

**ACRL IS Management and Leadership Committee
Final Report for ALA Annual Conference, 2014
Barb Mann, Chair
June 9, 2014**

Committee membership

Dawn Amsberry, Cathy Cranston, Fannie Cox, Laura Gariepy, Barb Mann (chair), Lisa Martin, Matthew Mullin (secretary), Sarah Naumann, Jessica O'Brien, Laura Saunders, Meghan Sitar (liaison)

Committee charge

To promote effective leadership and management of academic library instruction programs. The committee promotes Section documents "Analysis of Instructional Environments" and "Standards for Proficiencies for Instruction Librarians and Coordinators," gathers information on the uses and impact of these documents, and solicits feedback for future revisions.

Projects and Status

Revise the *Analysis of Instructional Environments* workbook in regard to creating an executive summary to replace the introduction in order to provide a more streamlined entry point for use and help busy coordinators and managers understand the document's purpose better. The full text of the Workbook can be found at:

<http://www.ala.org/acrl/aboutacrl/directoryofleadership/sections/is/iswebsite/projpubs/aie>

The working group consisting of Dawn Amsberry (lead) and Matthew Mullins condensed the current introduction, and added brief summaries of each of the seven sections of the Workbook.

The summary:

“Analyzing Your Instruction Environment: A Workbook” is intended to guide library instruction coordinators and managers in performing an environmental analysis. The workbook provides instructions and worksheets for conducting an environmental scan. The document consists of seven sections intended to be used in their entirety; however, each section can also serve as a stand-alone document to assist in focusing on that particular aspect of the instructional program. Additionally, the workbook suggests local resources to consult and questions to ask, and includes information on nationally-established guidelines and sources for additional reading.

The primary objective of instructional environment analysis is to provide systematic and comprehensive information for use in decision-making. Environmental scans alert decision makers to trends and issues that may affect the organization, assist educational institutions in understanding the changing needs of learners, and help shape how institutions market programs and services to meet those needs.

Section I, Programmatic Approaches to Analyzing Instruction Programs, prompts the user to supply information on broad institutional issues, such as the institution's mission

statement, goals and objectives, and strategic planning. Section I also includes questions on institutional support for information literacy, teaching facilities, information literacy in the curriculum, collaboration with faculty, pedagogical approaches to information literacy, staffing levels, outreach, and assessment. Information gathered in this section can be used to benchmark instructional programs against those at peer institutions.

Section II, Learner Characteristics, helps the user determine the unique characteristics of learners and the learning environment to ensure a match between the needs of the students and the information literacy offerings provided. The worksheet prompts the user to supply information on the number and percentages of students in particular demographic categories such as age, gender, and ethnic/cultural background. Also included in this section are categories for personal/social characteristics, such as employment and vocational aspirations.

Section III, Current Library Instruction, addresses the current instruction program and includes a list of statistics that should be gathered to track current practices. This section also provides guidance on mapping the institution's information literacy curriculum by listing courses offered and tracking which courses have a research component and noting the content and duration of the information literacy instruction. This process allows librarians to identify where students are receiving information literacy instruction, the content that is covered, and where gaps exist.

Section IV, Information Literacy Across the Curriculum, recommends searching the course catalog for classes with a major research component and then gathering additional information regarding classes, departments, or colleges not served. Using the worksheet users list department, course number, and extent of the current information literacy component.

Section V, Resources for Library Instruction and Information Literacy, solicits information about the programs and assets available to support instructional activities. This section helps users characterize the library's personnel and facilities, and includes sections for recording the available number and type of staff members and librarians, teaching facilities, technological assets, tech support personnel, and professional development opportunities.

Section VI, Modes and Methods of Instruction, helps the user match learners' instructional needs to appropriate methods of instruction. This section allows users to document the target audience and participation or utilization data for various in person, distance, and web-based instruction methods. Users can also note which of these methods include active learning and assessment components.

Section VII, Beyond the Library, encourages decision makers to consider factors across campus, as well as broader, macro-level social and economic trends. This section provides worksheets for recording the library's involvement with external campus entities and activities. Also included are readings and suggestions to help account for aspects of the macro environment, such as technological and legislative developments.

Re-examine the proficiencies listed in the *Standards for Proficiencies for Instruction Librarians and Coordinators* re-ordering and/or collapsing as needed as well as updating the bibliography.

