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Abstract: These checklists developed by the Association of College and Research Libraries to provide guidelines for the organization of a bibliographic instruction program cover the following areas: (1) preliminary planning, including needs assessment and research; (2) developing goals and objectives; (3) gaining and maintaining support from within and outside the library; (4) administering the program, including staffing, budgeting, space requirements, and publicity; (5) instructional methods and materials; (6) instructor training; and (7) evaluating the program. (MES)
ORGANIZING AND MANAGING A LIBRARY INSTRUCTION PROGRAM: CHECKLISTS

Revised Edition
1986

Association of College and Research Libraries
Bibliographic Instruction Section
Continuing Education Committee
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INTRODUCTION

"Organizing and Managing a Library Instruction Program"

These checklists were developed originally by the Bibliographic Instruction Section Continuing Education Committee for a preconference in 1979 when library instruction was still a new concept for many academic libraries. The checklists as a separate publication have been used successfully by many librarians since then. However, library instruction no longer is considered a "new" concept in the field of academic librarianship. Over the last ten years a wealth of information has been added to the literature. When the ACRL Standards and Accreditation Committee forwarded the checklists for review this year, the current Continuing Education Committee decided to revise them to reflect new approaches, practices, and technologies in library user education. As a result, the checklists are now a product of two committees and many experienced instruction librarians.

The checklists are meant to be very practical, thought-provoking tools. They do not attempt to provide full information but, rather, to act as guidelines to the organization of a program. The checklists serve several functions. Some of the lists offer possible alternatives from which to choose, such as those on instructional modes and materials. Others provide points of consideration, such as those on writing goals and objectives. Since each chapter was authored by a different Committee member, writing styles vary somewhat. The chapters have been edited to conform to a standard format and lexicon.

The Committee hopes that these checklists will continue to be helpful to instruction librarians, and that they will be used in continuing education activities.

Karen Williams, Chair 1985-87
ACRL BIS Continuing Education Committee
Editor of Revised Edition
American Library Association
Association of College and Research Libraries
Bibliographic Instruction Section
Continuing Education Committee

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CHAPTER ONE
PRELIMINARY PLANNING

"The ability to find information is probably as important as the information itself."

An analysis of the characteristics of the potential audience for instruction and their instructional needs is an essential part of the preliminary planning process. Listed below are some factors to be considered during this stage of the planning process.

A. NEEDS ASSESSMENT - Quantitative aspects. To assist the planner in determining the size of the potential audience.

1. Primary audience

   ___ # of undergraduate students enrolled at college/university
   ___ # of graduate students enrolled
   ___ total student enrollment
   ___ # of faculty
   ___ # of staff
   ___ others in college/university community
   ___ Total

2. Analysis of primary audience

   ___ freshmen
   ___ sophomores
   ___ juniors
   ___ seniors
   ___ others
   ___ SUBTOTAL
   ___ masters
   ___ doctoral
   ___ other programs
   ___ SUBTOTAL
   ___ TOTAL

   ___ full-time students
   ___ part-time students
   ___ live on campus
   ___ live within 20 minutes of campus
   ___ commute over 20 minutes
   ___ age group 18 - 22
   ___ age group 23 - 29
   ___ age group over 30

   ___ new faculty
   ___ senior faculty
   ___ international students
   ___ physically handicapped students
   ___ other special user groups (specify)
3. Audience grouped by discipline

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<td>TOTAL</td>
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</table>

4. Secondary audience

- extension students
- students from other colleges/universities
- business patrons
- community patrons
- others (specify)
- TOTAL

B. NEEDS ASSESSMENT - Qualitative considerations - library skills level of potential audience. To assist the planner in determining the level and intensity of library instruction efforts.

