I. Teaching *Shaping Outcomes*

Getting Started as an Instructor

The best way to prepare for teaching *Shaping Outcomes* is to work through the tutorial yourself beforehand, using the practice scenario examples: library examples OR museum examples, depending upon your expertise and professional environment.

Some instructors / facilitators work through the program as though they are a participant, creating their own programs and completing all of the exercises in each learning Module.

To help instructors AND participants get started, *Shaping Outcomes* includes several useful tools:

Tutorial orientation
http://www.shapingoutcomes.org/course/orientation/index.htm

- Everything you need to know about how the tutorial works!
- This orientation provides details about the tutorial's design, layout, menu options, navigation buttons, museum examples, library examples, and more.

Logic Model
http://www.shapingoutcomes.org/course/model/index.htm

- Logic models visually represent or diagram a program.
- A logic model shows program planning details, and the relationships between audience need, program activities, expected outcomes or results, and how those results will be evaluated.
- A sample logic model is included in the tutorial to show what a complete program design looks like.

Case Studies for libraries OR museums
http://www.shapingoutcomes.org/course/cases/index.htm

- Library and museum case studies include examples of **real** outcomes-based programs.

- Cases are attached to the tutorial as PDF files. Cases are referred to as 'small', 'medium' or 'large' depending on the size of the lead institution in the case study program.

- Learners can decide whether their own organization best matches the 'small', 'medium', or 'large' examples, and then use those that fit best.

- Attached to the case studies are materials about the case organization such as evaluation studies, grant proposals, reports and other materials.

- You can use these to generate discussion among class participants and to help learners better understand how OPBE is applied in-context.

Glossary
http://www.shapingoutcomes.org/course/glossary/index.htm

- Includes definitions and descriptions of key terminology and concepts in OBPE. Also includes examples of how terms might be seen in other disciplines or contexts.

Use the tools above to introduce yourself to the *Shaping Outcomes* tutorial and OBPE process. Also pass these resources along to participants in your session!

[See the Appendices Table of Contents for a detailed list of handouts, help guides and a variety of useful resources.]

Technology/Computing Requirements and Course Resources

Shaping Outcomes is an **online** course, so all you need are a standard Internet connection, Web access, and the URLs (Web addresses) of course resources:

1. Internet connection
   We recommend that you have a high-speed or broadband or Ethernet connection to the Web (not dial-up)

2. Web browser software
   We recommend later versions of any one of these:

   Internet Explorer
   http://www.microsoft.com/windows/ie/
   [Click on 'Downloads']

   Firefox
   http://www.mozilla.com/firefox/
   [Click on 'Download Firefox']

   Netscape
   http://browser.netscape.com/ns8/
   [Click on 'Free Download']

3. Adobe Acrobat for reading PDF files.
   Download free-of-charge from:
   http://www.AdobeAdobe.com/products/acrobat/readstep2.html
   [Click on the **red** 'Download' button]

   Be sure that your mouse, printer, and other equipment are in good working order. Update old software or old operating systems so that you can make the best and fastest use of the Web.

Using these settings will make your *Shaping Outcomes* experience more enjoyable:

Operating System	Windows XP or newer; Mac OSX or newer
Screen Display / Monitor Resolution *	1024x768 optimal; 800x600 acceptable
Color *	16-bit (thousands) color or higher bit depth
JavaScript *	Set to enable
Pop-ups *	Set to allow
Cookies	Set to enable

URLs for Course Resources

***Shaping Outcomes* Course Start Page**	**http://www.shapingoutcomes.org/course**
Course Orientation	http://www.shapingoutcomes.org/course/orientation
Shaping Outcomes Technical Requirements and Help	http://www.shapingoutcomes.org/course/orientation/#5
Wiki site	http://www.shapingoutcomes.wikidot.com
Wiki Help	http://www.wikidot.com/doc
About *Shaping Outcomes*	http://www.shapingoutcomes.org/ OR send e-mail to outcomes@iupui.edu

Instructor's Responsibilities

Shaping Outcomes instructors are responsible for managing a course session. Enrollment and evaluation activities will be conducted by *Shaping Outcomes* program staff.

Shaping Outcomes is designed to be flexible -- it can be offered as a one-time 3-hour session, or run over a full day. Sessions can also run from one to six weeks.

Instructors who are **teaching Shaping Outcomes as part of a university course** can decide how long they want their S.O. session to last; and can pick-and-choose from among the modules and activities.

Instructors who are **teaching Shaping Outcomes for the IMLS** may be given a session with a set date. In other cases, the instructor may be able to decide on the length of the course.

> Instructors who are librarians or experts in LIS are paired with learners from LIS environments. Instructor who are museum professionals are paired with participants who are museum professionals.
>
> Participants may be located anywhere across the country! Some learners enroll individually. In other cases, organizations will send 2 - 4 people to 'training', so you will have multiple people from one organization enrolled in class. They may want to develop a program jointly in a small team.

In order to effectively manage the course, instructors need to engage in the following activities:

- Be sure that participants know how to contact you. Send a welcome greeting once you've received a list of participants.
  [A sample welcome is in APPENDICES.]
- Monitor (and keep updated) the wiki discussion forums; post new assignments or announcements as necessary.
- Read and respond to postings a couple of times each week. Get in touch with participants who may have 'strayed'.
- Encourage course attendees to participate actively in all discussions and activities.
- Provide regular (set due dates) and prompt feedback on logic models.
  [Helpful logic model scoring rubrics are in APPENDICES.]

The *Shaping Outcomes* tutorial was created as part of an IMLS grant, and is actively evaluated. Learners and instructors may be asked to respond to a self-quiz, or tutorial or course evaluation surveys.

Responsibilities and Time Commitments of *Shaping Outcomes* Instructors

The *Shaping Outcomes* Course

- The course can be run in a variety of formats (3-hours, one-day, 1-6 weeks).
- It is self-paced for the participants.
- There are usually no more than15 participants per course.

Time required of the Instructor

- There will be about two to five hours of prep time that the instructor must allow him/herself in order to review modules, the tutorial orientation, and the Instructor's Manual.
- The instructor should allow, on average, about an hour and a half per student for feedback and correspondence. The instructor can set up his/her own time schedule for
- On occasion, once the course is complete, some instructors may be asked to fill out an instructor's survey. This takes, on average, about a half an hour to complete.

Instructor's Time Requirements

Before the course, an instructor should expect to spend about two to four hours of prep time. During this time, an instructor will need to:

1. Review the Tutorial Orientation
2. Review the Wiki
3. Review Modules A - E
4. Become familiar with logic models
5. Become familiar with handouts, help guides [See APPENDICES (table of contents)].

Once the session has begun, instructors typically spend a total of two hours per participant providing individual feedback and commenting on logic model drafts.

We also estimate an additional one hour a week to provide general feedback and technical support for the entire group. An instructor's technical knowledge, teaching experience, and the size of the class may shorten or lengthen the time they can expect to spend on the course.

Participant Time Requirements

It is helpful for instructors to layout these time requirements with students, encouraging them to pace themselves and manage their time each week so that one Module can be completed and absorbed before moving onto the next:

Before the course, participants should expect to spend about two to four hours of prep time. During this time, participants will need to:

1. Be sure their computers are ready.
2. Review the Tutorial Orientation
3. Access and begin working in the wiki
4. Access and begin tutorial Modules A - E
5. Access and begin completing logic model worksheet

During the session, participants should expect to spend approximately one- two hours per week on tutorial-related activities (tutorial modules, completing logic models, communicating in the wiki, etc.), but activities can be restricted to shorten time requirements.

Participants can also expect to invest three to five hours (total) in completing their logic models.

Participants can work together in small teams during class, or use the tutorial independently or in teams outside of class.