This project group, consisting of Laura Garipey & Lisa Martin, was charged with conducting follow-up interviews with respondents to a 2012 survey on the *Standards for Proficiencies for Instruction Librarians and Coordinators: A Practical Guide*. The goals of the interviews were to identify actual and possible uses of the *Standards*, and most of all, to understand how we might better market them since that responsibility is in the purview of the IS Management and Leadership Committee. Fourteen respondents of the original survey indicated in 2012 that they would be willing to further discuss *the Standards*. Of those 14, four respondents agreed to be interviewed.

The group arranged for telephone interviews with respondents where possible (and e-mail where necessary) and spoke with all four. Once responses were compiled, we identified common themes and areas for future growth. It is important to note that the *Standards* are currently under revision and our group gathered responses without having seen the revisions (which were submitted to ALA executive groups at Midwinter 2014).

Common uses of the *Standards* currently include:

- Training LIS students and new librarians.
- Performance evaluation, especially in the instruction portion of annual reviews and for promotion and tenure requirements.
- Facilitating professional reflection and development both individually and at a group level, particularly in identifying areas where skill growth is needed.
- Facilitating communication with faculty across campus regarding librarians' roles as teachers.

Suggestions for potential future uses of the *Standards* include:

- Using the *Standards* as the basis for a local or national teaching award.
- Creating a scaled questionnaire based on the *Standards* which librarians can use as an assessment or self-assessment.
- Increasing the role of the *Standards* as a formal part of instruction courses in library schools.
- Creating an instruction tutorial series with videotaped instruction sessions by well-known instruction librarians and including the *Standards* in the series.

Suggestions for improvement of the *Standards* (some of which may already be in process, as revisions are being reviewed) include:

- Adding suggested readings for each of the proficiencies in order to improve understanding and use of the *Standards*.
- Addressing technology as appropriate, which is not addressed in the current *Standards*.
- Revising to move away from the 'list approach' to something more holistic (much like the undergoing revisions to the *Information Literacy Competency Standards*).

The information above, combined with specific recommendations from interviewees, informed the approach for how the *Standards* might be better promoted. Accordingly, to the group's recommendations for future growth and marketing of the *Standards* are:

1. Create a plan for regular and ongoing marketing of the *Standards* to begin once the revisions are complete/approved. In order to do so, the committee should market the standards on the ACRL website, to ILI-L and various lists, through library instruction bloggers (such as Meredith Farkas, Karen Schneider, and Lauren Pressley), through hosted sessions at various library conferences and institutes (especially those focusing on information literacy), and by showcasing various libraries' uses of the *Standards*.
2. Work closely with LIS educators through ALISE, through relevant conferences and influencers such as Megan Oakleaf, through ACRL Immersion, and through other venues in order to make LIS instructors aware of the *Standards* and to increase usage in courses. This will increase the number of early career librarians who are exposed to the *Standards* from library school onward.
3. Explore innovative ways to expand and build upon the *Standards* such as pairing them with suggested readings or putting them into assessment form or pairing them with instruction tutorials and videos. This exploration, if it leads to new areas, will increase awareness, increase usage, and promote interest in the topic overall.

The biggest challenge that the *Standards* face, besides revision to keep them relevant and up-to-date, is librarians' lack of awareness. We submit these recommendations with the hope that implementation of one or all of them will increase awareness of the *Standards* in all librarians who have instruction duties.

Full listing of themes, by area:

General note: The Standards are under revision. The revision committee submitted their proposed changes to ALA executive groups at ALA Midwinter in January 2014.

Current uses of the standards (* responses came up repeatedly):

- Developing librarian evaluations to be completed by students following classes.
- Creating librarian peer teaching observations
- *Training new instruction librarians, interns, and students who assist in the classroom.
- *Facilitating reflection and skills/needs assessments for teaching librarians to consider areas in which librarians feel best equipped and most poorly equipped, which can then guide decisions for professional development. This is happening locally at some libraries; could be transformed to a more 'official' reflective tool or skills assessment. Provides a good opportunity for both new and experienced librarians.
- *Developing position descriptions, hiring, annual performance reviews, and standards for promotion and tenure.
- *Influencing some LIS graduate curricula, both in the classroom setting and when librarians are mentoring graduate assistants who are interested in instruction.

- *Generating discussion in professional development settings.
- Creating campus specific standards
- Reviewing curricula on a programmatic level
- Facilitating conversations with faculty and groups like Centers for Teaching Excellence regarding librarians' roles as teachers.

