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# Listening to the Customer: Using Assessment Results to Make a Difference

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# Listening to the Customer

## Using Assessment Results to Make a Difference

Catherine Haras, Richard Moniz Jr., and Annie Norman

*The following feature is adapted from “Listening to the Customer: Using Assessment Results to Make a Difference,” a panel discussion delivered on July 12, 2009, at the American Library Association Annual Conference in Chicago and sponsored by the LLAMA LOMS PELS Committee. The three program participants have written up their remarks to share their practical knowledge with those who could not make it to the session. With sequential changes in voice and a first-person style, the intent of this article is to capture the conference program experience in print. In addition, a list of selected background readings which provide additional context for the topic is included.*

**T**asking any kind of library with program assessment is a challenge. Whether the library in question is public or academic, measuring effectiveness, satisfaction, or any other performance indicator such as service quality involves a thoughtful consideration of what it is that needs measuring. If assessment is undertaken without focus on properly aligned inputs (resources), outputs (what is done), and outcomes (why it is done), then the job can seem like an empty exercise, or, worse, result in the wrong data collection. However, for developing program efficacy, nothing succeeds like successful assessment. True assessment uses appropriate outcome measures, and good outcomes should lead to measurable outputs that demonstrate how well original outcomes have been met. While there are documented setbacks with devising assessment metrics, there are also exemplars that model success for libraries that want to measure the quality of their own programs. Every library should attempt to identify a practical method of assessment so that library services align with customer expectations. This paper reviews evolving assessment efforts as these inform program development at three

different institutions: California State University at Los Angeles, Johnson and Wales University at North Carolina, and the State Library of Delaware.

### Literature Review

The assessment literature for libraries is sturdy, but has tended to split along library type. For example, instructional assessment dominates the higher education literature on academic libraries, which have long sought to measure student learning.<sup>1</sup> Meanwhile, public libraries have focused on management and planning processes as these benefit users and make economic and other contributions to the community; public libraries are noticeable for their breadth of planning tools compared with academic libraries.<sup>2</sup> However, the changing nature of the work ensures that libraries of all stripes are evolving a need to measure a variety of programs and services. Sometimes the literature cross-pollinates: While instructional assessment is a core activity for successful academic libraries, instruction is becoming an increasingly important focus for public libraries as well. One continuing problem with assessment is the uneven quality of tools and lack of standardized definitions. Libraries interested in devising meaningful outputs that achieve direct outcomes should consult Hernon and Dugan, *An Action Plan for Outcomes Assessment in Your Library*.<sup>3</sup>

## Assessments in Information Literacy

Catherine Haras, California State University at Los Angeles

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*Computer Science, and the master's program for applied biotechnology, among others. She also helped to develop the California State University at Los Angeles freshman experience equivalent, which has an information literacy requirement. She has been honored by California State University for her work.*

## Institutional and Library Background

California State University, Los Angeles (CSULA), is an eighteen thousand-student commuter campus located in East Los Angeles. This comprehensive southwestern university has an urban mission and is designated as an Hispanic-Serving Institution (HSI). California State University has long been a leader in fostering support for information literacy at its twenty-three campuses. Nonetheless, campuses like CSULA have built unique programs based on their local culture and other legacy issues.<sup>4</sup> The CSULA Library has a growing information literacy program and fourteen librarians. Five librarians teach intensively. The library's output is significant: It delivers research instruction to more than eight hundred classes a year, reaches almost fifteen thousand students in the classroom, and has developed solid liaison relationships with various academic departments.

## Building Campus Support through Assessment

Assessment has grown hand-in-hand with the CSULA information literacy program, as the two inform each other. During the past five years the library has implemented several assessments to serve multiple outcomes. Outcomes were centered on student learning, faculty participation, and program effectiveness. Student learning-based outcomes were to reach our special constituency of students (since the library plays a critical role in retention) and to improve students' research skills. Faculty outcomes were to build faculty awareness and buy-in in order to collaborate on information literacy projects in the classroom and to revise campus policy on information literacy. Program outcomes were to increase the quality of the library's instruction program and to ensure successful program, WASC (Western Association of Schools and Colleges) capacity, and educational effectiveness reviews (2006–10).

