INSC 558: PLANNING AND ASSESSMENT

School of Information Sciences, The University of Tennessee, Knoxville
Fall 2022 Meetings: Wednesdays, 8:00-9:10 p.m. on ZOOM; additional weekly asynchronous 1:15

Faculty Contact Information
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A NOTE ABOUT FALL 2022:

Things aren't normal!
The past couple of years have been rough.
Some of us have lost work; some of us have lost loved ones or are profoundly worried about loved ones who might be vulnerable. Some of us are vulnerable! We are all experiencing stress, anxiety, and disruption.
All of this makes it more difficult to buckle down, focus, and produce quality work.

We'll get through it!
I will be as flexible as I can with deadlines and attendance this semester as long as you do your best to communicate with me.

I worry about my students when they're absent from class, miss a deadline, or leave my emails unanswered.
I know you are all diligent and hardworking; when you go “off-grid” I assume there's something wrong. Please do your best to let me know what's going on.

COURSE INFORMATION

Catalog Description
Overview of history of and issues related to planning and assessment in libraries and other information organizations, including approaches, methods, and tools.

Additional Information
This course will provide students with essential skills, regardless of professional placement.
This course will incorporate service, active, peer, and problem-based learning approaches.

Student Learning Outcomes
Students who complete this course will be capable of demonstrating awareness, knowledge, and/or understanding of...

• the history of library/information center assessment,
the planning and assessment cycle,
• common approaches to planning, including strategic planning;
• common assessment methods such as interviewing, observation, focus groups, usability testing, and data analysis, and
• planning and assessment tools, including Tableau, LibQUAL+, MINES, and MISO.

Required Texts
Additional suggested readings will be available through UTK's subscription electronic journals or on our class Canvas space in pdf format.

Recommended Texts
Style handbook of your choice (APA or Chicago Manual of Style).

COMMUNICATION

Email
I am required to communicate with you through your UTK email address. If you prefer to use another address, consult the OIT Helpdesk to obtain directions for forwarding your UTK mail to your preferred address if you don't wish to check both accounts.

Instructor Availability
Email is the most expedient way to get in touch with me. If I will be unable to check my email for a significant period of time (less than once/24-hour period) I will provide you with an alternative method of contacting me. It is tremendously helpful to me if you include our course number in the subject line of emails you send.

COMPUTING REQUIREMENTS AND RESOURCES

Requirements
You must have adequate computing skills, including but not limited to:
• Use of word processing software
• Use of Web browsers, e-mail, listservs, Canvas (including assignment submission process), and ZOOM

You must
• obtain a UTK email account
• subscribe to the SIS student listserv.
• have the PowerPoint Reader or the regular PowerPoint software installed on your computer to download the lecture notes from Canvas.

The Office of Information Technology (OIT) provides training classes in using varied technologies for students at no charge (advance registration is required).
Technical Support

Please review the SIS Technology Introduction website for help getting started with the tools you’ll need in the program: [https://sis.utk.edu/techintro/](https://sis.utk.edu/techintro/)

For assistance with technical and computing issues, contact the OIT HelpDesk by phone at (865) 974-9900, using the Contact Form, or at the Walk-in HelpDesk.

Course Resources

- Most lecture notes will be posted on Canvas before the class meeting for you to download.
- Note that lecture notes do not substitute for the assigned readings.
- Read the class announcements posted on Canvas to stay current with course matters.

### COURSE ATTENDANCE AND PARTICIPATION POLICIES

**Attendance and Participation**

Because the format of this class is 1:15 synchronous/1:15 asynchronous, I gauge participation and attendance a little differently.

*Asynchronous*: Students will complete the 1:15 asynchronous class segment by participating in a variety of independent and small group activities. These are not optional.

I will evaluate your participation for completeness, relevance, timeliness, and substance as part of your participation grade.

If extenuating circumstances such as illness prevent you from completing your asynchronous activities on time, please inform me as soon as possible.

If you are absent from our class meeting, I will still expect you to complete that week’s activity unless circumstances are sufficiently significant to prevent you from doing so.