1. Users' current knowledge of physical arrangement of library

- minimal - never used the library before
- average - knows a little about library arrangement
- above average - fairly independent

2. Users' current knowledge of public service units by functions and materials

- circulation policies
- reference assistance
- serials
- government documents
- interlibrary loan
- media/a.v. materials
- other (specify)

3. Types of instruction students have had within present institution

- library tour
- handouts: floor plans, bibliographies, handbook, etc.
- point-of-use instruction
- workbook
- audiovisual programs
- classroom instruction
- other (specify)
- none
4. Users' attitudes toward library and library staff

- negative - "do it for me"
- intimidated or embarrassed
- indifferent
- open-minded - willing to learn
- enthusiastic

5. Users' expectations of library

- leisure reading
- study hall
- reserve readings
- support for coursework
- assistance in locating information
- research use of materials

C. WHAT OTHERS ARE DOING AND HAVE DONE

1. Literature review

- Bibliographic Instruction Section (BIS) publications
- Assoc. of College & Research Libraries (ACRL) publications
- Library Instruction Roundtable (LIRT) publications
- Library Orientation-Instruction Exchange (LOEX) publications
- RSR Annual Bibliography of Library Instruction
- online databases
- library literature indexes
- current issues of key periodicals
- other (specify)

2. Consult colleagues and other knowledgeable individuals/consultants

3. Attend conferences and workshops: local, regional, and national

4. Use networks and library instruction clearinghouses

Michael Fineman
May 1986
CHAPTER TWO
DEVELOPING GOALS AND OBJECTIVES

It is very important to write formal educational goals and objectives for a bibliographic instruction component. This chapter shows how to write broad goals for initiating or improving a program, and more specific instructional objectives; both of which are necessary for successful program development, administration, and evaluation.

A. GOALS DESCRIBE A DESIRED STATE OF AFFAIRS AND WILL BE USED:

_____ to determine feasibility of a program
_____ to implement a program
_____ to improve or expand an existing program
_____ to seek approval of the program from outside funding agencies, college and library administration, library staff, and faculty
_____ to provide information concerning the effectiveness of instruction and the skills developed by students
_____ to measure attainment of objectives

B. EXAMPLES OF GOALS TO CONSIDER FOR THE BIBLIOGRAPHIC INSTRUCTION COMPONENT INCLUDE:

_____ to design instructional materials
_____ to facilitate learning of library resources and search skills
_____ to maintain liaison with appropriate academic departments
_____ to evoke a positive impression of the library
_____ to ensure that instruction librarians are adequately trained in teaching methodology (instructional techniques)

C. EDUCATIONAL OBJECTIVES ARE SPECIFIC MEASURABLE DESCRIPTIONS OF ACTIVITIES WHICH REFLECT MOVEMENT TOWARD STATED GOALS.

1. These objectives represent knowledge or skills to be mastered. For example:

_____ to enable students to use reference tools to answer immediate information needs
_____ to enable students to acquire expertise in search techniques
_____ to enable students to use bibliographic tools in their area of major interest

2. Well constructed objectives use descriptive terms referring to specific results which are measurable, and behavior which is observable.

_____ to write ...
_____ to identify ...
_____ to solve ...
_____ to differentiate ...
3. Objectives stipulate conditions required to achieve results, using such specifications as:

- given a list of ...
- given any reference of the learner's choice ...
- given a standard set of tools ...
- without the aid of references ...

4. A criterion statement, or standard of performance, indicating a minimum acceptable performance is included for each objective, i.e.:

- a time limit
- minimum number of correct responses, or
- minimum percentage of correct responses, or
- minimum proportion of correct responses
Gaining and maintaining support are absolutely essential to the success of the bibliographic instruction program in the library and across campus. Commitment to the program is first necessary from within the library. Good communication, cooperation, and participation help ensure commitment. Below are some factors to consider when assessing internal and external support.

A. WITHIN THE LIBRARY

1. Commitment among library staff; communication and cooperation

- Has the process of generating the goals and objectives involved representative library staff?
- Have the goals and objectives statements been clearly articulated and publicized?
- Has the library staff been kept informed about activities, plans, achievements by articles in library newsletters and other means of communication?
- Are the views of library staff not directly involved in instruction actively sought?
- Have notes of appreciation and thank-you's from faculty and students been circulated to the heads of units and other members of library administration.
- Do the staff orientation and/or development programs include an explanation of the bibliographic instruction program?