To some degree these outcomes are interdependent, so strategic data collection was critical. The library involved all campus stakeholders early in the process, including students, faculty, and administration. To this end, we used measures that were by turns homegrown and standardized, direct and indirect, and qualitative and quantitative, on the basis of type, need, and stakeholder.

## Understanding the User

The library used a research-based approach to assessment and began by first investigating the information habits of students. Many CSULA students are Latinos who are first-generation college students. This demographic was well worth researching as a means of creating better library curricular interventions and outreach. However, the literature was outdated or emerging. The information literacy coordinator obtained several grants and conducted an exploratory study on Latino information seeking behaviors.<sup>5</sup> Findings were used to improve curriculum but also provided evidence to support other outcomes. Libraries seriously interested in evidence-based library practice should consult works by Booth and Brice, and by Connor.<sup>6</sup>

## Measuring Student Learning

After investigating evidence-based approaches, the library established core student learning outcomes (SLOs) based on the Information Literacy Competency Standards of the Association of College and Research Libraries (ACRL).<sup>7</sup> Those outcomes were then directly measured via a homegrown quiz. In this quantitative measurement, quiz questions were mapped to the ACRL Standards. An early version was tested in a series of four focus groups. Data collected from the groups were used to refine the instrument. The resulting twenty-seven-item quiz was administered virtually to eighty-five sections of a freshman-experience equivalent course (Introduction to Higher Education 101/301) for the incoming freshmen and transfers during five consecutive quarters in 2005–06. The quiz assessed basic elements of the research process, for example:

Which of these keyword searches should retrieve the **most** results in an online database?

- Civil War AND United States
- Civil War OR United States (38 percent answered correctly)
- Civil War
- Civil War NOT United States

Overall, student respondents (N = 2,835) demonstrated below average research skills. The median score was 71.5 percent, or a C. Moreover, community college transfer students were no more likely to correctly answer questions (mean score = 73 percent) than were entering freshmen. The hardest questions for students to answer correctly were related to source evaluation, citation reading, and database (boolean) search logic and query execution. Curricular focus in the library then concentrated on interventions.

Data collection confirmed earlier findings: Many students fit the Millennial demographic. Students were gamers, loved group work, and were reading-averse. Moreover,

we noticed that the online quiz, which was given before classroom instruction, provided a reflective moment and motivated students to focus on the library session once they had self-assessed. Building on this assessment, we created a Jeopardy-type game that students could play in teams and that would satisfy part of their library orientation. The library also created an online research tutorial. Assessments are tied to both the game and tutorial. Introduction to Higher Education, the campus equivalent of a freshman-experience course, was completely transformed to include critical thinking and a strong information literacy emphasis. In 2006 a new course version was piloted by the College of Natural and Social Sciences, and was adopted by most campus colleges in 2009. A library orientation and workshop are now mandatory. The library has also collaborated with various colleges to embed library instruction in the gateway courses Biology 155 and English 102. Instructors in these courses are responsible for information literacy assessment.

In another quantitative measure of student skill, since 2005 the library has participated in the Educational Testing Service's (ETS) iCritical Thinking information assessment. This commercially available standardized test assesses information, computer, and critical reasoning skills in a virtual environment. The CSULA College of Business and Economics has been the primary adopter of the iCritical Thinking assessment on campus, testing more than five hundred students in six sections of an upper-division business communications course over a two-year period. Implementing this assessment on campus provided data for business and WASC accreditations.