*Synchronous*: I assume that each student will be present and participate in class. Missing multiple classes and/or failing to participate will lower your grade; frequent participation will raise the grade.

Regular attendance is required and necessary, and unexplained absences will affect your grade. Contact me as soon as possible if you cannot attend class. If you will be absent from class, you must:

- Inform me in advance or as soon as possible after class
- Submit any work due from the missed class period
- Listen to class recording
- Obtain notes, handouts, etc. from Canvas
- Check with classmates for notes, announcements, etc.
- Complete any assigned activity

*Acceptable reasons for absence from class include:*

- Illness
- Serious family emergencies

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1 See the “Note about Fall 2021” on p. 1
• Military obligation,
• Severe weather conditions,
• Religious holidays and
• Obligations for court imposed legal obligations (i.e., jury duty, subpoena)

Missing more than one class meeting for reasons other than those listed above will have a negative impact on your course participation grade.

**Inclement Weather**

“The University of Tennessee will remain open except in the most severe weather conditions. The Chancellor (or appointed representative) may officially close or suspend selected activities of the university because of extreme weather conditions. When a decision to close is reached, campus and local radio and TV stations will be notified and a UTAlert will be issued. The notice will also be posted on the front page at www.utk.edu...” SIS will cancel classes when UT is closed. Please check the SIS student listserv (UTKSI S-L@LISTSERV.UTK.EDU) for messages about closing.

If you face inclement weather conditions in your home location and attending class is impossible or unwise, please let me know when you are able.

**ADDITIONAL POLICIES AND POINTS OF INFORMATION**

**Disabilities that May Impede Learning**

The University of Tennessee, Knoxville, is committed to providing an inclusive learning environment for all students.

If you anticipate or experience a barrier in this course due to a chronic health condition, a learning, hearing, neurological, mental health, vision, physical, or other kind of disability, or a temporary injury, you are encouraged to contact Student Disability Services (SDS) at 865-974-6087 or sds@utk.edu.

An SDS Coordinator will meet with you to develop a plan to ensure you have equitable access to this course.

**If you are already registered with SDS, please contact your instructor to discuss implementing accommodations included in your course access letter.**

**Civility**

“In 2011, the university adopted the Principles of Civility and Community. They are designed to work in concert with all existing codes of conduct. The principles encourage all members of the campus community to foster a learning environment where the differences of our diverse culture are valued, respected and celebrated. Civility is an act of showing regard and respect for others including: politeness, consideration, tact, good manners, graciousness, cordiality, affability, amiability and courteousness...” (Hilltopics, p.10).

This statement applies to communicating with the instructor, classmates, and other members of the UT community.

**CCI Diversity Statement**

The College of Communication and Information recognizes that a college diverse in its people, curricula, scholarship, research, and creative activities expands opportunities for intellectual inquiry and engagement, helps students develop critical thinking skills, and prepares students for social and civic responsibilities. All members of the College benefit from diversity and the quality of learning, research, scholarship and creative activities is enhanced by a climate of inclusion, understanding and appreciation of differences and the full range of human experience. As a result, the College is committed to diversity and equal opportunity and it recognizes that it must represent the diversity inherent in American society. The College is acutely aware that
diversity and fairness are foundations that unite the College's faculty, staff, students, and the larger communication and information community.

**Instructor Status as a Title IX Mandatory Reporter**

University of Tennessee faculty are committed to supporting our students and upholding gender equity laws as outlined by Title IX. Please be aware that if you choose to confide in a faculty member regarding an issue of sexual misconduct, dating violence, or stalking, we are obligated to inform the University's Title IX Coordinator, who can assist you in connecting with all possible resources both on- and off-campus. If you would like to speak with someone confidentially, the Student Counseling Center (865-974-2196) and the Student Health Center (865-974-3135) are both confidential resources. For additional resources and information, visit [titleix.utk.edu](http://titleix.utk.edu).

Please note that my mandatory reporting responsibilities extends to incidents that occurred prior to this semester, even by several years. **By no means** do I want to discourage students from speaking with me about these or any other issues, but it's important that you are aware I may not be able to maintain confidentiality before you choose to speak with me.

