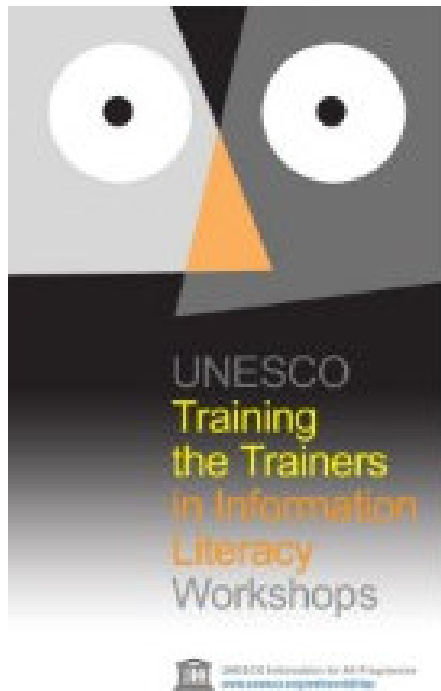


Strategies for implementing successful IL action plans

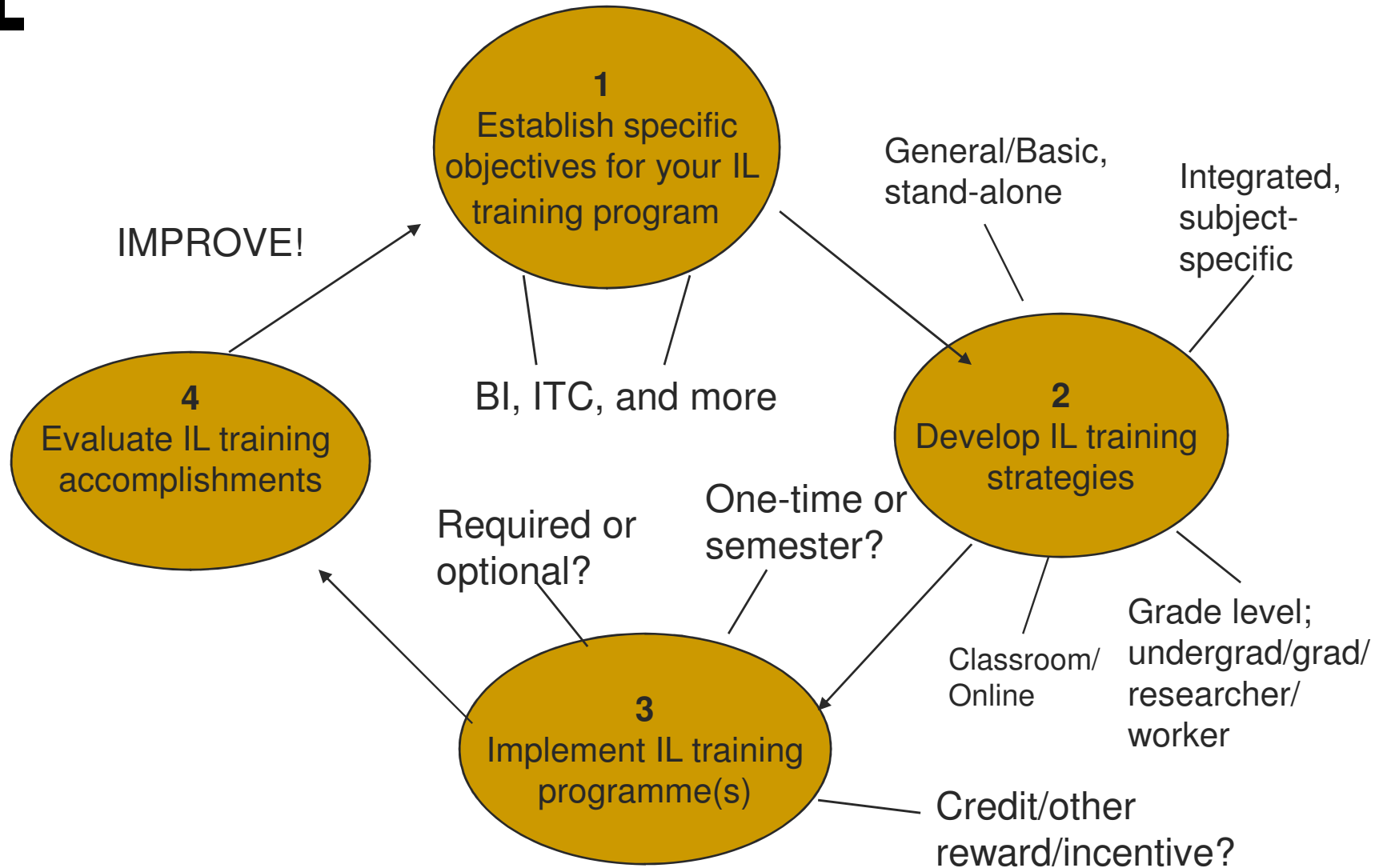


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UNESCO IL TTT Workshop
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What we'll cover during this session

- Moving from goals and objectives to who will do what (and when)
- Plus a bit on....
 - How the training should be delivered
 - Options available
 - Monitoring performance and measuring success
 - Student assessments
 - Overall programme, including cost/benefit (ROI) and value analysis

The overall goal is **information fluency** and developing the lifelong learner



[The Plan

- **Context**
- **Goals**
- **Objectives**
- **Positioning statement**
- **Key message(s)**
- **Target audiences**
- **Strategies**
- **Evaluation measures**

[1 a. Establish objectives]

- What (specific) competencies must your “audience” possess?
 - Focus on the ends, not the means
 - From four perspectives
 - Audience(s)/learners
 - Competence
 - Condition under which performance will be observed
 - Criteria for success
- What gaps must be addressed?
 - Identify required and *desired* proficiencies
 - Identify deficiencies (*and their causes*)
 - Identify non-training (e.g., availability equipment) and training (e.g., skills of trainers) issues
 - What innovative approaches can be used?
 - Benefits of blended learning
 - Social networks for viral spreading knowledge gained
 - Web 2.0 to reinforce over time

[Worksheet 1]

Competencies sought	Deficiencies identified

[The Plan]

- **Positioning statement:** How do you want the project to be perceived?
- **Key message(s):** What is the most important message that you wish to deliver?

Creating priorities within competencies sought (ISD)

- Based on the importance of knowing what your target learners need to DO
 - How frequently is the task performed?
 - How critical is the task to performance?