Assessing the information literacy of individual students is finally a function of the classroom. Direct assessment is typically accomplished via bibliographies, that is, for projects requiring the demonstration of research and other critical thinking skills. Measures at CSULA include such assignments given in the freshman experience course and capstone or required courses in the discipline. However, these assessments are only as strong as are collaborations between the library and an academic department. The library also provides direct assessment of student learning in its library courses.

## Measuring Faculty Perception

Global student data were also used to persuade faculty to revise campus information literacy policy. Concurrent with

student assessment, faculty were queried on their perceptions of their students' information skills. Qualitative data were gathered via focus groups and an indirect survey. To create the faculty survey and to generate an adequate response rate, an information literacy advisory committee consisting of eighteen influential faculty, administrators, and librarians was convened in 2006. The advisory committee held five faculty meetings on information literacy and student learning. It also devised a twenty-question survey hosted by SurveyMonkey of faculty perceptions of student information literacy. The survey was sent out to the entire campus by e-mail, reaching a generalizable 30 percent of tenured faculty (N = 235).

This indirect survey revealed a gap between faculty perceptions of student ability and actual student ability (see table 1).

Based on the results of the faculty survey, a well-attended symposium on information literacy and technology was held on campus in 2008. An increase in the number of departments seeking consultation with the library on research outcomes for their programs has slowly accelerated since then.

## Measuring the Program

The efforts described above are foundational and dependent on continuing collaboration and periodic reassessment. The program's overall success is measured by sustainability and growth. The library has a steady stream of clientele (departments and programs) fostering discipline-specific information literacy initiatives. Departments such as English, Liberal Studies, History, and the School of Nursing have since adapted these competencies in developing their own assessable information literacy outcomes. The College of Engineering, Computer Science, and Technology, and the School of Nursing have created mandatory and elective information literacy courses, respectively, on the basis of library credit-bearing models.

As a direct outcome of these measures, library and campus curriculum has changed. The CSULA campus policy on information literacy was revised in 2008. Information literacy instruction at the foundational level is now embedded in the freshmen and transfer experience courses, and, at the upper-division level, information literacy is now the responsibility of the department or program and is assessed during an academic program review. The Program Review subcommittee held a self-study during

**Table 1.** Faculty Perceptions of Student Ability

| My students can:                                 | Strongly disagree | Disagree | Agree     | Strongly agree | Don't know |
|--|-------------------|----------|-----------|----------------|------------|
| <b>a. Narrow or focus a research topic</b>       | 3% (6)            | 14% (28) | 62% (125) | 11% (23)       | 9% (19)    |
| <b>b. Formulate a search query</b>               | 3% (6)            | 15% (30) | 57% (114) | 10% (20)       | 15% (31)   |
| <b>f. Read or trace a bibliographic citation</b> | 3% (6)            | 17% (34) | 53% (107) | 8% (16)        | 19% (38)   |

2006–7; the review process now formally requires evidence of information literacy. Finally, in 2009 new campus-wide institutional outcomes were drafted, and information literacy is now included as a key student learning outcome.

An increase in consultation on programmatic information literacy and assignment design means the model is sustainable and does not always require a librarian. Changes have empowered librarians to develop more credit-bearing courses and faculty to take information literacy into the classroom.

## Take Away

While assessment efforts described here took place in an academic library setting, the process has value for any public library seeking to assess patron learning. For public libraries the lessons are similar:

- Students, especially K–12 students, are a core constituency in public libraries. The fact that many students depend on their public library to do their research should encourage public libraries to assess student learning and habits of research for purposes of improvement. Public libraries might consider pairing with local K–12 schools to assess how students are using their collections.
- Accept legacy issues particular to your library and community. Take advantage of the administration you have and grow your program locally.
- Accept that while the process may not look formal (even messy, in fact), this guarantees meaningful engagement between stakeholders.
- Find influential gatekeepers in the community who can advocate for you and cater to any unique constituencies.
- Gauge the tolerance for change within your library. Focus groups might be held for librarians first, since they will drive the program (or won't). Dialogue with influential librarians; allow everyone who wants to do so to become part of the process.
- Develop the pedagogical skills of librarians. Increasingly, librarianship is a teaching profession.