Embedding *Shaping Outcomes* in a University Course

Shaping Outcomes is a useful tool for faculty to include in their own university courses. OBPE is used by many funding agencies; so having participating in Shaping Outcomes and understanding the OBPE process is a useful credential.

The tutorial teaches skills that can be applied in multiple contexts to:

-- Evaluate grant programs
-- Plan new services or activities
-- Develop or manage complex programs

The simulations and case studies in the tutorial are focused on libraries and museums, however, OBPE methods are used in many other disciplines as well.

The tutorial is organized into five Modules:

Tutorial Module A: Overview
Tutorial Module B: Plan
Tutorial Module C: Build
Tutorial Module D: Evaluate
Tutorial Module E: Report

How Long Will the *Shaping Outcomes* Course Last?

Faculty can decide whether how to organize the course. Shaping Outcomes is highly flexible, and can be taught in a variety of ways:

- one-time, three hour workshop
- one-time, one day session
- one week up to six week sessions

Shaping Outcomes is designed to be flexible – each of the tutorial's five Modules is generally designed to stand-alone as well as fit together as a whole. Faculty can run an entire five-week course (one Module per week), or pick and choose from among the five Modules or content areas to create a specialized training opportunity for students.

Faculty can modify tutorial-related activities or assignments to shorten time requirements. For example, when *Shaping Outcomes* has been taught to museum studies or library students as an embedded tutorial within an academic course, it has been taught in as little as seven to 10 days (in a condensed summer session) and for as long as five weeks in a regular 15 week academic semester.

Not only is the time frame flexible, but the course can be customized by an instructor with special assignments, discussion forums, or other learning experiences posted on the course management software.

Activities for enhancing learning, deepening engagement, and community-building are included as well. Use these to generate activities and discussions: "Check Your Understanding" and "Apply Your Understanding" exercises introduce the *Children's Museum of Indianapolis* (museum) scenario and the *Whitney Library Information Commons* (library) scenario.

Depending on the length of the session that you are teaching, you can make use of the "Check Your Understanding" and "Apply Your Understanding" exercises or the "Coach" or "Dig Deeper" activities, assigning required or optional exercises requiring students to work-through these scenarios.

Teaching *Shaping Outcomes* as a Stand-Alone Workshop

Enrollment

Instructors who have contracted with the IMLS or IUPUI to teach *Shaping Outcomes* as a stand-alone workshop will be provided with a list of participants. Participant enrollment and evaluation activities are handled by *Shaping Outcomes* administrative staff members who contact students via e-mail with registration details and basic introductory materials.

Enrollment is generally limited to a maximum of 12 to 15 participants.

A list of students, including their contact information, will be e-mailed to you at least one week before Module A is scheduled to begin.

Making Contact with Participants

About one week before your workshop is scheduled to begin, our program staff will e-mail to you an enrollment list for your session. The enrollment list includes the names, institutions, and electronic mail addresses of session participants.

You can then contact participants with a greeting, and provide them with details for accessing the wiki and the S.O. tutorial. [Sample 'hello and welcome' materials are in APPENDICES.]

Communicating Effectively and Creating an Online Community

One of the most important roles of an instructor is to orchestrate learning:

- Provide feedback to participants
- Keep track of their progress
- Encourage participants to communicate with you as the instructor and with colleagues via the wiki discussion forums.

Creating an online 'community-of-learning' is an important goal of the *Shaping Outcomes* course!

Doing an online course can be isolating and boring when people are working alone, but when there are opportunities for interaction and discussion, participants get to know one another and are more engaged in the course.

We find that encouraging participants to greet one another and talk about their projects creates a community of happy learners. To this end, we use the wiki to provide a forum for group discussions and communication.

In order to promote communication among participants, instructors should encourage them to make use of the weekly discussion forums. Discussion forums can be established to facilitate conversation on a variety of topics:

- Discuss the various programs, and their similarities and differences
- List and discuss stakeholders (as opposed to audience members or partners)
- Talk about the differences between outputs and outcomes
- Discuss the solutions statement and audience needs
- Share program inputs and outputs, activities and services

Instructors can use tutorial resources such as the glossary, case studies, and the sample logic model to encourage active involvement or to generate discussion.

It's helpful if instructors refer participants to specific resources, encouraging them to make use of these and talk about them in the weekly discussion forums.

The tutorial asks participants to submit draft logic models to their instructor. You then review the logic models, and provide constructive and detailed feedback to advance the participants' progress.

The instructor decides beforehand whether she/he wants to receive drafts through the wiki or private e-mail, then communicates that preference to participants!

Instructors should also be available during dates / times that are mutually agreed upon by you and course participants. For example, if you only want to read e-mails or talk with participants on weekdays, you can let participants know early-on when you welcome them to the course, then remind them again later.

[See APPENDICES for materials that help instructors review logic models.]

- Instructors should inform students that EITHER "library" OR "museum" examples should be used, but not both.

- Programs that are appropriate for *Shaping Outcomes* should have several characteristics:

  - The program should be <u>discrete</u>, meaning that it has to have a beginning and an end.
  - The program should be <u>special</u>, in that it is unique and not already part of the ordinary business of your organization.
  - The program should be <u>audience-oriented</u>, meaning that it has to make a difference or have an impact for some persons, somewhere.

- *Shaping Outcomes* participants should get early approval for their program/program ideas.

- Participants will have questions and comments for you -- the instructor -- so you will want to respond to e-mails within a time that is communicated and mutually agreed upon by the instructor and students. (Within 12 hours of receipt, for example; or at 9:00 am and 4:00 pm daily, for example.)

- Research shows that interactivity is important for student/participant success and satisfaction. Instructors and students should complete their personal profiles in the wiki, and take time to read one another's profiles. Instructors can post discussion topics in the wiki's discussion forums to generate conversation among course participants.

- Instructors may want to consider scheduling regular synchronous learning times for Q & A or get-togethers.

- When teaching *Shaping Outcomes* as an embedded tutorial, the instructor's overarching course and content drive the curricula. Try to work in discussion forum postings and responses that focus on some aspect of *Shaping Outcomes*.

- In some case, *Shaping Outcomes* instructors will be working with practitioners in the museum or library fields.

  These individuals may not have self-selected for the course.

  In addition, practitioners may feel insecure with basic technology skills or uncomfortable with online interaction. They may be working with colleagues as a team, yet experience difficulty working collaboratively. They may not feel comfortable asking for help, or may want to limit the time and effort they expend for the course. Keep participants' concerns, issues, and priorities in mind so that you are better prepared to respond to their needs.

- Instructors should encourage students them to pace themselves and manage their time each week so that one Module can be completed and absorbed before moving onto the next.

- Teaching and learning in an online environment demands some different unique and attributes from traditional face-to-face courses. Effective instruction and learning requires:
  - Competence in basic technology skills
  - Comfort with online interaction
  - Willingness to accommodate participants' individual differences
  - Skill at planning ahead, but
  - Flexibility in making changes
  - Willingness to invest time and preparation in teaching.

- People who have not experienced online teaching and learning sometimes think that this format is less time consuming, not as rigorous as, or less personal than face-to-face instruction. If you have been an instructor or a student in an online environment, you know that these assumptions are not always correct. Effective online teaching and learning is time-intensive, demanding, and rewarding for both instructors and participants.

- Online communication can seem cold and curt. Emphasize your good will through emoticons (☺ = colon plus hyphen plus right/closing parenthesis).

  Some instructors try to be much more cheerful and positive than they would in a traditional classroom -- dropping in slogans like "Keep on keeping on!" or "Onward and upward!" Instructors have to choose an online persona that fits them AND those taking the course.