B. OUTSIDE THE LIBRARY

1. Communication and liaison with faculty and campus administrators

- Are attractive brochures and handouts describing the instruction program regularly distributed to departmental faculty and to other campus staff?
- Are other communication channels (newsletters, letters, personal interviews, explanations at departmental meetings) regularly employed?
- Do library staff, as members of pertinent campus committees (such as Undergraduate Curriculum Committee or General Education Committee), actively represent the interests and benefits of bibliographic instruction?
- Are departmental faculty eligible to be members of the bibliographic instruction committees?
Are library instructional publications and research guides routinely distributed to appropriate departmental faculty?

2. Demonstration of the need for bibliographic instruction

Are class assignments, detected at the reference desk, pursued with classroom instructors to determine if library instruction is necessary?

Are practical examples of demonstrated need collected and shared with classroom instructors and administrators?

Is formal documentation of the need for bibliographic instruction, as reported in the professional literature, shared with departmental faculty and administrators?

Has a formal needs assessment and/or library skills proficiency evaluation of students been conducted and the results disseminated to departmental faculty and administrators?

Have departmental faculty been interviewed to determine their understanding of B.I. activities and services; their assessment of student library research skills and needs; or their assessment of curricular offerings which require library research skills

Have departmental syllabi been collected and assessed to learn more about course content and requirements, especially assignments which do or might require library use?

CHAPTER FOUR
ADMINISTRATION OF A PROGRAM

This chapter covers the basic considerations of administration and staffing, budgeting, space requirements and publicity.

A. ADMINISTRATION AND STAFFING

1. The bibliographic instruction program will be administered by:
   - coordinator of instruction hired for that purpose
   - designated public service librarian
   - rotating responsibility
   - committee
   - other (specify)

2. The bibliographic instruction coordinator's title will be:

3. The bibliographic instruction program coordinator reports to the:
   - Head of Reference
   - Director of Public Services
   - Chief Librarian or Library Director
   - Other (specify)

4. Participation of staff members in the instructional program

   Who participates?
   - reference librarians
   - other public service librarians
   - non-public service librarians
   - library support staff
   - graduate library school students
   - other (specify)

   How will they participate?
   - program planning
   - developers/reviewers of mission and goals statements
   - developers of yearly objectives statements
   - instructional designers
   - presenters of library orientation/instruction
   - authors/reviewers of printed, A/V, or computer-assisted instruction materials
   - members of program review/evaluation team
   - monitors and reviewers of instructional sessions

   Is there flexibility and reciprocity in staffing patterns?
   - non-instructional staff serve in instructional service positions/roles
   - instructional staff serve in non-instructional service positions
5. Are there enough instructors participating
   ___ to meet the "start-up" demand
   ___ to meet the potential demand

6. Are participating staff members being given released time from their regularly scheduled duties
   ___ to plan curriculum
   ___ to develop materials
   ___ to teach

7. Other program responsibilities that must be assumed or assigned and carried out include
   ___ maintaining liaison with central library administration
   ___ maintaining liaison with appropriate academic departments
   ___ developing and revising materials
   ___ developing and maintaining a resource center
   ___ training staff members to be effective teachers
   ___ keeping statistics on B.I. program activities
   ___ preparing annual reports
   ___ other (specify)

B. BUDGETING

Budgeting should be done as goals and objectives are written. Budget should be clearly designated for library instruction.

1. Staff: full-time, part-time, released time

   coordinator
   library instructors
   support (non-student) staff
   student assistants

   $_______
   ________
   ________

2. Materials

   supplies: paper, paints, lettering sets
   audiovisual supplies
   audiovisual equipment (includes computers)
   publication costs: photocopy, printing

   $_______
   ________
   ________

3. How much professional and/or staff time is needed to develop

   ___ guides
   ___ handbooks
   ___ self-guided tours
   ___ workbook
   ___ bibliographies
   ___ slide/tape program
   ___ videotape
4. Can the library obtain (purchase, rent, or already own and need to schedule use of) hardware, (projectors, screens, tape recorders, etc) for use with:

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<td>C.A.I. programs</td>
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5. Cost to library for production or purchase:
   (Include both design and reproduction costs)

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To determine cost per user divide total cost by projected number of users.

