facilitator
- * Customer surveys
- * Interviews or focus groups
- * Internal evaluation, assessment, or reviews
- * Benchmarking
- * 360 degree review of committees or other groups

Workflow analysis and assessment

- * Penn State's model is based on Continuous Quality Improvement, using a five-step model:
 - * Where are we now?
 - * Where should we be in the future?
 - * How will we know when we get there?
 - * How far do we have to go?
 - * How do we get there?
- * http://www.psu.edu/president/pia/cqi/planning_model1.pdf

Workflow analysis and assessment

- * CQI Improvement Teams need:
 - * A clear process
 - * Support from a sponsor
 - * An administrative leader for the team
 - * A facilitator
- * We used the Fast Track approach:
- * <http://www.psu.edu/president/pia/innovation/fasttrack.pdf>

Workflow analysis and assessment

- * When useful:
 - * Multiple units
 - * Complex workflow
 - * Workflow has been in place for a long time
 - * Differences of opinion exist about how to address workflow changes

How it works

- * Include all stakeholders in process
- * Make an effort to understand the current process
- * Identify areas for improvement
- * Map new process and report back to sponsors
- * Follow up assessment

FastTrack CQI team 1

- * Video processing for Media Technology Support Services (AV rental/booking/support for classrooms across university)
 - * Cataloging
 - * Acquisitions
 - * Media Technology Support
- * Looked at workflow between the three units
- * Goal to decrease processing time and increase efficiencies

FastTrack CQI team 2

- * Government documents processing
 - * Cataloging
 - * Acquisitions
 - * Serials
 - * Social Sciences Library
- * U.S., PA, UN, Canadian, EU, etc.
- * Catalyst: Reorganization of government documents processing

FastTrack CQI team results

- * Streamlined processes with fewer hand-offs
- * Greater efficiencies
- * Faster turn-around times (Acquisition to Shelf)
- * Better understanding of workflow
- * Improved documentation
- * Greater confidence in established processes

Customer service survey

- * Applicable to operational departments as well as to some committees, working groups, etc.
- * Cataloging and Metadata Services (2011)
 - * Queried subject and campus libraries
 - * Not anonymous
 - * One survey response per library

Survey questions

- * At which branch, subject, or campus library do you work?
- * What services do we provide to your unit?
- * How happy are you with the following aspects of this service:
 - * Speed of services
 - * Quality of services
 - * Speed of response to reported problems
- * If you wish, describe specific service experiences in detail.
- * Do you feel that you know to whom to talk about service issues as they arise? [Y/N]

Survey questions, cont'd

- * How comfortable do you feel with the process of asking for help?
 - * Not comfortable
 - * Somewhat comfortable
 - * Very comfortable
- * Are you able to find information or documentation on the Cataloging and Metadata Services website? [Y/N]
- * Describe your process for asking questions about cataloging services.
- * If you could see one new service provided to your library by Cataloging and Metadata Services, what would it be?
- * Do you have any additional comments?

Interviews or focus groups

- * Can be done as part of a formal review process (e.g., 360 degree review)
- * Informally as part of a periodic “checking in” with customers
- * Example: Biannual meetings with subject library staff
- * Results: better communication with our customers and greater comfort level with asking questions

Sample focus group topics

- * Update on RDA implementation
- * Feedback on current projects
- * New project proposals
- * Assistance with cataloging statistics
- * Issues, problems, or concerns
- * Clarify policies, procedures, and workflow
- * Any other questions

Internal assessment

- * Annual cataloging reviews
- * Each cataloging team conducts own review
- * Develop own process
- * Write report
 - * What was the process?
 - * Training needs identified?
 - * Policy issues identified?
 - * Overall assessment of the process itself?

Benchmarking

Definition:

Benchmarking is the systematic process of comparing business processes and performance metrics to industry best practices in terms of quality, time, and cost dimensions, and making such comparisons the basis to do things better, faster, and cheaper.

<http://www.brighthub.com/office/entrepreneurs/articles/82292.aspx>

Benchmarking

- * Advantages
 - * Improve performance
 - * Generate ideas
 - * Encourage a continuous improvement mindset
- * Disadvantages
 - * Apples to oranges comparisons

360 degree review

- * Usually applied to individuals
- * Invites feedback from peers, subordinates, and supervisors
- * Developmental in nature

360 degree review of a committee

- * Digital Initiatives Steering Committee
 - * Feedback was sought from all stakeholders through interviews
 - * Committee members
 - * Customers (i.e., subject librarians who had proposed projects for digitization)

360 degree review of a committee

- * Questions
 - * What's working?
 - * What's not working?
 - * Suggestions for improvement?
 - * Communication?

360 degree review of a committee

- * Record themes that emerge from interviews
 - * Communication issues
 - * Confusion about roles and responsibilities
 - * Redundant committees and working groups
- * Implement improvements
 - * Collapsing two groups into one with more of an operational focus

Conclusion

- * Workflow analysis and assessment with an outside facilitator
- * Customer surveys
- * Interviews or focus groups
- * Internal evaluation, assessment, or reviews
- * Benchmarking
- * 360 degree review of committees or other groups

Assess the assessment

- * Some assessment efforts may prove to be more effective than others
- * Did the assessment effort give you the information you need to meet your goals?
- * If not, you may choose another approach or refine your current approach
- * Document and share the results (internally, and if possible, externally)

Questions?

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