- Additional help guides for engaging online learners are available from the IUPUI Office of Professional Development:

  Tips for Getting Students to Prepare for Class
  http://www.opd.iupui.edu/uploads/library/IDD/IDD8779.doc

  Tips for Successful Group Work
  http://www.opd.iupui.edu/uploads/library/IDD/IDD597.doc

  Using Icebreaker Activities
  http://www.opd.iupui.edu/uploads/library/IDD/IDD4638.doc

  Tips for Giving Peer Feedback in Online Discussion Forums
  http://www.opd.iupui.edu/uploads/library/IT/IT5446.doc

  Chat Room Activities
  http://www.opd.iupui.edu/uploads/library/IT/IT157.doc

  Links to articles on Teaching and Learning
  < http://www.opd.iupui.edu/uploads/library/IDD/IDD4133.htm

How Long will the *Shaping Outcomes* Course Last?

Instructors may be given a session that is already designated at a particular length (6-weeks, 4-weeks), or instructors may be able to decide how long their course sessions will run.

Instructors can then modify or pick-and-choose from among tutorial-related activities or assignments, and adapt these to time requirements.

Use these to generate activities and discussions: "Check Your Understanding" and "Apply Your Understanding" exercises introduce the *Children's Museum of Indianapolis* (museum) scenario and the *Whitney Library Information Commons* (library) scenario.

Depending on the length of the session that you are teaching, you can make use of the "Check Your Understanding" and "Apply Your Understanding" exercises or the "Coach" `or "Dig Deeper" activities, assigning required or optional exercises requiring students to work-through these scenarios.

Suggestions for Structuring the Course Over Time

- One-time, three-hour session or a one-day session:
  Participants complete Module A before the course begins.
  They then work through the key features of Modules B, C, D, and work on their logic model during the session.

- One-week session:
  Participants complete one module each day, with the first draft of the logic model submitted for review on Wednesday or Thursday. The logic model is finished by the end of the week.

- Three-week session:
  Participants complete Modules A and B in week one; Modules C and D in week two; Module E in week three. The logic model is begun in week one, with drafts submitted for review at least two times. The final logic model is completed by the end of week three.

- Four-week session:
  Participants complete Module A in week one; Module B in week 2; Modules C and D in week three; Module E in week four. The logic model is started during week 2, with drafts submitted for review at the ends of weeks two and three. The final logic model is completed by the end of week four.

- Five-week session:
  Participants complete one module each week for five weeks. The logic model is started during week 2, with partial drafts submitted for review at the ends of weeks two, three, four. The final logic model is completed by the end of week five.

- Six-week session:
  Participants complete one module each week for five weeks. The logic model is started during week 2, with partial drafts submitted for review at the ends of weeks two, three, four, and five. The final logic model is completed by the end of week six.

Instructors can also pick and choose from among the Modules.

Tips and Considerations for Teaching with Logic Models

- *Shaping Outcomes* participants sometimes have difficulty moving into the OBPE mindset. Share these tips with class members and use them generating conversation.

- Encourage participants to become familiar early-on with the terminology associated with OBPE: outputs, outcomes, target audience, indicators, stakeholders, benefits, and so on.

- Distinguish between a "stakeholder" and a "target audience member": Outcomes must be spelled out and measured for target audience members. Thus, unless you are going to discuss the teacher or parent outcomes, you might want to just leave them in the "stakeholder" section.

- Another consideration for target audience: Privacy

  Keep in mind when developing a program that gathering data about minors is usually more cumbersome than about adults. Also keep in mind that honesty in reporting is an issue for minors (reporting about smoking or sexual activity, for example). Spell out how you will try to get valid data (honest answers) and also preserve privacy.

- Make sure that the proposed **solutions** address real **needs**. For example, if an outcome is to improve speaking skills for mentors, then "Mentors' speaking skills are improved," can be listed as an audience need and a potential outcome of the program.

- Part of the process of refining and checking a logic model is to ensure that all the parts "match" -- not only that all parts need to be present and accurate (e.g. activities vs. services), but that good matches exist between needs, solutions, outcomes, measures, etc.

[Sample logic models and helpful tips to pass along to participants are available in APPENDICES.]

J. About *Shaping Outcomes:* Background and Contacts

The *Shaping Outcomes* tutorial is a product of a three-year grant funded by the Institute for Museum and Library Services (IMLS), an agency of the U.S. federal government, to the faculty of the Indiana University School of Library & Information Science at Indianapolis (SLIS) and the Indiana University School of Museum Studies.

Shaping Outcomes is an online course designed for professionals in libraries and museums who want to improve their abilities to plan and manage grants, programs, and programs using the outcomes-based planning and evaluation (*OBPE*) or outcomes-based evaluation (*OBPE*) methods. These methods will strengthen an organization's grant proposals to the IMLS and other funding agencies, as well as help make their programs more successful based on concrete, recognizable goals!

More details about the *Shaping Outcomes* Project are available at:
http://www.shapingoutcomes.org/about.htm

Shaping Outcomes Project:	http://www.shapingoutcomes.org
E-mail to:	outcomes@iupui.edu

The Institute for Museum and Library Services (IMLS)

The Institute for Museum and Library Services (IMLS) is a federal agency that fosters leadership, innovation, and a lifetime of learning through grants to museums and libraries.

IMLS supports and encourages its grantees to conduct outcome-based planning and evaluation (OBPE). OBPE *is* an effective and efficient way for programs to capture critically important information and to persuasively tell their stories.

The IMLS currently offers courses in OBPE for IMLS-funded programs to each new National Leadership Grantee and to each State Library Administrative Agency.

IMLS OBPE initiative:	202-606-5551 or kmotylewski@imls.gov
IMLS:	http://www.imls.gov/

Indiana University School of Library and Information Science at Indianapolis

The Indiana University School of Library and Information Science-Indianapolis (SLIS), located on the IUPUI campus in downtown Indianapolis, Indiana, is one of the nation's top ranking ALA-accredited programs, offering the Master of Library Science degree (MLS).

SLIS provides multiple learning paths into a wide range of information-based professions, challenging its students to pursue their professional interests, and preparing graduates for rewarding careers in contemporary society.

SLIS:	http://www.slis.iupui.edu
Shaping Outcomes Contacts:	Dr. Rachel Applegate, rapplega@iupui.edu
	Dr. Katherine Schilling, katschil@iupui.edu

The Indiana University School of Liberal Arts Museum Studies Program

The Indiana University School of Liberal Arts offers the Museum Studies Program on its urban IUPUI campus, making available both undergraduate and graduate certificates and a master's degree in Museum Studies.

The Museum Studies Program has developed collaborative relationships with area museums and an extensive network of adjunct faculty and guest lecturers who bring state of the art museum practice to the curriculum.

The integral role of museum professionals in the Museum Studies curriculum fosters a critical, reflective, and scholarly discourse on museums that is applied to current practices and issues in the field.

Museum Studies Program:	http://liberalarts.iupui.edu/mstd/
Museum Studies Contact	Send e-mail to museum@iupui.edu
Shaping Outcomes Contacts:	Send e-mail to: outcomes@iupui.edu

1. Materials for Teaching and Administering *Shaping Outcomes*

Frequently Asked OBPE Questions…

The Institute of Museum and Library Services (IMLS) is a federal agency that fosters leadership, innovation, and a lifetime of learning through grants to museums and libraries. Please see IMLS Web site at http://imls.gov for additional information about IMLS and its activities and grant programs. Since 1997 IMLS has been committed to helping libraries and museums strengthen their programs and their capacity to evaluate the impact of their work through systematic evaluation of results – outcomes. Some of the questions libraries and museums of all sizes and types have asked about outcome-based evaluation are answered below. IMLS defines outcomes as they pertain to its own grant programs and its typical grantees, and does not claim or intend to speak beyond its own interests and community. At the same time, we are aware that there is a broad and growing trend for accountability in the form of outcomes-based reporting to government at all levels, to foundations, and to donors. The IMLS perspective is evolving in response to experience in the field, but we hope the following responses clarify our current perspective.

What is outcomes-based planning and evaluation (OBPE)?