The library's information literacy program at CSULA was recently commended during a 2009 WASC accreditation visit. Although nascent, the program is successful precisely because the library has continued working with and involving stakeholders directly by providing various levels of curricular support. Depending on your library and your culture, you may identify new stakeholders who will ultimately drive your program. Pay attention to them. Every library presents unique opportunities for programmatic development.

## Using Multiple Assessments to Make a Difference

Richard J. Moniz Jr., Director of Library Services at Johnson and Wales University, Charlotte Campus

*Richard Moniz, MA (History), MLIS, EdD, is Director of Library Services at Johnson and Wales University in Charlotte, North Carolina. In his thirteen years with Johnson and Wales, he has opened two new campus libraries. Dr. Moniz has also taught library administration for the University of North Carolina at Greensboro and has recently published a textbook on library administration entitled Practical and Effective Library Management.*

## Institutional and Library Background

Johnson and Wales University was founded as a business school in Providence, Rhode Island, in 1914. Over the years, the institution has grown to include bachelor's degree programs through its College of Business, College of Culinary Arts, and Hospitality College. Each of these separate colleges are connected, in turn, to a School of Arts and Sciences which supports each of its programs by providing traditional college coursework in areas such as English composition, math, science, history, and so on. At the Providence campus location, master's degree programs and a doctoral program in education are also available. All of Johnson and Wales University's degree programs focus upon hands-on learning with a career focus. In addition to its location in Providence, Johnson and Wales University has three branch locations—in Denver, Colorado; North Miami, Florida; and Charlotte, North Carolina. I served as the Director of Library Services at the Florida campus from 1997 until 2004. In 2004, I moved to North Carolina to serve as director of library services.

The assessments and changes discussed below span from 2003 to 2009. Thus some of the changes implemented in Florida, particularly those that were implemented at least partially as the result of a LibQUAL+ study, were implemented by my replacement, Nicole Covone. To give some understanding of staffing in both the Florida and North Carolina locations, the Florida library staff consists of four librarians, one library assistant, and numerous student work study employees, whereas the North Carolina library staff consists of six librarians, one student library assistant, numerous student work study employees, and often between one and three interns from the Graduate Program of Library and Information Studies at University of North Carolina at Greensboro.

## LibQUAL+

LibQUAL+ is a standardized tool for measuring user satisfaction with regard to library services. LibQUAL+ seeks to measure user satisfaction in three general areas: “affect of service,” “library as place,” and “information control.” These areas are measured by asking library users, on the basis of twenty-two different statements, to rate the library along a nine-point Likert scale: How they would minimally rate library service levels, how they actually perceive specific library services, and how they would ideally rate the library on a given service measure. These numbers are then used to compute a service adequacy score (the difference between average minimum expectations and average actual scores) and a service superiority score (the difference between average ideal scores and average actual scores) for each statement.

During the 2003–4 academic year, I led the process of collecting LibQUAL+ data across our Florida, Rhode Island, and Colorado campuses. One of the biggest challenges was coordinating a single implementation across multiple geographic locations. Another challenge was in separating the data afterwards and recomputing scores. Since LibQUAL+ was essentially designed to examine one specific library location, I needed to extract each location’s data separately.

There are any number of ways that one can interpret LibQUAL+ data. Looking specifically at the information culled from the Florida campus, one could look, for example, at the lowest rating in each category. In our case, the following three items stood out as having the lowest scores in each:

- *Affect of Service*—Employees who instill confidence in users (-1.84)
- *Library as Place*—Library space that inspires study and learning (-1.7)
- *Information Control*—Easy-to-use access tools that allow me to find things on my own (-1.64)

We believe that the issue regarding a possible lack of confidence in employees was related to some of the interactions patrons were having with our student work-study employees who assisted at the circulation desk. With regard to library as place, we knew already that we had some noise issues. Lastly, we sensed that the issue regarding access tools was less about the lack of these and more about the lack of *awareness* of these.