 - How difficult or complex is the task?
 - If a subset of collective tasks, what is the relationship among tasks?
 - To what extent will training for this task be encountered elsewhere? **Ability to apply knowledge**
 - What prerequisite skills, knowledge, and abilities are required to perform the task?
 - What is the current/desired criteria for acceptable performance?
 - What behaviors distinguish good performers from poor?
 - What behaviors are critical to the performance of the task?

Non-training and training issues

Types of causes	Questions to ask
Environmental factors acknowledge that training alone is unlikely to resolve performance gaps	<ul style="list-style-type: none">■ Will learners have adequate access to tools/technology, resources, or information to achieve these goals?■ What are the standards or expectations beyond the academic?■ Do “rules” facilitate or impede goal attainment?
Motivational factors align incentives/remove disincentives	<ul style="list-style-type: none">■ Are there mechanisms in place to measure performance and provide feedback to performers? Trainers?■ How do achievers receive recognition? What are the consequences of not attaining IL goals?■ What resistance exists?
Knowledge/skills	<ul style="list-style-type: none">■ Have all library staff (faculty) been trained to facilitate IL learning?

[People learn differently!]

- **Doers**
- **Thinkers**
- **Feelers**
- Seeing is believing vs. auditory (Wharton study)
- Importance of reinforcement
- Storyboarding, scenario building, case studies/examples

1b. Establish objectives

- How does each contribute to the overall strategic goal for **information fluency**?
- What approach(es) will you take?
 - **What has been successful for you in the past (and why)?**
- What **specific results (outcomes)** must be accomplished so that you can get closer to your goal of information fluency?
 - *How those results will be achieved is explained in Step 2*
- How will you “market” this effort?