Outcome-based planning and evaluation, sometimes called outcomes measurement, is a systemic way to determine if a program has achieved its goals. The organized process of developing an outcome-based program and a logic model (an evaluation plan) helps institutions articulate and establish clear program benefits (outcomes), identify ways to measure those program benefits (indicators), clarify the specific individuals or groups for which the program's benefits are intended (target audience), and design program services to reach that audience and achieve the desired results.

What is an "outcome" and how do you evaluate (measure) them?

An outcome is a benefit that occurs to participants of a program; when the benefits to many individuals are viewed together, they show the program's impact. Typically, outcomes represent an achievement or a change in behavior, skills, knowledge, attitude, status or life condition of participants related to participation in a program. In OBPE, an outcome *always* focuses on what participants will say, think, know, feel, or be–not on *mechanisms or processes* which programs use to create their hoped-for results. Well-designed programs usually choose outcomes that participants would recognize as benefits to themselves. To simplify planning for evaluation, state the outcome you want to produce in simple, concrete, active terms.

Poor Outcome Statements	Better Outcome Statements
• Students will know how to use the Web	• Students will demonstrate information literacy skills
• Users will have better health information	• Users will make healthier life-style choices
• Museum staff will be trained in curriculum design	• Museum staff will know the key elements of successful education programs
• Democracy will flourish	• Visitors will register to vote

What is the difference between outputs and outcomes?

Outputs are measures of the volume of a program's activity: products created or delivered, people served, activities and services carried out. Think of outputs as the "things" piece of evaluation. Outputs are almost always numbers: the number of loans, the number of ILLs, the number of attendees, the number of publications, the number of grants made, or the number of times a course was presented. Outcomes are the "people" or the "so what" piece – what happened *because* of the outputs.

Outputs	Outcomes
• 42 staff members will complete training • 37 museums will participate in education training • 4 courses will be held • participants will receive 3 CEUs	• Museum staff will know the key elements of successful education programs • Customers will report high satisfaction with reference service

How do I choose outcomes for my program?

First, carefully think out and describe the purpose of the program. A program is not usually developed only to carry out various actions or tasks. There is a reason for undertaking the tasks and offering the services. Most modern museums and libraries don't build collections only to own them, or to go through the processes of cataloging, storing, and maintaining them. They develop collections to support the need of existing or anticipated users for information and education.

Ask, "why are we offering this program, what do we want to accomplish, and who do we want to benefit?" It may be helpful to ask program staff, program partners, and other stakeholders, "If we are really successful with this program, what will the results look like for the people we served?" Equally important is knowing your audience, their needs and wants, and what your program can do to help them achieve their aims.

The answers to those questions should allow you to describe the changes or impact that you want to see as a result of the program. Those hoped-for changes become the intended program outcomes.

What is an indicator?

Indicators are the specific, observable, and measurable characteristics, actions, or conditions that tell a program whether a desired achievement or change has happened. To measure outcomes accurately, indicators must be concrete, well-defined, and observable; usually they are also countable.

Poor Indicators	Better Indicators
• The # and % of students who know how to use the Web	• The # and % of participating students who can bring up an Internet search engine, enter a topic in the search function, and bring up one example of the information being sought within 15 minutes
• Visitors will make healthier choices	• The # and % of users who report they made one or more life-style changes from a list of 10 key life-style health factors in the last six months

It is easier to construct a good indicator if you use the format:

Number and/or percent of a **specific target population** who **report, demonstrate, exhibit** an **attitude, skill, knowledge, behavior, status, or life condition** in a **specified quantity** in a **specified timeframe and/or circumstance**

- Number and percent: Both number and percent are usually specified to provide adequate information. If only two people participate in your program, after all, reporting that 50% of them benefited could be misleading. Examples: 30% of 150, 75% of 25, 10% of 1,500.

- Target audience: The group of people the program hopes to affect. Effective programs keep the characteristics of the people they want to benefit clearly in mind. The more narrowly and specifically the group of people who are expected to participate in a program can be described, the greater the likelihood that a program will be designed to actually reach them. Examples (low to high definition): Maryland residents, Baltimore high-school students, Howard County mothers at literacy level 1 or below.

- Report, demonstrate, exhibit: Note that all of these are active, observable behaviors or characteristics that don't depend on guesswork or interpretation.

Attitude	What someone feels or thinks about something; e.g., to like, to be satisfied, to value….
Skill	What someone can do; e.g., log on to a computer, format a word processed document, read….

Knowledge:	What someone knows; e.g., the symptoms of diabetes, the state capitals, how to use a dictionary….
Behavior:	How someone acts; e.g., listens to others in a group, reads to children, votes….
Status:	Someone's social or professional condition; e.g., registered voter, high-school graduate, employed….
Life condition:	Someone's physical condition; e.g., non-smoker, overweight, cancer-free . . .

- Specified quantity and specified timeframe or circumstance: This is the measurable part of an indicator. It asks the program developer to choose a quantity of achievement or change that is enough to show the desired result happened, and the circumstances or timeframe in which the result will be demonstrated. Examples: three times per week, in 15 minutes or less, 6 months after the program ends, 4 or higher on a 5-point scale.

What kinds of programs are best suited for OBPE?

Most programs can incorporate OBPE as an effective and efficient management tool. Specifically, OBPE is geared toward measuring the impact of a program on a specific group of people known as a target audience. Any program that intends to educate or train participants (to change or build attitudes, skills, knowledge, behavior, status, or life condition) can be designed with outcomes at its core and can be evaluated using OBPE concepts.

As one example, the IMLS CAP program provides information to help museums set priorities and address the preservation and conservation needs of their collections. The information, or the report that the CAP consultant provides, is not the purpose of CAP. The purpose (desired outcome) is changed knowledge and behavior on the part of museum staff – we hope that they in turn will improve collections maintenance practice and create a formal, prioritized management plan to address collection needs. Here, too, we assume that in the long term there will be a benefit to end audiences in improved or expanded exhibits and programs built on the collections that are protected by the staff's improved actions. CAP recipients could be asked to report to what extent they've achieved those goals to tell IMLS if CAP has realized its intended outcomes.

In another example, among the State Library Programs there are many examples of state-wide professional training initiatives. In Texas, for instance, regional providers offer technology training to help library staff keep their computers running and online. Texas could evaluate the success of that program by looking for evidence that librarians who complete that training can solve basic, frequently-experienced computer problems such as a frozen screen – that would be a desired outcome that can be measured. IMLS provides LSTA funds for technology infrastructure because lawmakers assume that technology is needed for better support of both users and the staff who provide services. The State Library Administrative Agencies could know if they were meeting those goals by looking for outcomes related to technology training or use of expanded resources or information.

Most National Leadership Discretionary Grants include the intention to provide a model for other institutions. We envision that the research that they carry out will be used by others. It is possible for grantees to evaluate the extent to which they have successfully in communicated their model by asking their target audiences (usually library or museum professionals and educators) whether they know key concepts from the research, and/or how they have used or intend to use the results of the research.

Of course there are programs for which OBPE is not applicable. We encourage museums and libraries to talk to IMLS staff if they are uncertain if OBPE can be useful for their proposed or funded program.

Do I have to evaluate every program my institution offers?

No. We believe IMLS constituents will come to know the benefit of OBPE and will want to incorporate it in many, if not all, programs, particularly those that have a clear audience to whom a program is targeted. We're urging library and museum staff to choose one program that they offer, and to "pilot-test" OBPE with that program. That will provide the experience to decide what skills and resources an institution needs to develop to demonstrate and report outcomes to its stakeholders.

How many program participants have to be evaluated, all or a sample?

For many programs it is possible to evaluate the impact to all participants. Others will have access to only a sample of participants. This is often true, for example, of programs to provide digital resources – collections, exhibits, curriculum tools, or Web sites. Many programs will seek volunteers to answer questionnaires or to participate in focus groups to provide outcome information. This is perfectly acceptable.