How the Standards could be used (* responses came up repeatedly):

- As a basis for a teaching award in a library.
- Increased use in LIS instruction classes (and increased presence of library instruction classes, though that problem is beyond the scope of this committee)
- *As a Likert scale evaluation of librarians' skills and needs -- something more formalized than just institutional uses
- In conjunction with an instructional video from a well-qualified instruction librarian

How the Standards could be improved (* responses came up repeatedly):

- *Provide recommended reading for each proficiency (2-3 readings for each proficiency). Likely to make the document more helpful and widely consulted.
- Make them a bit less rigid and "stuffy."
- Perhaps move away from the 'laundry list' format and more towards a holistic approach, much like the revisions the Information Literacy Standards are currently undergoing.

Concerns with the Standards:

- Technology isn't mentioned in the current version of the Standards (but they are being revised)
- These Standards are tied in with the better known Information Literacy Competency Standards for Higher Education, which are currently undergoing significant revision, so things will change. The Standards are more appropriate at the programmatic level than the individual one due to their complexity (in number and inflexibility) thus making it unlikely an individual librarian will measure up to all of the listed Standards
- The use of the Standards in any kind of official evaluation or for P&T could be perceived as punitive

Marketing the Standards:

- ACRL website
- Listservs (ili-l; ALISE)
- Conferences: LOEX, WILU, ALA, ACRL. Host sessions focused on uses of the Standards. Particularly for new librarians.
- Reach out to library instruction bloggers (Meredith Farkas, Karen Schneider, Lauren Pressley)
- Offer series of case studies on how the standards are or might be used.

- ‘Keep the conversation going’ with periodic posts connecting a specific article to the Standards

Other ideas:

- Could be interesting to explore the extent to which the standards are being used in LIS teaching.

With regards to the Analysis of Instructional Environments workbook, follow up with the librarians who commented on the ILI-L discussion "Environmental Scans" to gain possible best practice ideas to promote in using the workbook and possibly incorporating as revised workbook content.

This project was conducted by Sarah Naumann (lead) and Barb Mann. Reading through the original documentation gathered from the ili-l conversation on “Environmental Scans” in which a number of librarians discuss using the Workbook and recommend it to others, was the first step. This document can be found on ALA Connect: ACRL Management and Leadership Committee, Instruction Section: [ili-l-discussion-Environmental-Scans feedback NEW](#)

Sarah and Barb contacted people from that listserv conversation and had an additional contact who had presented on the Workbook. Splitting the list of contacts each sent out e-mails with specific questions that had been composed. E-mails were sent out on and around February 10, 2014.

1. How have you used the Workbook?
2. How useful has the Workbook been to your institution?
3. Have you noticed any areas of the Workbook that could be revised in order to make it easier to use?
4. We are looking to find "best practice" ideas for using the Workbook. Do you have any ideas we can add to our list?

While only one contact responded, her response was very positive and helpful:

From: Huisman, Rhonda [mailto:Rhonda.Huisman@wichita.edu]

Sent: Monday, February 10, 2014 3:00 PM

To: Barbara Mann

Subject: RE: ACRL IS Analyzing Your Instruction Environment Workbook follow-up Barb,

Great to hear from you! As you may have noticed, I’ve moved on from IUPUI, but the Workbook project hasn’t left me yet!

1. How have you used the Workbook?

I created the plan for using the Workbook at the ACRL Assessment Immersion track in Nov. 2011, and I led the instructional team (3 librarians and myself) through each section of the workbook during a year-long process of self-study. We modified the “Current Library Instruction” section so it was an interactive form (in Survey Monkey). Initially, we asked a small sample of faculty to answer questions about their instruction and assessment of information

literacy skills, but this proved to be too difficult to implement in an institution as large as IUPUI. Other sections of the workbook required collaboration from units across campus, including input from our institutional research office.