7. Cost per year to update materials

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<td>C.A.I. program</td>
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C. SPACE

1. Meeting room will be

- classroom where class is normally taught
- classroom within library
- group gathering space within library
- consulting space within library
- other
2. Private consultation for instructors and students will be done

___ in library instructor's office
___ in library classroom when available
___ other

D. PUBLICITY

1. To the library staff will done through

___ announcements and discussions in meetings
___ newsletters, brochures, fliers, posters, etc.
___ one-to-one discussion
___ other

2. Will go to the following departmental faculty

___ those who teach courses involved with library instruction
___ those who teach any subject
___ those in attendance at faculty meetings
___ those attending annual colloquia for classroom faculty on library user education

3. To the departmental faculty in the following manner

___ through personal letters
___ by telephone contact
___ one-to-one when faculty member is in library
___ faculty office visits or departmental visits by librarians

4. To the students in the following manner

___ signs/posters in library
___ hand-outs (in library or other campus buildings)
___ through student newspaper
___ one-to-one discussions in or outside library
___ other (specify)

Cindy Schatz
May 1986
CHAPTER FIVE
INSTRUCTIONAL METHODS AND MATERIALS

Below is a list of some of the most commonly stated purposes (objectives) of library instruction. Following are descriptive lists of commonly used methods and materials. The purposes for instruction should be clearly identified first, then methods and materials chosen according to which will best accomplish the stated purposes.

A. PURPOSES FOR INSTRUCTION

- to enable the students to use tools to answer immediate information needs
- to provide exposure to many reference materials
- to acquire expertise in search techniques
- to use major bibliographic tools in student's academic subject area
- to become familiar with a core of general reference tools
- to provide guidance in the development of a search strategy
- to acquaint students with basic search techniques
- to meet the specific needs of a particular course
- to teach the use of a computerized bibliographic database, e.g., online catalog, Dialog searching
- to instruct students in writing term papers
- to enable student to use major interdisciplinary bibliographic tools
- to enable students to use a particular tool without the aid of a librarian
- to enable students to learn how to use a reference tool at the time they actually need to use the tool
- to expose students to the library
- to evoke a positive impression of the library
- to teach location of departments/materials
- to familiarize faculty with library services and collections
- other

B. FACTORS TO CONSIDER IN SELECTING A METHOD OF INSTRUCTION

- audience (freshmen, graduate students, faculty, etc.)
- number of students to be reached
- depth of instruction required by student to meet information need
- amount of allotted time student has for participation
- manageable student/instructor ratio
- availability of instruction classroom space
- preparation time required of instructor
- immediacy of student information need
- extent to which instruction must relate to classroom course work
- effectiveness of mode in terms of retention of material
- adaptability to evaluation techniques
- effectiveness of instruction mode
- learning style of student
- other
C. METHODS OF INSTRUCTION

These represent broad, general descriptions, each of which could be further refined.

**Individual consultation:** one-to-one instruction in the use of information resources initiated by an inquiry at the reference desk or as part of a formal consultation program. Teaching methods include explanation and demonstration of materials and use one library instructor for one student.

**Workbooks:** In-depth self-paced instruction in the use of information resources. This method uses guided or programmed self-study. The actual text and assignments can be printed, or, computer-assisted-instruction (CAI) can be used.

**Lecture:** One hour (or one class period) of instruction on library research (generally course related). The lecture can stand alone, or be combined with a tour or hands-on experience.

**Workshops:** Introduction to basic sources of information in a given subject area or format, e.g. documents, software, microforms, computer searching. Usually considered more in-depth than a lecture and can last longer than the traditional one hour.