Will funders pay for small outcomes?

For IMLS it is less about small or large outcomes than about what you hoped to achieve for an audience, what you learned in the process and what was reasonable to expect for that audience. In some cases a 10% improvement is very significant, while in others, a 90% impact is reasonable to expect. You need to know your audience and your stakeholders and creating appropriate goals and expectations. When that is done, and outcomes still fall short of goals, OBPE allows institutions to assess, explain, and learn from why outcomes fell short of goals. Without OBPE, it can appear as if a program just didn't do what it said it would. With OBPE, you have the opportunity to learn why and make improvements for the next offering, or the next program.

IMLS turns to its reviewers to decide what programs seem most promising and most needed. If a proposed program can show a clear plan for evaluation that will demonstrate meaningful outcomes (even small ones) concretely and objectively, we believe reviewers will find it very competitive.

Finally, the "size" of the outcome is proportionate to the size of the target audience and the duration or the intensity of their experience in a program. If a program works closely with a small number of participants, the outcome might look small, but might be profound for those participants. If a program offers a rapid service to a very large number of participants or users, the outcome is likely to be minor, but may reach many people. Reviewer's assessments of a proposal consider those factors.

Many proposals make idealized claims for anticipated contributions without offering any concrete information about how program managers will know if their intentions were realized. Some favorite examples include: "If this program is funded, democracy will flourish," and, "If other states followed our model they would find it very productive." It is increasingly important to resource allocators and policy makers that programs or programs have concrete audience benefits, with services designed to achieve them for a clearly-defined audience, and that managers demonstrate that the benefits were achieved

Can my program take credit for large outcomes?

Certainly, if the outcomes were logical and closely related results of the services provided. "Attribution" is less concerned with big or small outcomes and more concerned with the logical connection between services and outcomes and the clarity of indicators. Part of the usefulness of OBPE is the concrete, objective way it can connect participation in a program or service to specific knowledge, attitudes, behaviors, skills, and other achievements.

What does OBPE cost?

On average, an institution should budget 7-10% of a program's total budget to cover the costs of OBPE. Almost all funders require some evaluation, and many request substantive evaluation. As a result funders expect that evaluation costs will be included in the budget for any program. Remember that in the case of State Program grants, LSTA funds may be used for evaluation. In the case of IMLS discretionary grants, staff time, and other resources required for evaluation can be used to match funds awarded directly, or funds can be requested for evaluation. The exact cost will depend on the program, the level of evaluation and the knowledge of the organization.

If OBPE is not the same as academic research, and the results may not be reliable evidence of outcomes, so why should I do it?

Formal research is one way of capturing information, not the only way. OBPE is a strong, effective and reliable *management* tool that provides an institution with information regarding the degree to which a program did what it set out to do. While it does not allow you to determine and claim unique or complete credit for an outcome, it does allow you to demonstrate the degree to which a program contributed to the outcome for individuals. If you have *no* information, you cannot credibly claim *any* contribution to impact.

This is a burning question for many in the library and museum worlds, in part because academic training conditions us to look skeptically at any information that is not statistically valid, rigorous in its sample selection, and otherwise derived from the scientific model. In OBPE, we're not looking for information we intend to extend to other institutions or contexts. Instead, we're looking to see if what we did had the result we intended. That information helps us make decisions about a particular program: whether to continue it, expand it, improve it, or replace it with another.

OBPE normally looks at an individual program's participants for logical, credible evidence that a limited number of very specific, observable attributes or phenomena happened in relatively close proximity to an experience or service designed to produce them for those particular people.

OBPE doesn't usually look for signs that participants have more or better of what it's evaluating than non-participants. It is not intended to prove that one program did something more effectively than another (although that's possible).

If a program intends to show unique attribution, to demonstrate the relative worth of one approach measured against others, or to provide a tool for use by other organizations, then of course it needs to turn to the tools and criteria of research. Since the use of the data provided by OBPE is limited, we can usually be satisfied if information that is accurate, without requiring statistical rigor, blind or random sampling, or other characteristics of research for which broad applications are intended.

What do I look for in an evaluator?

Someone who has a strong working knowledge of outcome-based evaluation – measuring impact on the people served by a program – and also has knowledge and experience working with your discipline. A good evaluator can quickly assess and learn your specific programs and mission. It helps, but is not a requirement, that they have experience evaluating similar programs.

How many outcomes should my program have?

A program needs to have at least one outcome; however, programs are likely to have more than one outcome. It is important to consider what the purpose of the program is and the ways you would expect participants to benefit from your program. These benefits will likely be the outcomes for your program, but you need not measure everything. You may want to prioritize this list and determine what you and your program's stakeholders would really need to know about the program's impact.

What is a logic model and is it necessary?

A logic model is a step-by-step approach for defining and measuring outcomes. It is your program's *evaluation plan.* It shows how you will measure outcomes, what information you need to collect, who you will collect information about, when you will get the information and what targets you have chosen for the outcomes.

Yes, a logic model is essential to the success of your institution's implementation of outcome-based evaluation. Without this, outcome based evaluation will not become a reality for your institution.

Logic Model Elements and Structure

Outcome	Indicator	Data source	Applied to	Data interval	Target (Goal)
Definitions:					
• Intended Impact	• Observable and measurable behaviors and conditions	• Sources of information about conditions being measured	• The specific group within an audience to be measured (all or a subset)	• When data will be collected	• The amount of impact desired
Examples:					
• Students will have basic Internet skills	• The # and % of participating students who can bring up an Internet search engine, and enter a topic in the search function, and bring up one example of the information being sought within 15 minutes	• Searching exercise, trainer observation	• Howard County 7th-8th graders who complete the workshop	• At end of workshop	• 85% of approximately 125 participants

How complicated is outcome-based evaluation?

Once the concepts are understood and you have successfully implemented it a few times, it is a very simple process to understand and manage. The key to success is commitment of the institution and the clear identification of roles in managing OBPE.

How much time will it take?

It isn't possible to prescribe a time for all programs. It does take a commitment of time and resources to get it done. The majority of time comes at the front end, particularly as you first begin to implement outcome-based evaluation in your institution. In compensation, once incorporated, OBPE can save significant time in planning and management by allowing you to get at the right questions, and answers, early on in the program planning process.

What can outcome based evaluation do for my institution?

Employing outcome-based evaluation and reporting on the impact of the program can have many positive benefits for an organization:

- First, it can help institutions tell their story in ways their stakeholders and the general public can understand and appreciate. It helps institutions convey important information about the collective impact on their program participants, while maintaining the ability to convey the very powerful and personal stories that show how important the program was to specific individuals.

- Second, it can help better position institutions to request and receive funding because they can describe the intended benefits and impact of a proposed program in very specific terms by identifying what the program will do for participants. This is particularly important given that more and more funders expect programs to identify what they hope to achieve as a result of funding.

- Third, when OBPE becomes part of an organization's management routine, its programs can be improved as a result. Program goals are well planned and established, and these goals are regularly reviewed. Stakeholders are informed about the impact of funded programs. In turn, outcome-based evaluation will helps an organization's program staff better communicate the benefits they intend to deliver to program participants – it can aid recruitment and marketing.

Aren't some things difficult to measure?

Some things will seem more difficult to measure (evaluate) than others, and not all things programs accomplish need be measured. It is often more straightforward to measure "hard" impact, such as knowledge, behavior, and skills than it is to measure "soft" impact such as attitudes. Measuring attitude changes or other "soft" impacts is not actually more difficult, but it may require more creativity. Regardless, clarifying the relationship between an outcome and measurable and observable "indicators" is key to success.

How will I know if my outcomes are good enough?

Outcomes are effective if they 1) are closely associated with the purpose of a program and describe what an organization wants to make happen for people, 2) are realistic and within the scope of what the program can affect and 3) have indicators that allow them to be measured.