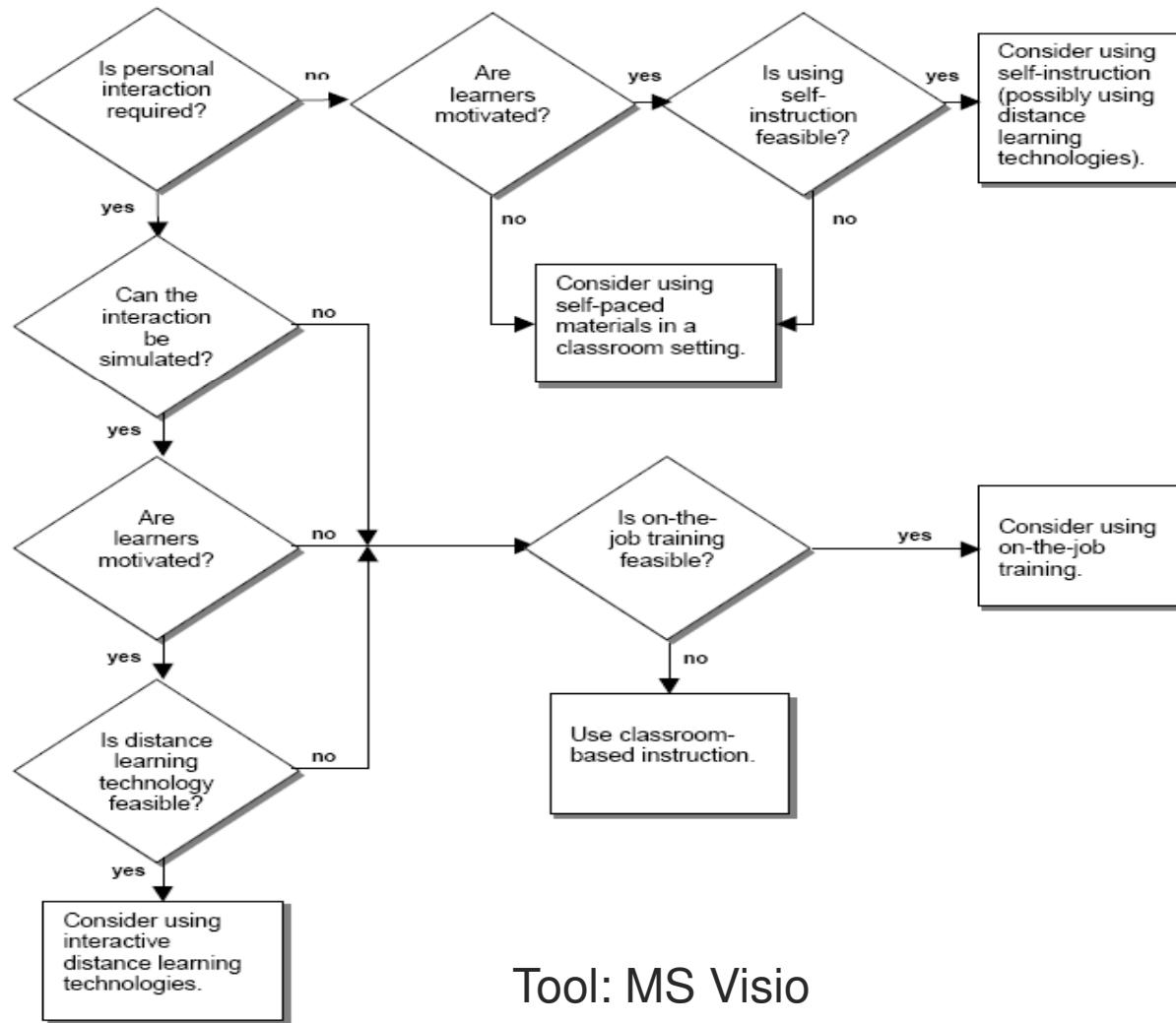
[Worksheet 2]

Objective	Rationale	Result/ Outcome	Assess- ment
For each objective, there is an activity or task		For each activity or task there is a result	
Expressed as a Verb		Expressed as a Noun	

[2a. Develop IL training strategies]

- What training (**content**) could address IL competence gaps?
- What **format** should that training take?
 - How do you make those decisions?
 - Staff competencies and time available
 - Generate alternative training strategies for addressing (specific) IL gaps
 - List all trainings considered/selected (and rationale)
 - What innovative approaches can be used?

Is “classroom” training appropriate?



Tool: MS Visio

[Training worksheet]

Types of training considered	Why use/discarded

[2b. Develop IL training strategies]

- What are the projected (life-cycle) **costs** for (developing and *implementing*) each type of training to be offered?
 - Specific **benefits** anticipated, both tangible and non-tangible?
- What are the consequences to the **organization** and library strategic goals of not offering IL training?