**Course:** In-depth instruction in the use of information resources relevant to either a general interdisciplinary survey or a particular area. Longer and more in-depth than a workshop, often offered for credit. Methods used include lecture, assignments necessitating the library use by students, a/v programs, CAI, demonstrations.

**Point-of-use:** Instructional materials made available at the spot where a particular tool will be used. The instructions can be in written, a/v, kit, or CAI formats.

**Tour:** General introduction to building, library, personnel, services. Walking tours can be done by an instructor or an audiotape, or students can be shown films or use CAI programs.

D. FACTORS TO CONSIDER WHEN SELECTING INSTRUCTIONAL MATERIALS

- number of students to be reached
- need to supplement instruction already being given
- need to provide students with an end product from a library instruction session (i.e. bibliographies)
- need to provide instruction to those who cannot be reached in a traditional manner
- size of instructional staff
- preparation time necessary
- availability of equipment
- effectiveness of the material
- ability to meet the perceived needs of the present or anticipated instructional program
- amount of money available for instructional materials
ease of maintainance/update
facilities available for using equipment
classroom space available
cost to student (if applicable)
other

E. INSTRUCTIONAL MATERIALS

library guides
search strategy guides
bibliographies
search problems
course syllabus
textbook
workbook or programmed instruction
pre-test/post-test
bibliographic tools
A/V materials
syllabus with assignment
computer terminal, modem, software
audiovisual equipment
handbook
floor plan
self-guided tour with written instructions or using cassette tape
other

F. QUALITY OF INSTRUCTIONAL MATERIALS

are they accurate?
of good quality (color, sound, etc.)
attractive
well written with clear directions
flow logically from one point to another
easy to use (if equipment is involved)
readable
durable
current

Carolyn Fields
May 1986
CHAPTER SIX
TEACHING INSTRUCTORS TO TEACH

This section provides guidelines for the training aspect of the bibliographic instruction program. Presently, professional library education usually includes at least an introduction to these services. Since many librarians have not had the opportunity for formal coursework and supervised practice in instruction, this section assumes even greater value for the overall planning of the local library instruction program.

Training programs may include components on learning theories and current theories of information organization, as well as general innovations in education. These programs help library staff to increase their knowledge of teaching methods, to develop the ability to calculate the parameters and complexity of material to be covered with a particular group of students, and to refine presentation skills. Training programs can also be used to establish both standards for teaching among instructors and guidelines for evaluation.

A. PREREQUISITES FOR THE PROGRAM

1. Library staff members interested and willing to take part.

2. At least one librarian to coordinate the program, recruit personnel, motivate participation, and possibly do the training. This person should be attached to, or in close contact with, the Reference Department to maintain daily contact with instructional needs.

3. An administration willing to sustain the program with
   a. funding to
       __ hire additional library staff for instruction
       __ commit released time to participating library staff for marketing, preparation and teaching
   b. Moral support by encouraging department heads, for example, to recognize it as an important activity of academic unit

4. Department heads throughout the system willing to
   a. release library staff to enable them to take part in the program
   b. allow time, after library staff have completed the program, to enable them to prepare and teach classes
   c. provide recognition of services performed by teaching library staff
B. LIBRARY STAFF WILL BE TRAINED BY

- the person selected as coordinator
- qualified personnel from other academic departments, such as Education faculty or Communication Arts faculty
- a professional consultant hired to do the training
- a combination of any or all of the above

C. CONTENT OF TRAINING PROGRAM

- learning theory
- presentation skills
- teaching techniques
- use of instructional technologies
- classroom management
- motivation
- lesson plans
- other

D. PHYSICAL FACILITIES FOR TRAINING LIBRARY STAFF

a. Space for meeting
   - classroom
   - conference room
   - other suitable space

b. Equipment
   - chalkboard, chalk and erasers
   - flip chart, masking tape, wall space
   - video camera and playback equipment
   - slide projector
   - tape recorder
   - overhead projector
   - microcomputers
   - 16 mm film projector

c. Other teaching aids
   - prepared posters
   - slides, audio and video tapes, transparencies
   - slide/tape shows
   - sample materials, such as catalog cards, indexes
   - handouts
   - C.A.I. or C.B.E. software programs