How do I report outcome based evaluation information?

Consider what your program's stakeholders want to know about the results of your program when developing reports from outcome-based evaluation data. The institution's Board, its community, and funders may want similar information, but this does not mean that one report will satisfy everyone. In general, consider the following as desirable information for reports:

- Needs identified
- Inputs (what we used)
- Activities and services (what we did)
- Audience (characteristics and participation)
- Outputs (what we produced)
- Outcomes (what impact we achieved and how we know) and
- Interpretation (what it all means, why it matters)

Where can I get more information?

Current IMLS grantees can contact their program officer to discuss the specifics of their IMLS grant program and its evaluation. Institutions considering a proposal to IMLS can contact the grant officer for that program. Any institution that is interested in knowing more about the IMLS OBPE initiative can contact Karen Motylewski of the IMLS Research and Technology Office (202-606-5551 or kmotylewski@imls.gov). IMLS staff works closely together, so program officers may refer callers to Karen, or vice versa.

As of 2007, IMLS offers a two-day workshop in OBPE for IMLS-funded programs to each new National Leadership Grantee and to each State Library Administrative Agency. Additional resources will be added to the IMLS Web site gradually. IMLS recently contracted for a tool kit for OBPE for libraries and museums, and anticipates that that resource will be available in print and online in at the end of 2002. See the IMLS bibliography for OBPE for a variety of helpful manuals and other resources, many of which are available at no cost online. Other organizations offer assistance in the context of their grants. Among the most readily available come from Project Star of the National Core for Service, the Kellogg Foundation, and the United Way of America. All are referenced in the IMLS OBPE bibliography and both have many regional and local offices.

SHAPING OUTCOMES TECHNOLOGY AND COMPUTING REQUIREMENTS CHECKLIST

YOU WILL NEED:

1. _____ High-speed or broadband or Ethernet connection to the Web
2. _____ Web browser (later versions of Internet Explorer, Firefox, Netscape)
3. _____ Adobe Acrobat
4. _____ Printer

LOGIN TO:

- *Shaping Outcomes* tutorial
  < http://www.shapingoutcomes.org/ >

- Shaping Outcomes wiki
  < http://shapingoutcomes.wikidot.com/ >

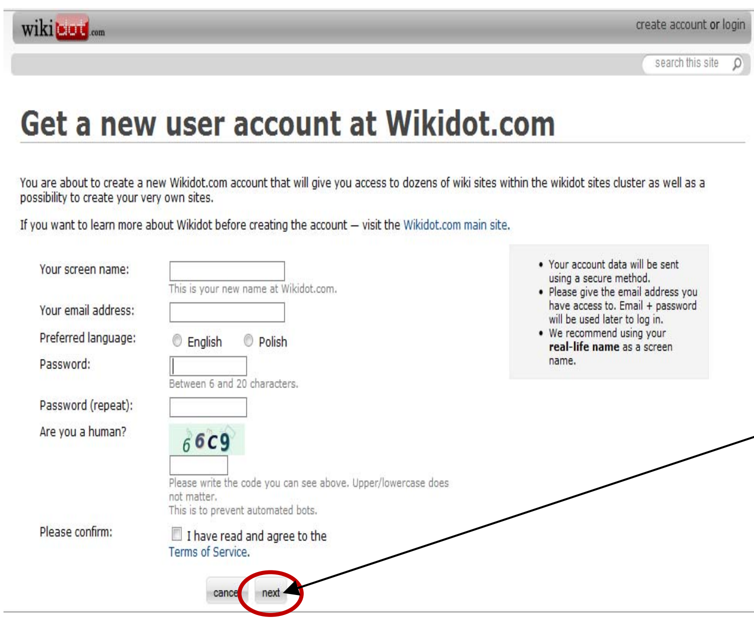
- Logic Model worksheet
  < http://www.shapingoutcomes.org/course/model/model.doc >

TECHNICAL REQUIRMENTS:

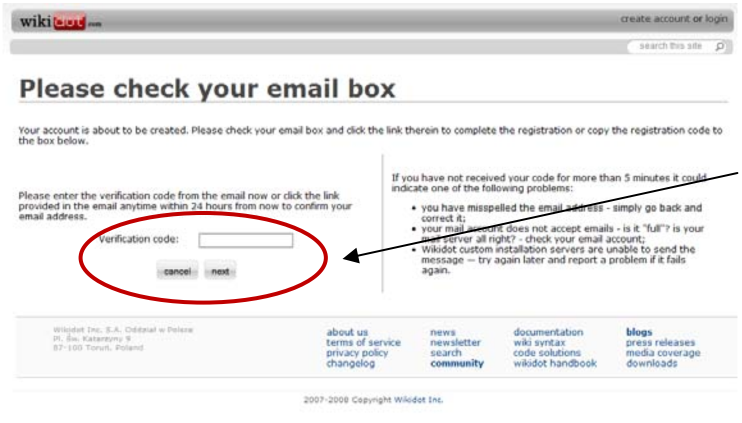
Operating System:	Windows XP or newer; Mac OSX or newer
Screen Display / Monitor Resolution *:	1024x768 optimal; 800x600 acceptable
Color *:	16-bit (thousands) color or higher bit depth
JavaScript *:	Set to enable
Pop-ups *:	Set to allow
Cookies:	set to enable
* Detailed instructions at: < http://www.shapingoutcomes.org/course/orientation/#5 >	

Setting-Up a Wikidot Account

http://www.wikidot.com/
Click on create account



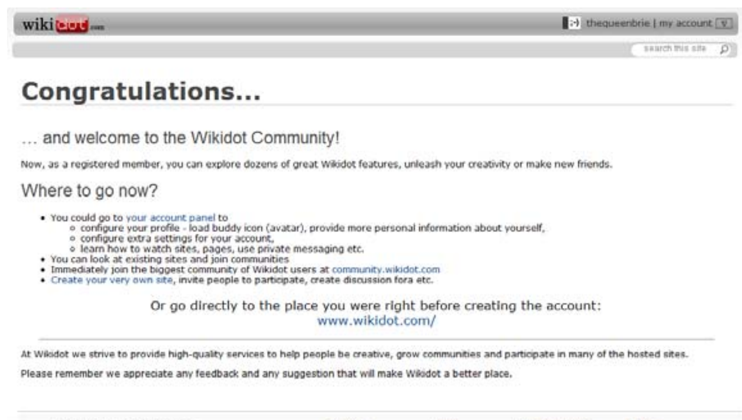
Fill in the information and click



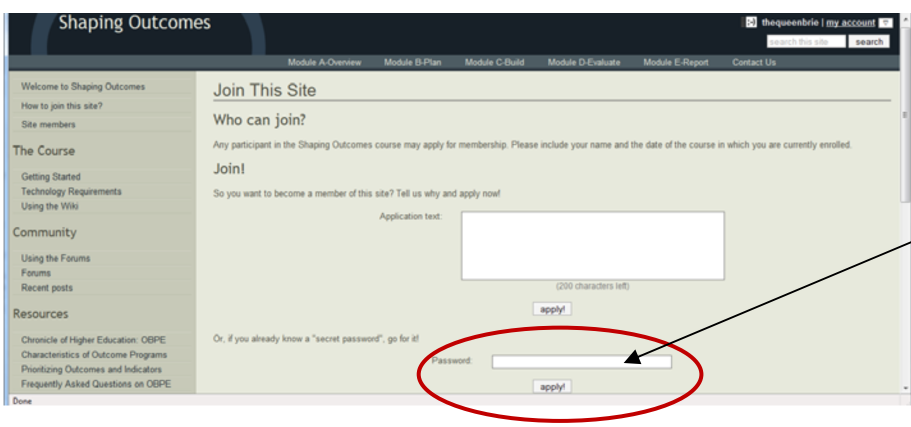
Check your email and enter the verification code sent by Wikidot.