**ASSIGNMENTS, ASSESSMENTS, AND EVALUATIONS**

**Academic Integrity**

Students should be familiar and maintain their *Academic Integrity* described in [https://hilltopics.utk.edu/academics/](https://hilltopics.utk.edu/academics/) as: “Study, preparation and presentation should involve at all times the student’s own work, unless it has been clearly specified that work is to be a team effort. Academic honesty requires that the student present his or her own work in all academic projects, including tests, papers, homework, and class presentation. When incorporating the work of other scholars and writers into a project, the student must accurately cite the source of that work.”

Students should abide by the *Honor Statement*:

“As a student of the University, I pledge that I will neither knowingly give nor receive any inappropriate assistance in academic work, thus affirming my own personal commitment to honor and integrity.”

**Plagiarism**

Plagiarism is a serious offense, subject to disciplinary action. (p. 26-7)

Attention to matters of documentation in all written work is expected and required. Inadvertence, alleged lack of understanding, or avowed ignorance of the various types of plagiarism are not acceptable excuses. Specific examples of plagiarism include, but are not limited to:

- Copying without proper documentation (quotations marks and a citation) written or spoken words, phrases, or sentences from any source;
- Summarizing without proper documentation (usually a citation) ideas from another source (unless such information is recognized as common knowledge);
- Borrowing facts, statistics, graphs, pictorial representations, or phrases without acknowledging the source (unless such information is recognized as common knowledge);
- Collaborating on a graded assignment without the instructor's approval;
- Submitting work, either in whole or in part, created by a professional service and used without attribution (e.g., paper, speech, bibliography, or photograph). (p. 26-7)
**Academic Dishonesty**

The UTK Student Code of Conduct (p. 27) identifies examples of academic dishonesty beyond plagiarism, including:

- providing or receiving unauthorized information during an examination or academic assignment, or the possession and/or use of unauthorized materials during an examination or academic assignment;
- providing or receiving unauthorized assistance in connection with laboratory work, field work, scholarship, or another academic assignment;
- falsifying, fabricating, or misrepresenting data, laboratory results, research results, citations, or other information in connection with an academic assignment;
- serving as, or enlisting the assistance of, a substitute for a student in the taking of an examination or the performance of an academic assignment;
- altering grades, answers, or marks in an effort to change the earned grade or credit;
- submitting without authorization the same assignment for credit in more than one (1) course;
- forging the signature of another or allowing forgery by another on any class or University-related document such as a class roll or drop/add sheet;
- gaining an objectively unfair academic advantage by failing to observe the expressed procedures or instructions relating to an exam or academic assignment; and (9) engaging in an activity that unfairly places another student at a disadvantage, such as taking, hiding, or altering resource material, or manipulating a grading system.

**Procedures for Addressing Academic Dishonesty**

The UTK Code of Student Conduct outlines the process for addressing instances of suspected academic dishonesty:

Sections 11.7 Academic Dishonesty Process, and 11.8 Academic Dishonesty—Resolution Through the Student Conduct Process (p. 27-8)

See also The University of Tennessee Graduate Council Appeal Procedure.

Students who may be unsure of the nature of plagiarism should consult the instructor or a guide for writing research reports.

UTK Libraries offer an extensive collection of resources related to responsible and ethical authorship: https://libguides.utk.edu/scholarlypublishing/plagiarism

**Incompletes**

Based on adopted University of Tennessee-Knoxville and SIS policy, a grade of I (Incomplete) is reserved for emergencies that prevent the student from completing the course on time. Incompletes are granted only under "the most unusual of circumstances" and solely at the discretion of the instructor (in other words, I may refuse a student's request for an incomplete). Plan your semester's course of study carefully to ensure sufficient time to complete the required work.

If a student disappears without contacting me, I will submit the grade as earned to that point.

**Assigning Grades**

Please note that I assign numeric rather than letter grades, but you can calculate a letter grade by dividing your score by the total points possible for the assignment, then referring to the scale below for the corresponding letter grade. For example, if you earned 23/25 points on an assignment, your percentage grade would be 92/100=A-.

