

# EVALUATION PLANNING GUIDE FOR LIBRARY DEVELOPMENT PROJECTS/SERVICES

## SECTION ONE: REASONS FOR THIS GUIDE

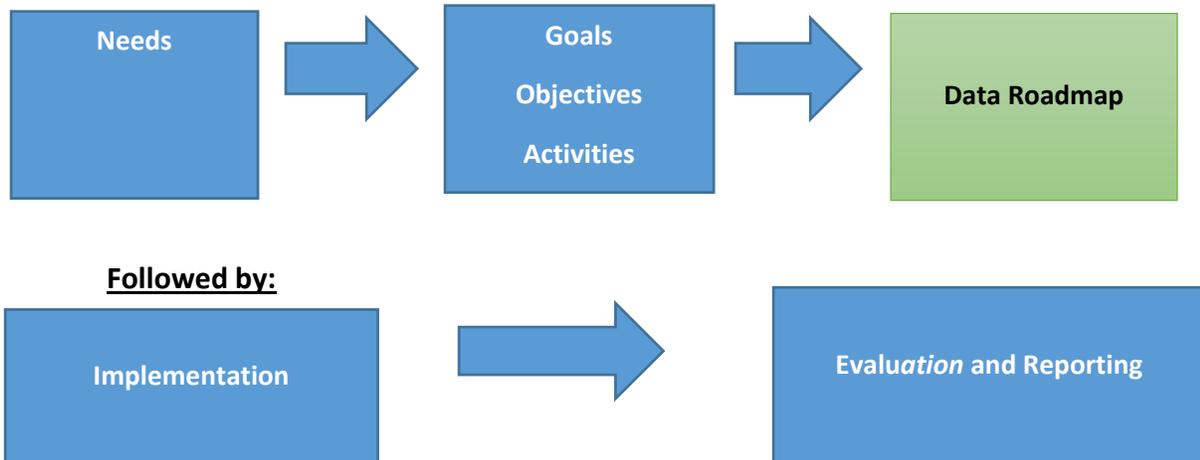
- A consistent approach to planning for evaluation and reporting is established for each project/service
- There is standard use of the “data road map” approach and understanding of its “data trifecta”
- We are prepared for changing reporting needs
- We improve the way MSL and Montana libraries tell their stories
- Our training planning for projects/services reflects evaluation results and is needs based
- We continually learn other things than we may have expected in our initial project/service planning
- We are better equipped to create return on investment stories about our projects/services
- Staff is able to utilize a standardized approach to evaluation
- Our evaluation efforts can effectively inform funding decisions
- The collecting of user stories for regular reports becomes more routine
- Staff are trained in the use of Google Analytics and other web analysis tools
- Coordinating different reporting needs will be addressed in a single evaluation approach, reducing the amount of time spent writing and organizing reports

## SECTION TWO: CREATING A DATA ROAD MAP

- A “data road map” should be created for each new or ongoing project/service. For new projects, the creation of a data road map should happen as part of the initial planning process.
- Data you will collect should focus on the “data trifecta”. The data trifecta consists of identified *inputs, outputs and outcomes*.

- Inputs, outputs and outcomes can be external (non-MSL) and internal (MSL). Both need to be considered as part of evaluating a project or service.
- Data collected should demonstrate, *quantitatively and qualitatively*, whether or not anticipated outcomes are being met and whether or not the outcomes address the identified needs.

RIPL’s suggested outcome based evaluation process that includes the creation of a data roadmap is presented visually below:



Use the “data trifecta” to create your data road map. There are 3 necessary types of data: inputs, outputs, and outcomes.

**INPUTS:** These are the resources that are used to produce or develop a program or service. Inputs include funding, staffing, equipment, supplies, and essentially anything used to create the program or service.

**These are the inputs we should each consistently collect for every project or service (you may have many additional inputs for your project/service):**

- Number of work hours spent in planning meetings or preparing for a training
- Number of work hours spent planning and implementing a project or service
- Funding available
- Software/storage if applicable
- Equipment if applicable
- Supplies
- Training

**OUTPUTS:** Outputs are produced as a result of using the inputs to create or develop the program or service. Outputs include the creation of a training module or program, a report, the number of programs held, number of program attendees, or number of items loaned. Outputs are typically tangibles; they're quantitative and can be used to determine value from an operational perspective. Although most libraries report outputs to their stakeholders, these outputs show activities, not value or impact.