3. Implement IL training programme(s)

- Write your IL training goals and make them known
 - Collaboration, teamwork, marketing/pr
- **Identify performance measures and indicators (outcomes and impact)**
 - How will you benchmark performance prior to taking the training (e.g., pre-testing)?
 - Mechanisms for assessing IL post-training
 - Immediate and longer-term
 - Continuous improvement process
 - Measuring self-sufficiency achievements
 - Understanding Top Box scores
- Develop an **action plan**

[Action plans]

- Strategy
- Tactics
- Evaluation and control
- Results

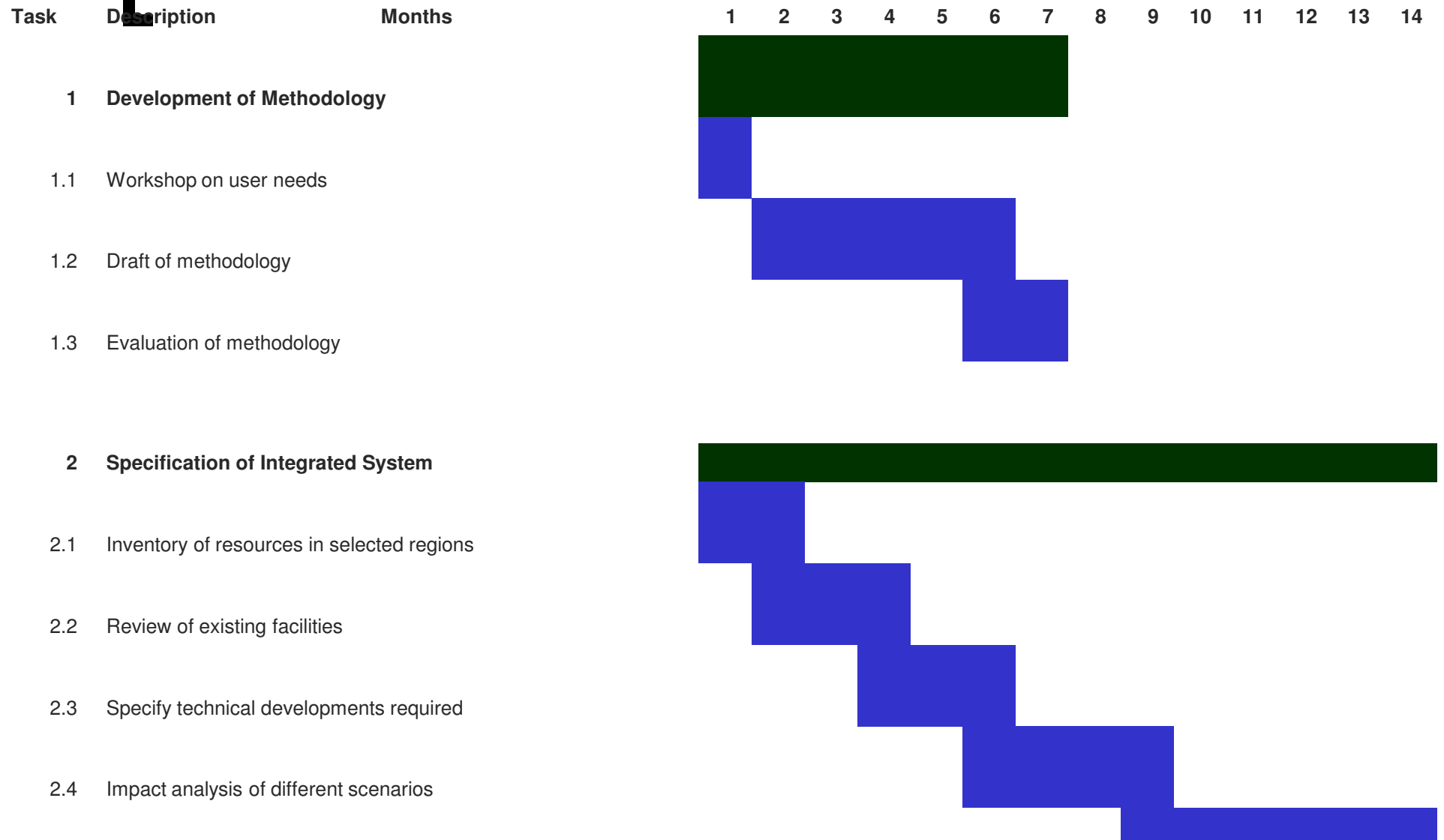
[Develop an action plan]

- What will be done?
 - Key tactics to support the strategies
 - Identify specific tasks to be completed
- By whom?
 - For whom?
- By when?
 - Timelines for each objective
- What resources are required (including financial)?
- Who should know/be involved?
 - Collaborators and stakeholders
- How will you “market” the effort?