Your final grade will be based on total points earned/100 possible points over the course of the semester.
### Evaluation

Semester grades will be assigned according to the following scale:

<table>
<thead>
<tr>
<th>Letter</th>
<th>Range</th>
<th>Points for GPA</th>
<th>Qualitative significance (performance)</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>93≤</td>
<td>4/hour</td>
<td>Superior</td>
</tr>
<tr>
<td>A-</td>
<td>90-92.99</td>
<td>3.7/hour</td>
<td>Intermediate (note: I would classify this as “very good”)</td>
</tr>
<tr>
<td>B+</td>
<td>88-89.99</td>
<td>3.5/hour</td>
<td>Better than satisfactory (“good”)</td>
</tr>
<tr>
<td>B</td>
<td>83-87.99</td>
<td>3/hour</td>
<td>Satisfactory</td>
</tr>
<tr>
<td>B-</td>
<td>80-82.99</td>
<td>2.7/hour</td>
<td>Intermediate (note: not sure why this is the same as A-)</td>
</tr>
<tr>
<td>C+</td>
<td>78-79.99</td>
<td>2.5/hour</td>
<td>Less than satisfactory</td>
</tr>
<tr>
<td>C</td>
<td>70-77.99</td>
<td>2/hour</td>
<td>Well below the standard expected of graduate students.</td>
</tr>
<tr>
<td>D</td>
<td>60-69.99</td>
<td>1/hour</td>
<td>Unsatisfactory performance and cannot be used to satisfy degree requirements.</td>
</tr>
<tr>
<td>F</td>
<td>59.99≥</td>
<td>0</td>
<td>Extremely unsatisfactory, cannot be used to satisfy degree requirements.</td>
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<tr>
<td>I</td>
<td>n/a</td>
<td></td>
<td>a temporary grade indicating that the student has performed satisfactorily in the course but, due to unforeseen circumstances, has been unable to finish all requirements.</td>
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<tr>
<td></td>
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<td></td>
<td>An I is not given to enable a student to do additional work to raise a deficient grade.</td>
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<td></td>
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<td>The instructor, in consultation with the student, decides the terms for the removal of the I, including the time limit for removal.</td>
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<td>If the I is not removed within one calendar year, the grade will be changed to an F.</td>
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<td>The course will not be counted in the cumulative grade point average until a final grade is assigned.</td>
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<td></td>
<td>No student may graduate with an I on the record.</td>
</tr>
<tr>
<td>W</td>
<td>n/a</td>
<td></td>
<td>indicates that the student officially withdrew from the course.</td>
</tr>
</tbody>
</table>

### Course Evaluation

You will be invited to evaluate the course at the end of the term. Please participate in this valuable process. I also invite your comments throughout the course and read all comments, suggestions, and recommendations.

### DISCLAIMER

*I reserve the right to make changes to the syllabus and schedule as the semester progresses, but I will never make a change that would have a negative impact on student grades, add to workload, or accelerate deadlines.*
Assignments

Let’s make a deal: if the work you submit reflects your best effort, I will put my best effort into reviewing and grading it. What do I mean?

The Student:

• Reviews the assignment as described and makes a good-faith effort to understand its parameters (note: if something is not spelled out explicitly in the assignment, it is open to your interpretation)
• Begins working with sufficient time to complete the assignment as required
• Cites references as required using the most recent iteration of Chicago (CMS) or American Psychological Association (APA) style (Purdue OWL is an incredible resource: https://owl.purdue.edu/)
• Finalizes the assignment before submitting, checking for typographical, citation, and other errors (and correcting them)
• Submits the assignment as close to the deadline as possible.

The Instructor:

• Provides a description of each assignment that includes requirements for success (note: if something is not spelled out explicitly in the assignment, it is open to your interpretation)
• Reviews assignments with an open mind and generous heart
• Uses grading criteria reflective of the assignment as described for students (i.e., not a standard in my head)
• Provides clear feedback, especially to explain why a grade is lower than a student might hope it would be (note: if an assignment is really great, I might not make a whole lot of comments on it. You can interpret “minimal comments” as “high praise” 😊)
• Returns graded assignments as quickly as possible. I tend to put a lot of time into grading—it’s important to me to be fair and thorough.

