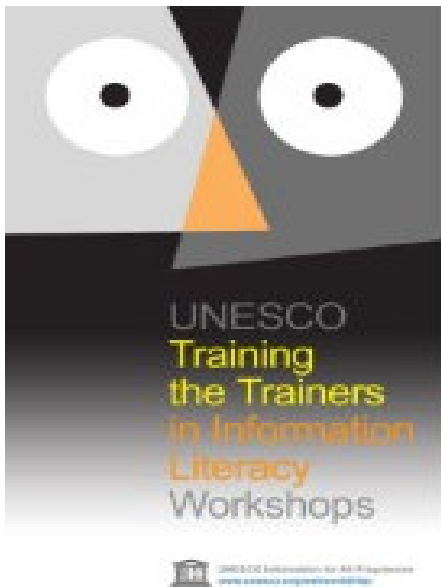


Designing an information literacy (IL) training programme: An introduction to strategic planning and purposeful advocacy



Barbie E. Keiser
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What we'll cover during this session

- Strategic planning for IL
 - Environmental scanning
 - SWOT/TOWS analysis
 - Critical Success Factors (CSFs)
 - The team
- Needs assessment
 - Methods for conducting

[And what we won't]

- Organizational structure and programmes within UNESCO
 - Education
 - Communication & information (IFAP)
 - Bangkok (<http://www.unescobkk.org/index.php?id=662>)
- Differentiating among education, training, and guidance
- ACRL Information Literacy IQ (Institutional Quotient) Test
(<http://www.ala.org/ala/acrl/acrlissues/acrlinfolit/professactivity/iil/immersion/infolitiqtest.cfm>)

What do we know about strategic planning?

- Concerns the relationship of an organization to its environment
- Involves wide-range scanning of external and environmental factors
- Flexible, dynamic and continually reworked plans maximize results
- Participative
- Shorter and longer-range plans are interwoven into a continuous strategy
- Forward-looking; future-oriented
- Iterative, ongoing effort
- Proactive; seek opportunities
- Bottom-up decision process
- Environment considered ever-changing and dynamic
- Integrated focus
- Requires creativity to deal with new opportunities and choices
- Incentives given for overall performance of the organization

[Key planning issues]

- Review past performance
 - Understand reasons for past failures
- Identify opportunities
- Determine client/customer and learner preferences
- Understand the impact of IL training on existing operations and staff function
- Marketing

[Potential planning pitfalls]

- Inability to get management and/or staff involved
- Lack of clear objectives
- Not relating IL goals and objectives directly to those of our organization/institution
- Other?

What strategies can we use to assure that we do not fall into these traps?

- Establish strong partnerships (Jamaica)
 - Early, strong, consistent, and growing
 - Be careful in selecting your champion (Quebec)
 - Listen
 - Be responsive
 - Learn how to say “no”
- Appreciate the art of persuasion
 - Tell stories (Quebec)
 - Storytelling trumps statistics
 - Demonstrate value to all stakeholder groups (WIIFM and ROI)
 - Share the information expertise of your staff with other knowledge workers
 - Added benefits?
 - Employ the vocabularies of target stakeholder groups (i.e., no library jargon)
 - Changing the message and the focus
- Demonstrate the need
- Place IL skills in context
- Identify where IL skills are already being taught/in use
- *An added bonus: A focus for our advocacy efforts*
 - “New” product(s) to “market”
 - Reinvented service
 - A case for proactivity in a way we haven’t seen before
 - Opportunity to market

Where are we in the strategic planning process for IL?

- Perform an environmental scan
- Conduct a SWOT/TOWS analysis
- Initial assumptions (and their bases in fact)
 - *Never assume!*
 - Extant data (collected and reviewed)
- Identify Critical Success Factors (CSFs)
 - Indicators → Measures
- Develop vision, mission, and values statements
 - Envisioning your IL programme

Environmental scanning

- Detects trends and events important to the project (IL training programmes)
- Provides early warning of changing external conditions
- Defines potential threats, opportunities, changes implied by trends and events
- Promotes a future orientation in the thinking of stakeholders
- Enables decision-makers to understand current (and potential) changes to determine organizational strategies
- What are the triggers in your institutions/ organizations/communities (i.e., indicators that IL training is needed *that will resonate with your community*)?