It should be noted that, in addition to the data above, we categorized and evaluated the content from a comment box as well. Comments included needs for more computers, more computer access, more business-related and recreational books, and a greater awareness among the student body as to what was available through the library website.

Partially as a result of student concerns, the following changes were put in place:

- A McNaughton collection was added to provide access to popular fiction.
- Business databases were more widely publicized, and a partnership was arranged with the career development office to encourage greater database use by students.
- Computer terminals and wireless access were added to the library.
- More work-study training was conducted and spread out over time.
- More structured study room use was implemented.
- A blog and instant messaging service were created.

## The Charlotte Campus Library Opens

In 2004, I was asked to oversee the startup of the library at our Charlotte campus. As part of my duties, I was asked to develop an initial strategic plan. In doing so, I was deeply concerned that we embed ways to listen to our users. As such, one of the six goals in our initial strategic plan began as follows:

Goal #3: Create a library focused upon the idea of continual assessment which views the entire academic community as key customers.

This served the dual purpose of addressing how the library would operate and preparing us for both NEASC (New England Association of Schools and Colleges) reaccreditation and North Carolina licensure.

## Annual Surveys

One of the foremost means of listening to our customers has been through the use of an annual survey. This was one of the first tools that we used to listen to students and faculty. Each year we have launched our annual survey using Zoomerang to determine a number of things about our users. While we collect self-reported use statistics and often include a variable question or two (focused on a particularly relevant immediate concern), the bulk of the questions focus on student satisfaction with the library. These questions remain the same, so that we are able to measure over time student perceptions of the library.

Here are some of the concerns that we have discovered through our annual surveys:

- There were not enough accessible hours, especially Saturdays and weekday evening hours.
- There was a need for greater functionality in library computers (most computers in the front area of the

library were just terminals).

- There was desire for popular fiction and movies.
- There was a need for more comfortable seating and furniture.
- Students valued quiet over access to their cell phones.
- Loan periods were too short.

As a result of this feedback, a number of changes were made, such as the following:

- We added additional weekend and evening hours.
- We added an additional twenty-six full-service PCs in the front area.
- We added the “Percolator,” a collection that features popular books and videos.
- We added a variety of décor and comfortable furniture.
- We crafted a more stringent noise policy.
- We increased both loan and renewal periods.

### **SAILS (Standardized Assessment of Information Literacy Skills)**

The SAILS instrument, or Standardized Assessment of Information Literacy Skills, was created to measure information literacy on a global scale (that is, exploring all aspects of the Association of College and Research Libraries’ Information Literacy Competency Standards for Higher Education). When we think of listening to our customers, we also believe it necessary to include a component that measures not just satisfaction but also abilities as they relate to what we teach, both as students enter Johnson and Wales University and as they move through their curriculum. As such, we felt that SAILS might be a good tool for us to employ in this regard. We began sampling students in the 2007–8 academic year and continue to do so.

The following are a few points that we learned from some initial examination of our data:

- Ours students are relatively average both overall and in Standard 4 (evaluating information) where we focused most of our efforts.
- The scores of our students were slightly better than average on Standard 2 (accessing information effectively).

As a result of what we learned, we took the following actions:

- We revamped our required information literacy module on evaluating resources, providing additional examples (a one-hour session also became a two-hour session).
- We incorporated formative assessment and clickers into the standard session to test for understanding throughout the lesson.

### **SWOTs**

SWOTs, or Strength, Weaknesses, Opportunities, and Threats analysis, is something that has been employed in the for-profit world for a long time. SWOTs is essentially a brainstorming process that focuses employees on the task of considering what the greatest strengths, weaknesses, opportunities, and threats are relative to a particular organization. This data is then typically used to make immediate changes or to inform the planning process.