2. How useful has the Workbook been to your institution?

We were able to garner support from our PRAC (Programmatic Review and Assessment Committee) on campus, including a graduate student stipend, in order to move forward with our environmental scan. As a result of our work with the workbook, we were able to make significant changes to our information literacy website, the formation of a community of practice, and professional development workshops and training, as well as the inclusion of library resource/information literacy questions on the yearly campus-wide survey of faculty and students

3. Have you noticed any areas of the Workbook that could be revised in order to make it easier to use?

I've been asked about this project many times, and have suggested that anyone wanting to use the workbook decide on priorities and resources—don't do the entire thing at once, and plan for many unknowns/roadblocks, particularly if you are looking for data in a variety of places (in or out of the library). Decide on one or two priorities, give a realistic estimate of time and resources needed, and have a plan in place for where data and information will be stored and/or disseminated. The "Current Library Instruction" section really is curriculum mapping...but if you do not currently map outcomes or objectives on your campus; this can be an impossible task to expect librarians to accomplish (depending on departmental relationships, level of embeddedness, experience with education/andragogy, etc.). The workbook offers the background (in the intro to this chapter) but the number of performance indicators, goals, etc. are overwhelming—simplifying this section, or suggesting that a committee focus on just one performance indicator (or even one or two outcomes) would be a great start.

4. We are looking to find "best practice" ideas for using the Workbook. Do you have any ideas we can add to our list?

- a. Don't do the whole workbook, unless you have dedicated time, resources, and people.
- b. Modify as needed—go electronic! Convert sections or questions to an online form or survey.
- c. Get IRB if you plan to collect any data and disseminate, or even if you don't. Much of this data might be subject to FERPA or IRB on your campus/in your state.
- d. Designate a place/space to collect all of the data prior to starting, and make sure everyone has access.
- e. What do you want to know, and why? What's reasonable and measurable?
- f. Make friends and extend relationships with faculty, institutional researchers, professional contacts, administration (and assistants)—much of this data is being collected on your campus already, but you just have to know who to ask.
- g. Timing is crucial—does this project fit in with strategic planning, accreditation, overhaul or reorganization? It can be low or high stakes, depending on when you decide to move forward. Who wants your data, and why?

My paper on this project will be published in the ARL Library Assessment conference proceedings (hopefully this year) but I am happy to answer any other questions! Please give me a call. Best of luck to the committee!

Thanks,

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3. The next idea was to send out an email to the ili-l listserv asking if anyone has used the Workbook and if so, do they have ideas for best practices. E-mail sent April 28, 2014

Dear Colleagues,

I am a member of the ACRL Instruction Section's (IS) Management and Leadership committee, which is charged with promoting the ACRL document titled Analyzing Your Instruction Environment: A Workbook.

<http://www.ala.org/acrl/aboutacrl/directoryofleadership/sections/is/iswebsite/projpubs/aie>

We are gathering information from users to help us as we look for ways to further promote the use of this assessment tool.

If you have used the Workbook, we are interested in learning about your experience. In particular, we are looking to find "best practice" ideas for using the workbook. Do you have any ideas we can add to our list?

Thank you in advance for your comments.

Sarah Naumann, MLIS
ACRL Instruction Section, Management and Leadership Committee
Literacy Program Coordinator, San Mateo Public Library
Instruction Librarian, CSU East Bay, Adjunct

We received one response from the listserv:

Hi, Sarah -

I have used the workbook in my role as coordinator for information literacy at my institution. Or maybe I should say I tried to use it, because the level of detail in the workbook was so daunting. When combined with the difficulty at my institution of getting some of the numbers called for, I had to backburner the project.

That's probably not very useful feedback, except as a reminder that in some contexts the tool may prove difficult to use because of external factors.

I think it's a great idea and I was certainly very excited when I discovered it, but actually getting the data to power the assessment proved my downfall.

Lisa

Lisa Louis
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In response to her email, Sarah asked Lisa these questions:

1. Are you referring to getting numbers/stats from departments outside of the library, from different departments?
2. What tools did you decide to use (instead of the Workbook) to create your assessment?

Lisa's response to Sarah's questions:

Hi, Sarah -

Yes, that's what I meant. We don't have a very robust Institutional Research department compared to what I've seen at other institutions, so getting numbers I would have taken for granted – about enrollment for example – is quite difficult.

The assessment project is actually in limbo. We have just hired a new library director and I'm waiting until she is on board to ramp it up again, so that she can have some input into that process.

Good luck with your work on this. It's a valuable tool but there can be implementation issues unique to each institution, I suppose.

-Lisa

Summary and next steps:

Valuable information was received even if from only two respondents and this information can be used to create a survey. Rhonda has extensive experience in using the Workbook and her comments and best practice suggestions include information that may help others, like Lisa Louis, who also experienced setbacks while using the Workbook.

The next recommended step is to send out a survey via a variety of listservs in order to broaden the pool of respondents and gain more information needed to contribute to a best practices document.