Performing a comprehensive environmental scan

- IL models and standards
 - **Methods?** (MyBookmarks)
- Your institution/organization/community
 - **Methods?**
- Previous IL (and other training) efforts
 - Understanding reasons for success/failure
 - **What kind of extant data do you collect (and review)?**

IL models and standards guidelines

- Country models
 - National Information Literacy Framework (Scotland)
 - Information Literacy Framework for Schools (Hong Kong)
 - Australian and New Zealand IL Framework: Principles, Standards, and Practice (ANZIL)
 - US School Library Media Center Questionnaire (http://nces.ed.gov/surveys/sass/pdf/0304/sass_ls1a.pdf)
- Big6 Information Problem-Solving Process (<http://www.big6.com/what-is-the-big6>)
 - Task definition
 - Information seeking strategies
 - Location and access
 - Use of information
 - Synthesis
 - Evaluation
- AASL (http://www.ala.org/ala/aasl/aaslproftools/informationpower/InformationLiteracyStandards_fin_al.pdf) and CASL (<http://www.cla.ca/casl/literacyneeds.html>)
- ACRL (higher education) guidelines (competencies) - <http://www.ala.org/ala/acrl/acrlstandards/standardsguidelines.cfm>, toolkit <http://www.ala.org/ala/acrl/acrlissues/acrlinfolit/infolitstandards/standardstoolkit.cfm> and <http://www.ala.org/ala/acrl/acrlstandards/informationliteracycompetency.cfm>
 - Five standards
 - Performance indicators (and outcomes for each)
- Seven Pillars (http://www.sconul.ac.uk/groups/information_literacy/sp/sp/model.html)
- Information Inquiry, Problem-Solving and Research Process

Conducting a SWOT analysis

- Useful when you need to understand your own competitive advantages
- Provides information helpful in matching your organization's resources and capabilities to the environment in which it operates
- Scan of the internal and external environment, beginning externally
- Environmental factors internal to the institution/organization/library/community = Strengths or Weaknesses
- Environmental factors external to the institution/organization/library/community = Opportunities or Threats
- Sometimes can be too inward

SWOT Analysis

Strengths



Weaknesses



Opportunities



Threats



[TOWS]

- An extension of the SWOT analysis
- Analyze the external environment (threats and opportunities) and your internal environment (weaknesses and strengths) to help you think about the strategy of your organization
 - Useful for marketing campaigns
- Threats and opportunities
 - External environmental factors over which you do not have control (changing demographics)
- Weaknesses and strengths
 - Internal factors (poor location; bad reputation)

TOWS Strategic Alternatives Matrix

	External Opportunities (O) 1. 2. 3. 4.	External Threats (T) 1. 2. 3. 4.
Internal Strengths (S) 1. 2. 3. 4.	SO “Maxi-Maxi” Strategy Strategies that use strengths to maximize opportunities	ST “Maxi-Mini” Strategy Strategies that use strengths to minimize threats
Internal Weaknesses (W) 1. 2. 3. 4.	WO “Mini-Maxi” Strategy Strategies that minimize weaknesses by taking advantage of opportunities	WT “Mini-Mini” Strategy Strategies that minimize weaknesses and avoid threats

What are the CSFs for your IL training programme?

[Key questions]

- Is your community ready?
 - What to do if it is not
- Is your institution/ organization's culture a barrier?
 - How to deal with that
- Where did the idea for IL training originate?
 - You or others

ACRL

- What do you want learners to be able to do?
- What do learners need to know in order to do this well?
- What type of instruction will best enable the learning?
- How will the student demonstrate the learning?
- How will you know that the learner has learned?

Source: Ruth Pagell, SMU

[Scope of your IL training]

- Comprehensive or narrow(er)?
 - Pilot project approach
 - One subject, that can then be extended to others
 - One tool, that can then be extended to similar tools
 - Our responsibility is to help learners make those connections!
- Focus on what the learner needs to know, teaching them *how to ask the right question* (if they want to get the right answer)
- Begin by asking what the learner already knows about the subject, and then....

Questions for the learner (Framework for IL – Scotland)

- What's the most likely place you will find the answer?: Was this choice “the best”?
- What words can you use to search effectively to improve on your existing knowledge?: Was the strategy “the best”?
- How do you know when you're finished?: Did learner assess correctly?
- Have you learned something new?
- Who else should know this (and how should this be shared - ethically)?
- How will you apply this now?
- What have you learned from this experience that you can apply elsewhere?