Outputs help us prove things. There are connections between outputs and outcomes, but they are not the same.

**These are the outputs we should each consistently collect for every project or service (you may have many additional outputs for your project/service):**

- Number of attendees at trainings
- Number of training sessions (online and in person)
- How many training hours/minutes available to the audience
- Number of consultations (consulting, MSC system type support, “reference transactions”)
- Number of outreach efforts made to potential contributors of content (MMP) or to new MSC members, new Courier participants, other outreach
- Number of new collections/records/items/patrons (MMP, MSC, MTLibrary 2Go)
- Amount of created content
- Analytics related to patrons (patron location, patterns of use, usage for what purpose, number of website visits)
- System support ticket tracking (MSC, MontanaLibrary2Go, MMP)
- Number of interactions with social media posts (likes, reach, comments, shares, other)
- Number of hours we spend on evaluation of the project/service
- Number of miles travelled

**OUTCOMES:** Outcomes are the change from the perspective of the individuals who have participated in the program/service. Outcomes, from the participants' perspective, include new or deeper skills, know-how, a change in behavior or attitude, or a change in status.

Don't be afraid to plan for outcomes that you cannot measure, just make sure you have an outcome or a few outcomes that you CAN measure.

You will likely need to capture outcomes along the way. It may be that several SLR-LD staff are involved in capturing outcomes for a single project/service. You can share this task through our OneNote Notebook environments.

There are likely longer term outcomes for most of our projects and services. Many of the efforts we are involved in have the component of laying groundwork for the future. Tracking progress toward longer term goals is just as essential as collecting more immediate outcomes.

**Outcomes are probably the most unique in the data trifecta. They differ for each project or service. Some general guidelines that will help you create statements about anticipated outcomes include:**

- How will Montana librarians, trustees, library patrons and/or Montana citizens increase their knowledge, skills, attitudes or behaviors as a result of the project or service?
- How will using resources like MontanaLibrary2Go, our statewide databases, the Montana Shared Catalog or the Montana Memory Project benefit or impact the end user?
- What are the lessons you want to learn from the project or service?
- Do you anticipate changes in the project or service along the way?

You may also discover that there are previously unidentified, unexpected outcomes—that's to be expected.

### SECTION THREE: RESOURCES TO USE WHEN CREATING YOUR DATA ROAD MAP:

These resources are essential when creating your data road map to ensure the project/service meets the goals of MSL:

- The 2016 Library Development Study Task Force recommendations
- Benchmarks created by the Network Advisory Council that relate to your project/service
- MSL current Five Year LSTA Plan
- MSL Long Range Strategic Plan 2010-2020
- SLR-LD current fiscal year work plan
- Your own current fiscal year work plan

What audience will you need to report to for the project? This is also something to consider as you build your initial data roadmap, thinking about the outputs and outcomes you want to track. Audiences to consider include:

- Institute of Museum of Library Services (IMLS)
- Montana legislators
- Montana library community, including trustees
- Network Advisory Council
- Montana State Library Commission
- Executive boards or advisory councils related to your project
- Project members, contributors, participants or enrollees

#### SECTION FOUR: STORING YOUR EVALUATION DATA

Evaluation data, including the project data road map and any documented findings or evaluation tools, should be stored in a tab or page within the project notebook on the SLR drive where it can be accessed and understood by others on staff.

#### SECTION FIVE: ONGOING EVALUTION

Regular, recurring evaluation of your project or service is necessary to insure you are meeting your data road map. Regular evaluation also ensures that you change course in the middle of a project/service if needed.

Questions to ask yourself include:

- Are you gathering the data that's needed to meet the outputs identified in the project's data road map?
- Are you staying on your project timeline?
- Are you seeing unanticipated outcomes that would cause you to change the direction of the project/service?
- Are you keeping within your approved budget?