Click next

You now have a Wikidot account.



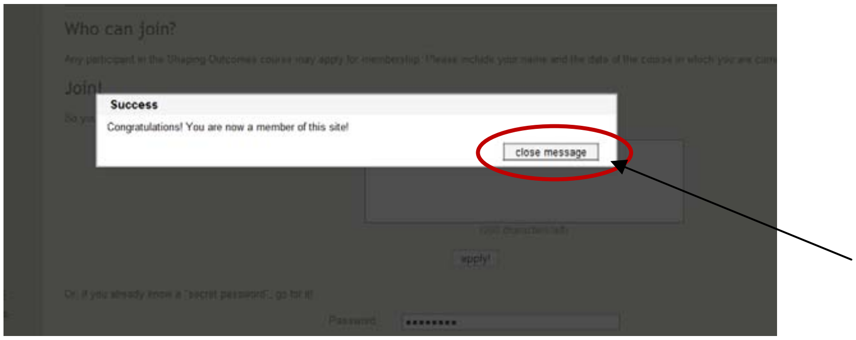
Now, go to http://shapingoutcomes.wikidot.com/system:join



Enter the password:

outcomes

in the password area and click apply!



You should get a message saying that you are a member of the site. Once you become a member, we will enable moderator rights where you can edit various pages and forum posts. Close the message. Now you can look at the wiki organization.

Responsibilities and Time Commitments of Shaping Outcomes Instructors

The *Shaping Outcomes* Course

- The course often runs for a total of six weeks. It can also be run in a variety of other formats (3-hour, one-day, 2-6 weeks).
- It is self-paced for the student (ideally the student should be going through a module per week with an extra week at the end to finish up his/her logic model)
- There are usually 15 participants per course.

Time required of the Instructor

- There will be about two to five hours of prep time that the instructor must allow him/herself in order to review modules, the tutorial orientation, and the Instructor's Manual.
- The instructor should allow, on average, about an hour and a half per student for feedback and correspondence. The instructor can set up his/her own time schedule for
- On occasion, once the course is complete, some instructors may be asked to fill out an instructor's survey. This takes, on average, about a half an hour to complete.

WELCOME AND ISTRUCTIONS FOR GETTING STARTED WITH *SHAPING OUTCOMES*

Welcome to Shaping Outcomes!

Shaping Outcomes is an online, Web-based tutorial from the IMLS to help museum and library professionals learn more about *OBPE* (outcomes-based planning and evaluation).

This course will:

- Introduce you to the basic concepts and terminology of outcome based planning
- Help you better articulate how your program makes an impact
- Give you tools to demonstrate a program's value to funders and stakeholders
- Provide you with ways to help unite project teams around big ideas and goals

In this course, you will learn to create a program with realistic, achievable goals and outcomes using OBPE.

To complete the course, you will use three resources:

1. **Wikidot wiki**. Here you will be able to access all of course instructions, submit assignments, participate in discussions, and ask questions.
   http://www.shapingoutcomes.wikidot.com

2. **Shaping Outcomes Tutorial**
   http://www.shapingoutcomes.org/course

3. **Logic model worksheet**
   http://www.shapingoutcomes.org/course/model/model.doc

To Do Before Beginning ***Shaping Outcomes*****:**

1. Be sure that your computer and Internet access are configured properly. Use the **'Technical Services Checklist'** located in the wiki site. Help is also available at the Shaping Outcomes orientation site:
   http://www.shapingoutcomes.org/course/orientation/index.htm

2. Complete the Shaping Outcomes **Tutorial Orientation** located on the Web at:
   http://www.shapingoutcomes.org/course/orientation/index.htm

   The **Tutorial Orientation** includes information about terminology, how to work through the *Shaping Outcomes* course, and more.

Begin with a project or program idea: The ideal way to learn how to do outcome based planning and evaluation is to work on something practical that will benefit you and the project. Before you begin the course, have an idea for a project that you will use as you learn. This will be the source for your assignments and logic model. Projects that are appropriate for *Shaping Outcomes* should have several characteristics:

- The project should be discrete, meaning that it has to have a beginning and an end.

- The project should be special, in that it is unique and not already part of the ordinary business of your organization.

- The project should be audience-oriented, meaning that it has to make a difference or have an impact for some persons, somewhere.

Work through the learning Modules A - E -- reading all of the interactive tutorial screens, and working through the "library" or "museum" examples.

Assignments may be made for each module.

For each module, participants will:

a) Read all **Shaping Outcomes Tutorial** screens. If you are a librarian, complete the "library examples". If you are a museum professional, complete the "museum examples".

b) Explore the *Check Your Understanding* sections (mouse roll-overs) in the **Shaping Outcomes Tutorial.**

c) Review the *Apply Your Understanding* sections and post your responses in the Forum section of the wiki (optional).

Webography: Five-Year Evaluation Sources and Approaches

The following examples reflect the wide range of information and resources available to guide decisions about collecting information to support the messages above. IMLS offers the list as a resource. It is not intended to be prescriptive, limiting, exhaustive, or exclusive, and it is not an endorsement of any particular publication or Web site. Examples have been categorized, but some span more than one category, most typically combining input/output data with outcomes measurement.

All links were correct and active as dated, but URLs change frequently and it is very difficult to keep pace. If you find a closed or incorrect link, try entering the full title of the publication or resource in a good search engine. This will often direct you to the new URL.

How Much We Do: Inputs and outputs

- Federal-State Cooperative System, data collection program (http://nces.ed.gov/surveys/libraries/FSCS.asp, 9/26/05). Each state is responsible for data collection from its public libraries using NISO standards (see below), and for submitting that data to the National Center for Educational Statistics. NCES works collaboratively with the National Commission on Libraries and Information Science and the Bureau of the Census to implement the Public Libraries Survey and publish the data.
- Public Library Association, *Public Library Data Service Statistical Report* (http://www.ala.org/ala/pla/plapubs/pldsstatreport/pldsstatistical.htm, 9/26/05). Annual data collection categories include financial information, library resources and per capita measures, use figures, technology-related statistics and more. Special surveys are undertaken in some years.
- Sirsi, Normative Data Project (http://www.librarynormativedata.info/, 9/26/05). Subscribers have access to NDP; decision-makers from other libraries can also subscribe to NDP data and resources that enable decision-makers to compare and contrast their institutions with norms like circulation, collections, finances, and other parameters. The resource compiles transaction data from libraries and links the data with geographic and demographic data about their communities.
- Web logs
  - *The Value of Web Log Data in Use-Based Design and Testing*, Mary C. Burton and Joseph B. Walther, J. Computer Mediated Communication 6(3), April 2001 (http://jcmc.indiana.edu/vol6/issue3/burton.html, 9/26/05).
  - *Web Analytics: How to Use Web Analytics Effectively*, About.com (http://Webdesign.about.com/od/loganalysis/a/aa062705.htm, 9/26/05).

How Well We Do It: Customer Satisfaction, Quality Benchmarks, Standards

- American Association of Museums, accreditation standards (http://www.aam-us.org/museumresources/accred/index.cfm, 9/26/05). The AAM Accreditation Program is a vehicle for museum quality assurance, self-regulation, and public accountability. Developed and sustained by museum professionals, the Program reflects, reinforces, and promotes best practices, institutional ethics, and standards of museum operations.
- American Association of State and Local History, Performance Management Program (http://www.aaslh.org/perfmanagement.htm, 9/26/05). This tool is designed to help history museums measure visitor satisfaction. Developed in partnership with the Center for Nonprofit Management of Nashville, the package includes a survey instrument, training, assistance, and benchmarks.
- Association of Research Libraries, *LibQUAL+* (http://www.libqual.org/About/FAQ/index.cfm, 9/26/05). *LibQUAL+* is a suite of services developed and managed to help libraries know and act upon users' opinions of service quality. The core of the program is a Web-based survey plus training to help libraries assess and improve library services, change organizational culture, and market the library. Members can access comparative data from other member libraries.
- Balanced scorecard, Baldridge National Quality Program (http://www.quality.nist.gov/, 9/27/05)
- *Carter MacNamara's Free Management Library* (http://www.managementhelp.org/org_perf/bal_card.htm, 9/27/05). This site provides a resource for a wide range of management issues very useful to museums and libraries, among others, including information on balanced scorecard and related approaches.