Preparation

• Unless otherwise stated, please submit assignments created using MS Word so I can use track changes and make comments easily (not so easy with pdfs).
• Please use either APA or CMS documentation styles for in-text citations and list of references/bibliography.
• Formatting assignments themselves per APA or CMS guidelines (e.g., headers, headings, etc.,) is not necessary.
• You must cite all sources, format and attribute all quotations correctly. Not doing so constitutes plagiarism.

Pre-submission Feedback

I am happy to look at a good draft of assignments prior to final submission. I will not pre-grade assignments, just provide general feedback and tips. These pre-submissions should be sent via email attachment (i.e., not Canvas) no later than one week prior to final due date.
Due Dates and Late Assignments

- Submit assignments to the corresponding Canvas assignment.
- Assignments are due (officially) at 11:59 p.m. Eastern on the due date listed on the syllabus.
- I will download the submissions from Canvas early the next morning.
- I will download the submissions from Canvas early the next morning.

If your assignment is not ready by the deadline...

- You must send me an email informing me that your assignment will be late.
- Submit your assignment using Canvas when it's ready.
- Assignments submitted after the deadline may incur a point-per-day penalty.
  - note: it's often better to take a bit more time with an assignment and take the late penalty than to turn in an assignment that's on time but incomplete, hasn't been proofread, etc.

MSIS Program Outcomes

It is our vision to provide a quality educational program, and for students to have the very best educational experience possible. By the end of their time in the MSIS program, each student should be able to:

1. Describe and discuss the processes of creation, organization, distribution, storage, access, retrieval, management, use, and preservation of information.
2. Describe and discuss the nature of leadership and management in the information professions and the importance of participation in the global information society.
3. Apply the general principles, values, and ethical standards of providing information services in a variety of settings and for diverse populations.
4. Comply with the changing responsibilities of the information professional in a culturally diverse and networked global society.
5. Identify critical professional issues in a variety of organizational, cultural, societal, disciplinary, transdisciplinary, and historical contexts.
6. Analyze and apply standards or policies related to the processes of creation, organization, distribution, storage, access, retrieval, management, use or preservation of information.
7. Explain the changing nature of information, information needs, and information behavior.
8. Assess and implement information technologies, systems, sources, and services that serve users effectively and efficiently.
9. Analyze research and apply it to information practice.

Assignments: Descriptions, Due Dates, and Program Outcomes for SLC

I recommend considering how you might fold the three primary assignments together. For example, the article you review for your HTDI(s) could serve as data points or exemplars for your Program Plan/Assessment justification, and you could utilize the tool you evaluate in your final project presentation.
Participation (n/a)

Much of the course material will be presented in the readings and discussions. You are expected to do the reading assigned for class and come to class prepared to offer your opinions and insights. To participate in class you must be present (physically/online and mentally).

This class meets synchronously for 1:15 weekly. On some weeks we will have an out-of-class activity to account for the additional hour of class time and contribute to your participation grade. These may be independent or small group activities; some require a discussion board post or verbal summary.

“How they did it; how they should’ve done it” (HTDI): Word Document (MSIS Outcome 9)

Due: 10/12 and/or 11/23

You may complete one or both HTDI’s.

Find a journal, book chapter, or conference paper (other formats subject to approval) that discusses findings from an effort to assess the effectiveness of a program, service, resource, etc.

Summarize the program/service/resource under question and the assessment described. See “Evidence Summaries” in Evidence Based Librarianship in Practice (EBLIP) for examples.

Evaluate the assessment effort(s) the authors describe. Consider the following:

• Do you believe the assessment approach(es) described is/are effective for measuring the impact of the program, service, resource, etc., being evaluated? Why or why not?

• How else might the authors have assessed the program, etc., of interest? Even if you agree with the approach described, try to think of an alternative approach.

• Consider the authors’ conclusions from the data their assessment generated. Do you agree with them? Do you think the data as presented supports their conclusions? Why or why not?

Each HTDI should be at least 400 words.