In our effort to understand customers, we have explored the library staff perspective by using the SWOTs method. Specifically, we went through this exercise together toward the end of our first year of operation. Results indicated concerns about non-culinary arts collections (especially business-related books), the consistency of student work-study performance at the circulation desk, a lack of library hours, and a cumbersome purchasing and cataloging process.

As a result of these findings, the following changes were made:

- More funds were dedicated to improving the business collections.
- Greater emphasis and planning was implemented with regard to training work-study employees.
- Additional Saturday and evening hours were added.
- We changed from our old vendor to Ingram and to in-house cataloging.

### **Focus Groups**

One last approach to be mentioned here that we have used is focus groups. Again, like SWOTs, focus groups have been used by marketers in the for-profit world for a long time. Focus groups are useful because they allow one to drill down further into findings from a survey-type instrument and to explore an issue in much more depth than would be possible when listening to the customer in other ways. In spring 2009, we conducted two focus groups with business students on our campus. The following are a few of the things that we learned from our efforts:

- There were still concerns about hours, but the main concern in this regard was during finals weeks.
- There was a need for white boards in the student study rooms.
- There was a need to do better at marketing library resources.

As a result of these findings, the following actions were taken:

- I met with the president of the Student Government

Association and started initial planning for a “finals week experience” starting in the fall of 2009. This would include increased hours, but also involve other departments such as the Center for Academic Support and Student Life as well as faculty from the various colleges.

- We immediately installed white boards in our student conference rooms.
- We conducted more outreach at the end of the academic year and planned a more aggressive outreach campaign for 2009–10.

## Newsletter and Blog

When you listen to customers and make changes as a result, you need to close the loop. For our first 3½ years of operation we put together a monthly newsletter called “The Queen City Brew” (replaced later by a library blog). Following our annual surveys and discussions about the results with the library staff and the Library and Information Literacy Committee (which has faculty, ITS, and student representation), I used this venue to directly respond to student and faculty concerns.

## Conclusion

While the above approaches do not constitute a complete list of the ways that we listen to customers, these are some of the most important tools we have used. While standardized instruments such as LibQUAL+ and SAILS have great value in our comparing data to that of other institutions, I believe that we get our best information from our more targeted and institutional-specific approaches. Our annual survey always provides us with great insight into the needs of our students and faculty. Additionally, we plan to extend the use of focus groups in the future to include our culinary arts and hospitality students and to explore student use of the library along various other dimensions as well. Another interesting finding was how much the data overlapped. Triangulation of data presents some compelling evidence that we are hearing our customers properly and, thus, hopefully instituting changes that are meaningful to them. Lastly, all of our data, but most especially our focus groups, have taught us the need to pay special attention to those different constituencies that make up a broader group that we often simply consider “customers.” For example, the needs of a freshmen culinary arts student will be different than those of a faculty member in the college of business. The most important thing, however, is that we keep listening and that we keep an open mind toward change that benefits those whom we serve.

# Delaware Libraries: Quality Learning Journey

## Annie Norman, State Librarian of Delaware

*Annie Norman has worked at the Delaware Division of Libraries/State Library since 1985 and has been director and state librarian since 2002. Norman has a master’s degree in library science from Drexel University and is a member of Beta Phi Mu, the international library and information science honor society. She is currently working on a doctorate of education in organizational innovation and leadership at Wilmington University. Under her leadership, the Delaware Division of Libraries received the Delaware Quality Award of Merit and the Delaware Library Association Institutional Award in 2005 in recognition of performance excellence principles and practices. Norman was a recipient of the Governor’s Team Excellence Award in 2006 for public libraries’ participation in the Department of Natural Resources and Environmental Control Energy Answers program.*

Annie Norman is leading the Delaware library community on a quality learning journey to learn about tools that businesses use to achieve performance excellence. One mechanism that is used for Listening to the Customer, Delaware Library Learning Journeys, is described here.