[Worksheet 3]

Action step (initiative/task)	Requirements (Resources/\$)	Training Opportunity	Personnel (Lead)	Timetable
What			Who	When

Sample Gantt chart presentation



4. Evaluate IL training goal accomplishments (ISD)

- Did you achieve the training goal?
- How much did it cost?
- Did accomplishing your IL training goal help the organization/institution achieve larger goals?
- What modifications should be made to the plan, based on the evaluation findings?

[Training costs]

- Development costs (personnel and equipment)
- Direct implementation costs (e.g., training materials, instructor travel/per diem, facilities)
- Indirect implementation costs (overhead, G&A)
- Compensation for participants
- Lost productivity or costs of “backfilling” positions during training
 - Developer
 - Instructor
 - Faculty

[Training benefits]

- Time/resource savings
- Improved quality
- Error reduction
- Allow the learner to do something not possible before

[Your business case]

- Are the projected benefits (to the individual, library, faculty, school, organization, community) consistent with strategic performance goals?
- What are the consequences if IL training did not occur (or did not occur here)?
- Do the potential benefits outweigh the costs?
- What is the value added from closing IL competency gaps?

Best practices for implementing training programmes

- **Demonstrate results:** Performance measures should tell each target group how well it's achieved its goals (individual, faculty, library, school)
- **Limited to the vital few:** Measures should cover key performance dimensions – Too much data may obscure rather than clarify (expensive)
- **Link to departments:** Performance measures should be linked directly to offices responsible for making training work (library and faculty)

How can we assess learning and training goal achievement?

- Pre- and post-testing
 - Delayed post-tests
 - Anonymity
- Interviews (in-person, phone)
- Survey
- Work samples/co-grading reports
- Existing monitoring and reporting mechanisms (extant data)
- *Each data collecting method has advantages and disadvantages*

Moving from teacher-centered to learning and learner-centered training

Learning Goal	Learning Objective(s)	Learning Outcome(s)

Source: Cox and Lindsay

Measuring targeted learning behaviors

Targeted behaviors	Not proficient	Low proficiency	Proficient

Source: Cox and Lindsay

[Worksheet 4]

Objective	Rationale	Result/ Outcome	Assessment (method and impact)
Verb		Noun	

Types and quality of assessments (ACRL)/Examples

Types

- Formal
- Informal
- Traditional (test)
- Authentic (real life task)
- Integrated
- Knowledge/Content-based
- Formative
- Summative
- Self-Assessment (pre-and post)
- Peer
- Portfolio

Quality

- Collaborative
- Multi-dimensional
- Holistic
- Assess the thinking process
- Include critical thinking elements
- Managed

[Creating your assessments]

- Create a list of KSAs: What should learners know and be able to do?
- Identify standards that the learners need to meet
- Design some tasks that will illustrate whether learners have grasped concepts
- Determine what signifies “good” performance
- Develop rubrics to be used in grading and course redesign

Assessment models and samples

- TRAILS: Tool for Real-time Assessment of Information Literacy Skills (<http://www.trails-9.org/>)
- http://www.paccd.cc.ca.us/library/ilhandbook/il_assesform.htm
- <http://jonathan.mueller.faculty.noctrl.edu/toolbox/>
- <http://school.discoveryeducation.com/schrockguide/assess.html>
- iSkills from ETS
- Additional assessment resources (<http://www2.acs.ncsu.edu/UPA/assmt/resource.htm>)

Monitoring your performance as well

- Establish a tracking system to monitor both plan execution and impact
- For each scheduled milestone, compare the actual performance with the anticipated, and report results
- For all variances in scheduled performance...