Planning and Assessment Tool Evaluation: mp4 recording (6, 8)

Due: rolling, between 10/19 and 11/16

There are many, many tools available to support efforts at planning and assessment in a variety of settings. Please choose a tool from the list provided to test, analyze, and describe for your classmates.

Consider:

• For what purposes was the tool created? Can you think of any supplementary or “off-book” applications?

• What are the tool’s strengths and weaknesses? Demonstrate when possible.

• How could the tool be employed in planning/assessment-related efforts?

Record your analysis in a 7-10 minute long visual presentation using ZOOM, Camtasia, or other Screencasting software.

You will post your mp4, then view and comment on classmates’ presentations, and engage with commenters.

Project Plan and Assessment (3, 8)

Due dates:

Written: 12/7

Live presentations: 11/30 and 12/7

Recorded presentations: 11/18 (Friday)
There are two options for completing this assignment:

1. Group Option (note: If you choose the group option, please try and assemble your own group. I will help if needed):
   - Group Agreement (Due 10/5)
     Your group will need to create a group agreement (templates and examples available in Canvas) outlining the group’s expectations and processes for completing and submitting work. This is not a graded assignment in that if your group’s agreement displays evidence of an appropriate amount of effort, it will receive full credit.
   - Program Plan and Assessment
   - Live or Recorded Presentation

2. Individual Option
   - Program Plan and Assessment
   - Recorded* Presentation

**Description**

Develop a plan to create, implement, and assess the eventual effectiveness of an initiative (new or revamped program, collection, or service) in the library or information center setting of your choice.

Your written submission and presentation should include the following:

**Part I: Program Plan (including description of need)**

- A needs assessment:
  - What problem is your program designed to address?
  - What evidence do you have of the problem? You may invent data/data sources to bolster your argument, but they should be based in reality.
  - Why do you think your program can help to address it?

- A description of the new/revamped service/resource (what will be provided, by whom, when, for how long, etc.)
  - Why have you chosen this approach? Include evidence from literature, interviews, existing services that your new service will complement.
  - How does it relate to the larger plans, mission, vision, etc., of the parent organization?
  - a SWOT Analysis

- A detailed description of the monetary and other costs associated with implementing your plan [see footnote 1]

- A timeline for implementation

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1. Please note: I understand that some of data used in the plan and presentation, such as that used to establish need and “findings” from the eventual assessment will be fabricated. This is fine...however, please try to fabricate data that is somewhat realistic. For example, if you are proposing a program to support adult literacy development in your library's (imaginary) community, try to find literacy rates for a community of similar size, geographic location, etc., to your imaginary city. Similarly, your assessment should not indicate a 500% increase in adult literacy as a result of your program. Review the LIS literature for findings from assessments of similar programs and make an educated estimate. I am looking for a good-faith effort, but don't twist yourselves into knots.
• Expected benefits of implementation

Part II: Program Assessment

Develop a plan for assessing the effectiveness of your program.

• You should include at least two individual “studies” in your plan, e.g., a survey AND a usability study, or reviewing circulation data AND interviewing patrons.

Describe the following:

• What data will you use to establish a “baseline” for your program? In order to assess effectiveness you need to establish a starting point.

• What approaches you will use to assess the effectiveness of your program?
  ▪ What changes do you expect to see?
  ▪ How can/will you measure them?
  ▪ Why are these approaches the best or most effective way to assess the effectiveness of your program? Cite sources.

Part III: Presentation (live or recorded)

You’ve planned, created, implemented, and assessed the effectiveness of your program! Well done. Now, it’s time to make a presentation about your success to a stakeholder group! Your presentation should...

• ...be structured as if you were making it to a stakeholder group that would have a realistic interest in your program.
  ▪ These can be internal or external stakeholders and should be identified in the presentation.
• ...include at least two visual representations of data (from the plan or from the assessment findings), e.g., charts, graphs, etc.
  ▪ These needn’t be fancy—the visualization tools in PowerPoint are sufficient.

...and describe...

• The need (and how you established it)
• The rationale for designing the program/service/resource to address the need, including why you believed this approach would be effective
• Implementation of the program
• A summary of your assessment of the program’s effectiveness (this will be fabricated but should be somewhat realistic—see footnote 1)

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