The Delaware State Library has been on a quality learning journey since 2002, learning about tools that businesses use to achieve performance excellence. The journey has involved training and assistance from quality consultants with active participation from members of the Delaware library community. In 2008, lessons learned so far were published in *The Measure of Library Excellence* by Wilson, Del Tufo, and Norman.<sup>8</sup> In summary, we recommended that libraries learn about and apply these key business tools in the following sequence:

- Baldrige Criteria ([www.nist.gov](http://www.nist.gov)): a comprehensive checklist and assessment tool that ensures that we are tending to every aspect of our organization in order to ensure success.
- Balanced Scorecard: a tool to organize our strategic objectives and our measures.
- Lean Six Sigma: a tool that helps improve individual processes. Two dozen Delaware librarians are certified Six Sigma Green Belts.

We began by establishing the vision for Delaware libraries: We want Delaware libraries to become the best in the nation, and we want every Delawarean to have a library card and to use it often. Since 2002, active library card holders have increased from 40 percent to 60 percent of the Delaware population.



## Recommended Readings

Blazey, Mark L., *Insights to Performance Excellence: An Inside Look at the 2009–2010 Baldrige Award Criteria*. Milwaukee, Wisc.: ASQ Quality Press, 2009.

Brown, Mark G., *Beyond the Balanced Scorecard: Improving Business Intelligence with Analytics*. New York: Productivity Press, 2007.

Collins, Allan. “How Society Can Foster Self-directed Learning.” *Human Development* 49, no. 4 (2006): 225–28.

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Marie, Kirsten L., and Janine Weston. “Survey Says: Online Survey Tools for Library Assessment.” *Library Media Connection* 28, no. 2 (2009): 50–53.

Marx, Gary. *Sixteen Trends, Their Profound Impact on Our Future: Implications for Students, Education, Communities, Countries, and the Whole of Society*. Alexandria, Va.: Educational Research Service, 2006.

Moon, Jennifer A. *Learning Journals: A Handbook for Reflective Practice and Professional Development*. London: Routledge, 2006.

Nelson, William Neal, and Robert W. Fernekes. *Standards and Assessment for Academic Libraries: A Workbook*. Chicago: ALA, 2002.

Pink, Daniel H., *A Whole New Mind: Moving from the Information Age to the Conceptual Age*. New York: Riverhead Books, 2005.

Salem, Joseph A., and Carolyn J. Radcliff. “Using the SAILS Test to Assess Information Literacy.” In *Building Effective, Sustainable, Practical Assessment: Proceedings of the Second Library Assessment Conference (Charlottesville)*. Washington, D.C.: Association of Research Libraries, 2006: 131–37. [www.projectsails.org/pubs/Using\\_SAILS\\_ARL\\_Charlottesville.pdf](http://www.projectsails.org/pubs/Using_SAILS_ARL_Charlottesville.pdf) (accessed Nov. 11, 2009).

Wilson, Despina D., Theresa D. Del Tufo, and Annie E. C. Norman. *The Measure of Library Excellence: Linking the Malcolm Baldrige Criteria and Balanced Scorecard Methods to Assess Service Quality*. Jefferson, N.C.: McFarland, 2008.

Next, we had to agree conceptually on our core business—our core purpose for libraries. Librarians tend to be philosophical, but we needed to “remove the emotion” temporarily in order to identify our core business in concrete terms. After several sessions and through heated debate, we finally came to consensus: Libraries’ core business is collections—in all formats, to inform, educate, and entertain. Libraries are in the learning business, and our core competency is the management and use of collections.

We then conducted a series of strategic planning processes to obtain all of the information we needed at one time in order to make improvements. Our strategy map and strategic plans are posted on our website ([www.state.lib.de.us](http://www.state.lib.de.us)) and are used by the library boards and friends to generate support for their libraries. Most of the strategic objectives that we are currently focused on relate to capacity; for instance, we are increasing the size of the library buildings. Our goal is one square foot per capita statewide. Currently, the number of library card holders is coasting ahead of the square footage available, which means that the libraries are crowded. Another initiative is the Delaware Library Catalog, which will merge all multi-type library catalogs into a single database to facilitate collaborative collection development. The single catalog also enables the Delaware State Library staff to have access to live data in support of library development.