E. OTHER THINGS TO CONSIDER

- commitment of library supervisory personnel
- time commitment of participants
- recruitment and selection of participants
- motivation of participants
future involvement by trainees in the bibliographic instruction program

cost of training program

ongoing training to keep participants updated in their presentations

availability of consultant services within the college or university
to design instructional aids, including computer programs

vehicles for sharing experiences by participants

continuous evaluation of participants' teaching methods and manner
of presentation

feedback presented in manner most appropriate to individual and
group improvement

elements of other sections of this checklist as relevant to time and
place of bibliographic instruction program application

Nancy Coxe
May 1986
CHAPTER SEVEN
EVALUATING A LIBRARY INSTRUCTION PROGRAM

The purpose of this checklist is to outline the major elements which must be considered when planning the evaluation of a bibliographic instruction unit or program. It is not necessary to be an expert to succeed at evaluation. Advanced planning will ensure success.

A. PRINCIPAL AUDIENCE FOR EVALUATION (Who sees the evaluation)

___ library administrators
___ B.I. librarians
___ other librarians
___ university administrators
___ students
___ outside funding agency
___ departmental faculty

B. WHY IS THE EVALUATION BEING UNDERTAKEN

___ to determine whether goals and objectives are being achieved or need to be reassessed
___ to improve the quality of the program
___ to justify the purpose of the program
___ to determine the need for expanding a program

C. WHAT IS BEING EVALUATED

___ program content
___ products of library use (bibliographies, term paper grades)
___ process (have students utilized the most efficient techniques for finding information)
___ instructors (delivery, time management, effective explanations, interaction with students, attitude, etc.)
___ student attitudes toward the library
___ efficiency/cost effectiveness of program
___ program as a whole
___ program quality

D. RELATING EVALUATION TO GOALS AND OBJECTIVES

___ A. State the General Instructional Objectives. Prepare a list of relevant learning objectives and review the list for 1) completeness 2) appropriateness 3) soundness 4) feasibility

___ B. State Specific Learning Outcomes. List the specific types of performance students should be able to demonstrate when they have achieved the objective.

___ C. Relate Evaluation Procedures to Objectives. Try to obtain a good match between student performance as measured by the evaluation instrument and specific learning outcomes.
E. TYPES OF EVALUATION

A. **Formative** (directed toward improving learning and instruction; typically used during planning stages or instructional process).

B. **Summative** (comes at the end of course or unit of instruction; designed to determine extent to which learning objectives have been achieved)

F. **EVALUATION DESIGN:** A design is essentially a plan for conducting the evaluation. A design will ensure a well organized evaluation study and provide a way of gathering comparative information. Elements of design which the evaluator must consider are:

- groups; who will be measured, tested, observed
- times; when (before, during or after the program) will the measurements be made

G. **WHAT INSTRUMENTS WILL BE USED TO COLLECT INFORMATION**

- paper and pencil tests
  - a. standardized
  - b. teacher made
- assignments
- questionnaires/surveys
- personal interviews with students or instructors
- observation of students as they use the library
- follow-up studies

H. **CHARACTERISTICS OF INSTRUMENT** - Regardless of type of instrument or how results are to be used, all measurements should possess

- **Validity** (refers to the appropriateness of the interpretation of the results of a test or evaluation instrument)
- **Reliability** (refers to consistency of measurement, how consistent are test scores and other evaluation results from one measurement to another)
- **Usability** (refers to practical considerations such as ease of administration, time required for administration, ease of scoring, ease of interpretation, cost, etc.)

I. **DATA MANAGEMENT AND STATISTICAL ANALYSIS**

- compile and collate information
- choose appropriate statistical procedures and analyses
- perform analyses
- record and tabulate results
- interpret findings

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J. RESOURCES FOR SUMMARIZING AND INTERPRETING DATA

- helpful campus experts
- computers and statistical packages
- well-written texts

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