[Overview of the process]

- Goals and objectives
 - Strategies and tactics
- Target population
- Type of training
 - Alternatives
- Project planning

[Team approach]

- Who should be included on the team?
- Who is responsible?
- When is it due?
- Consider **what's needed to gain institutional commitment** and stakeholder “buy-in”

Needs assessment: Knowing your “market”

- **Definition:** a planned, systematic approach to determining the information needs of each distinct customer group
- **Purpose:** Help you develop training targeted specifically to each group and need
- Diverse set of learners, each with distinct set of needs
- Understand your targets
 - Why they need to improve their IL skills (direct impact)
 - What would persuade them that IL is important to their success
- Identify groups with related needs

[Methods]

- At-the-elbow
 - Usability-lite testing
- Easter egg hunt
- Interviews
- Surveys
- Focus Groups
- Questions
- Analysis

Interviewing techniques

- Know the lingo... enough so that you can ask sensible questions and understand the answers
- Decide in advance what each person is likely to be able to tell you
 - What he/she would be interested in talking about
- Show respect for each individual's expertise and explain your objectives
- Introduce yourself and why you are calling (in general terms)
 - Do not lie! You are not a student doing a research project.
- You are not conducting a survey; the objective is to engage them in conversation
- Allow enough time to do the right job: 2-3 hours to find the right source, exchange voicemails, conduct the interview, and write the summary
- If you are covering a field on a continuing basis, make interviews part of your routine
- Listen!
- Benefits of a two-on-one approach

[The interview]

- Begin with the general and work your way towards the items in which you are really interested
 - Ask the least sensitive questions first, and when they are comfortable, proceed towards the more sensitive. Ask the most sensitive questions last.
 - Develop models or hypotheses that address key questions
 - Focus on what's most important
- Don't take up too much precious time (< 30 minutes)
- Write a complete summary of the conversation. Capture both facts and nuances.
- *Do not tape the interview.* (Illegal in many jurisdictions, unless you notify the party, and that will put them on their guard and they'll likely not want to continue, or at least not be as forthcoming as you'd like.)
- Be an attentive listener
- Get referrals: Ask who else you should contact about the subject next
 - Mention who suggested that you call that individual

Characteristics of

■ Surveys

- Success based on the length, knowledge of questioner (if telephone survey is used), and list
- Important to pretest items/flow
- Introduction to participate/
- Intro to survey/Follow-up with non-respondents
- Anonymity/confidentiality
- Response rate
- Online
- Incentives to complete
- Time
 - Timing of release
 - Time required to complete
- Sampling
- Significance

■ Focus groups

- Less formal way of soliciting consumer feedback on products and services
- 6-10 people + experienced facilitator
- Need for ground rules
- 1.5 hours
- Record the session
- Disadvantage: small sample, so composition is key

When to use surveys and focus groups for information gathering

■ Use surveys when

- You need quantitative estimates/confidence intervals
- You have a clear idea as to the questions you want to ask (and how)
- You have the time to develop and test the instrument, and analyze and present the results

■ Use focus group when

- You need insights; quantitative estimates are less important
- Statistical analysis is not a necessity
- You want flexibility in pursuing issues discovered during your inquiry
- Limited in terms of time and/or budget

Finding participants for surveys and focus groups

- And how those methods influence the validity of your analysis

Tips for conducting successful interviews and focus groups

- Let participants talk, but facilitate the discussion
- May have a set of questions ... but do not force a slavish go-through
- Assure complete confidentiality – notes are aggregated, no names ever given out
- If need to “prime the pump”, refer to observations (“we noticed ...”) and ask for comments
- Be aware of interpersonal dynamics and politics
- Recognize that participants may not want to “look bad” & may tailor comments to what they think is “correct”
- Validate: Interesting, you are not the first to say so
- Use “others-find” technique (you too?)

Tips for conducting effective surveys

- Short - Fast – Easy – did I mention short!
- Clear, unambiguous (in terms of questions posed)
 - Ask only one question at a time
- Logical flow of survey sections
- Ranking of personal priorities (What means more to you?)
- Minimize the number of open-ended questions
 - <http://www.qsrinternational.com/>
- Do you agree with these statements made by your peers?
- Lead with interesting questions, enticing people to respond
- Include quick demographic questions *at the end* to aid in analysis

Questions to pose concerning facts

- Why should I believe it?
- Does the claim need evidence to support it?
- If there is evidence provided, how good is the evidence?
- Other plausible interpretations?
- What reasonable alternative conclusions are possible?

[Comments? Questions?
Suggestions?]

Thank you!

Barbie E. Keiser

barbieelene@att.net

bkeiser1@jhu.edu