The Delaware Library Learning Journeys program is a mechanism that we use to obtain the voice of the customer for our quality initiative. Learning Journeys is a program that is held in libraries. It is a conversation with the patrons about their learning paths, to ask if they track their reading and learning, and to find out what they need next. Learning Journeys is an action research project to explore the phenomenon of self-directed lifelong learning in public library users. We listen to patron experiences with collections and library services in order to improve them, and we are developing learning organizers to support individualized informal learning. Participants receive a learning journal as an incentive to attend the ninety-minute program.

Libraries support all realms of learning. Libraries support individuals in lifelong learning throughout the lifespan, from cradle to grave. Libraries also support “lifewide” learning—learning across the various areas of life. The lifewide categories are distinguished by “who owns the question” or who is in control and is directing the learning:

- *Workforce development*—an imposed curriculum in which the employer owns the question.
- *Education*—also an imposed curriculum; the teacher owns the question.
- *Organizations*—straddle imposed and informal learning; the organization owns the question.
- *Free choice*—the *only* category where the learner owns the question.

In self-directed free choice learning, the learner owns the question and what is being studied, and decides when the learning is completed. Libraries can be much more proactive in helping individuals to discover their talents and personal learning path and to unlock learning obsessions. Regretfully, the standards-based approach in public education has resulted in passive learners, but provides an opportunity for libraries to take a stronger leadership role to engage individuals in their own learning. And, the timing is right. The Institute for Museum and Library Services (IMLS) recently released a new tool that encourages public library support of Twenty-first Century Skills for Lifelong Learning.

Through the survey conducted in the Learning Journeys programs, we found that approximately 60 percent of respondents already track their reading and learning using a variety of methods that they have devised, such as spreadsheets, notepads, notecards, and so on. The motivations for tracking reading and learning vary from keeping a log of books read to capturing ideas for later reflection. Also included in the survey are customer segmentation categories that were identified during an earlier study conducted by the Institute for Learning Innovation at the Dover Public Library. Participants are asked to rank their most common reasons for using the library; the “Explorer” category is most common among participants in Learning Journeys.

Participants in the Learning Journeys programs demonstrate that a significant number find tracking their reading and learning useful and that they respond favorably to sharing their learning paths. The next step for us is to operationalize Learning Journeys into a monthly program and to provide a “train the trainer” kit and training for library staff. We also continue to develop learning organizers to encourage and support curiosity. The most recent is the Question Journal for parents of preschoolers through approximately fourth grade.

Daniel Pink, author of *A Whole New Mind*, in his presentation at a Delaware Library Town Meeting, challenged Delaware librarians to create programs that will help individuals develop their unique talents.<sup>9</sup> The Learning Journeys program is an opportunity for us to listen to the customer, to strengthen our collections, and to provide individualized support to nurture talents. Learning Journeys is an innovative, more focused approach to supporting lifelong learning that makes the most of libraries’ core strengths to inspire individuals and communities to achieve their full potential.

Applying business tools and principles to libraries has been worthwhile for us, and has a lot of potential to strengthen the position and influence of libraries throughout our state. We recommend this approach to others,

along with our lessons learned (since the learning journey for us has not been a straight path). We recommend that the learning occur in this order: first, Baldrige Criteria, which is the foundation; next, Balanced Scorecard, the organizing tool to manage strategic objectives and measures; then Lean Six Sigma, which consists of tools to measure and improve effectiveness of library processes; last, but perhaps most important, the Learning Journeys program engages the public in conversations about their learning paths to provide feedback for library programs and services. Best wishes on your quality learning journey, and please share your lessons learned with us!

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