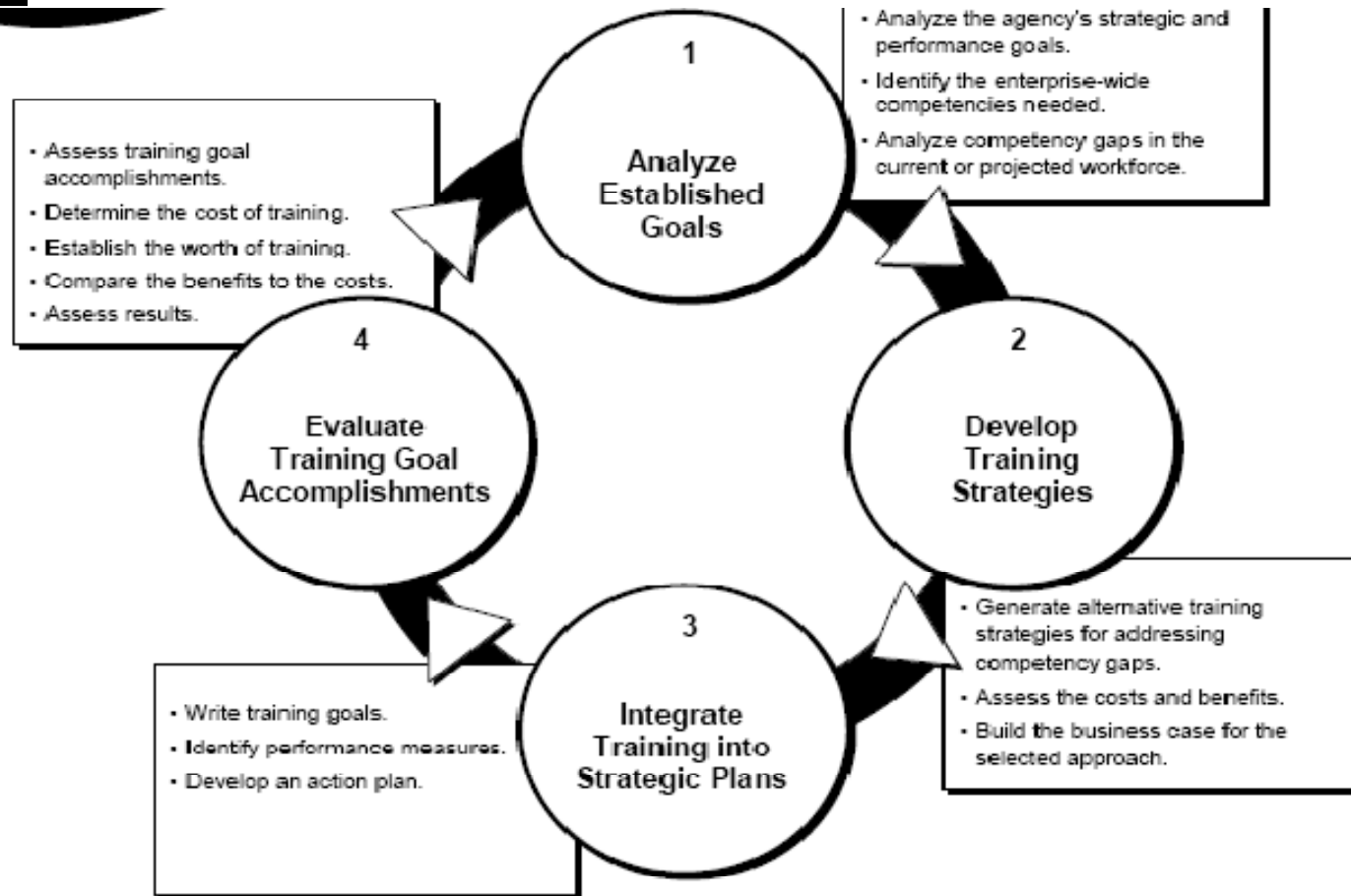
[Ask the following:]

1. How does the reported performance compare with the previous performance?
 - Benchmark the starting line
2. Is the performance/schedule variance likely to prevent goal achievement?
 - Particularly when the “stepped approach” has been used
3. Are external factors affecting performance? Which?
4. Is the variance due to unrealistic expectations (from planning stage)? What adjustments should be made?
5. What modifications should be made to the action plan?
6. What performance information should be collected *now*?

[Establishing the worth]

- Of training
- Subjective method for establishing the worth of improved performance (as a result of IL training)
- Comparing costs and benefits by calculating total *Return on Investment* (ROI)
- Assessing results

A more detailed illustration of the process



What you should have at the end of this session

- Model worksheets for creating action plans
- Ideas to use as the starting points for your IL training efforts
- Resources to consult
 - My bookmarks
 - How you can share yours