- City of Carlsbad, CA, library balanced scorecard project (http://www.ci.carlsbad.ca.us/imls/vol.html, 9/27/05). This IMLS-funded project is developing a tool and model for public library management and assessment based on balanced scorecard concepts.
- Delaware Department of State Division of Libraries, *Statewide Master Study* (http://www.state.lib.de.us/Library_Development/Public_Libraries/Statewide_Master_Study/, 9/28/05). Delaware's application of the Baldridge and balanced scorecard concepts to library assessment and planning.
- Colorado State Library Public, library standards (http://www.cde.state.co.us/cdelib/Standards/Index.htm, 9/28/05) is an example of the growing number of state benchmarks for library quality which provide one way of documenting library performance.
- *Hennen's American Public Library Ratings* (http://www.haplr-index.com/ratings.html, 9/26/05). Annual HAPLR scores, based on FSCS data, are published in *American Libraries* (see, e.g. *AL* October 2004, pp. 54-59). The scores weight selected input and output measures to rank library quality.
- Association of Research Libraries, *LibQUAL+* (http://www.libqual.org/About/FAQ/index.cfm, 9/26/05). *LibQUAL+* is a suite of services developed and managed to help libraries know and act upon users' opinions of service quality. The core of the program is a Web-based survey plus training to help libraries assess and improve library services, change organizational culture, and market the library. Members can access comparative data from other member libraries.
- National Information Standards Organization (http://niso.org). NISO develops standards for a variety of information applications. See for example NISO Z39.7-2004, *Information Services And Use: Metrics & Statistics For Libraries And Information Providers* (http://www.niso.org/emetrics/current/category1.2.html, 9/26/05). This standard specifies parameters for definition, collection, and interpretation of statistical data used to describe the status and condition of libraries in the US, for the purpose of understanding and improving performance. NISO standards inform FSCS data collection.

What We Cost/What We're Worth: Return on Investment and Cost: Benefit

- *Taxpayer Return on Investment in Florida Public Libraries: Summary Report* (http://dlis.dos.state.fl.us/bld/roi/pdfs/ROISummaryReport.pdf, 9/26/05). This study was done for the State Library and Archives of Florida by Jose-Marie Griffiths, Donald W. King, Christinger Tomer, Thomas Lynch, and Julie Harrington, variously of the Universities of Pittsburgh and North Carolina at Chapel Hill, the State University of Florida, and the Florida state library and archives, 2004.
- *The Economic Impact of Public Libraries on South Carolina* (http://www.libsci.sc.edu/SCEIS/exsummary.pdf, 9/26/05). This study was done for the University of South Carolina by Daniel D. Barron, Robert V. Williams, Stephen Bajjaly, Jennifer Arns, and Steven Wilson of the School of Library and Information Science, University of South Carolina, 2005.
- Bibliography of articles on the St. Louis Public Library cost-benefit analysis study (http://www.slpl.lib.mo.us/libsrc/bibart.htm,). Glen Holt and staff at SLPL developed and tested a model of cost-benefit based on the public's projected willingness to pay for library services that could be used at the local level.
- Americans for the Arts' *Arts & Economic Prosperity Calculator* (http://ww3.artsusa.org/information_resources/economic_impact/calculator.asp, 9/26/05). This is a free Web-based tool that estimates the economic impact of a nonprofit arts organization on its local economy. The tool is based on research from 91 communities that were part of Americans for the Arts' national study of nonprofit arts organizations and their audiences. It makes very broad assumptions, but if accepted, they can be used to model the economic benefit of a museum or library.

Why We Matter: Outcomes Measurement, Impact Assessment

- California State Library outcomes measurement information (http://www.library.ca.gov/html/grants.cfm#out, 9/26/05) and *Outcomes Measurement Basics* (http://www.library.ca.gov/assets/acrobat/lsta/OutcomesMeasurementBasics.pdf, 9/26/05). These materials, prepared by consultant Rhea Rubin, whose book on outcomes measurement for libraries is expected shortly, provide a good introduction to definitions and concepts that closely parallel those of the IMLS.
- Colorado Library Research Service *Counting on Results* (http://www.lrs.org/documents/cor/CoR_FullFinalReport.pdf, 9/26/05). An IMLS grant supported development of this study to develop a locally useful instrument and tools to understand and document the ways that people use and learn in public libraries. The study was not extended widely, but suggests a practical approach and questions that could be used to show library outcomes.
- Corporation for Public Broadcasting *Outreach Planning and Assessment Toolkit* (http://nationaloutreach.org/MeasuringImpact/login.cfm?error=3, 9/26/05). This demo site for the National Center for Outreach targets a public broadcaster audience and a narrow range of programs, but it closely parallels the IMLS model and would be helpful to libraries and museums. It is an online planning process that develops a survey and provides a data

collection and management resource. IMLS is in the early stages of beta testing an independently developed but similar resource specifically for our audiences. Contact nationaloutreach@wpt.org to inquire about access to the demo.

- *eVALUEd* is a toolkit for evaluating digital library services (http://www.evalued.uce.ac.uk/tools_archive/useandusers/impact.htm#ILS, 9/28/05). Developed by the University of Central England, it includes case examples, tools, and a Web-based customized survey developer.
- Laser Foundation *Libraries Impact Project* (http://www.bl.uk/about/cooperation/pdf/laserfinal6.pdf, 9/26/05). Carried out for the UK Department of Culture, Media, and Sport with collaboration by the Museums, Libraries, and Archives Council, this study report supports developing library standards and impact measures that can be broadly used by local libraries. It combines statistics, and information derived from surveys and focus groups to build a rationale and piloted evaluation approaches for showing library impact.
- *Library Services and Technology Act Outcome-Based Training Toolkit* (http://www.lstatoolkit.com/, 9/26/05). This resource was developed with an IMLS grant to provide an outcomes plan "wizard," data report forms, instruction in outcome-oriented evaluation and data collection, tools for data analysis, guidance in reporting project progress, and strategies for reporting project results. It is specific to Florida's LSTA program, definitions, and needs but could translate to other states.
- Museums, Libraries, and Archives Council (UK), *Inspiring Learning for All* (overview at http://www.inspiringlearningforall.gov.uk/introduction/default.aspx and evaluation at http://www.inspiringlearningforall.gov.uk/measuring_learning/steps_in_the_process/default.aspx, 9/28/05). This "sourcebook" lays out a framework for understanding learning outcomes in museums and libraries and provides tools to find out what the people that use your services learn, assess how well your program incorporates good practices, and improve what you do. It includes "generic" outcomes that are typical for library and museum services (http://www.inspiringlearningforall.gov.uk/uploads/More%20about%20the%20GLO's.doc).
- Office of Management and Budget, *Performance Assessment and Rating Tool* (http://www.whitehouse.gov/omb/part/, 9/26/05). This is the model the federal government will eventually apply to all its programs. The IMLS State Program will be subject to this process beginning in 2006. OMB and the Government Performance and Results Act of 1993, on which many states have based their own agency management guidelines, distinguish between performance (efficiency and productivity) and results (outcomes and impact).
- *Outcomes Toolkit Ver. 2.0* (http://ibec.ischool.washington.edu/ibecCat.aspx?subCat=Peninsula%20CIP&cat=Projects, 9/26/05). This project that began as "How Libraries and Librarians Help" under funding from IMLS. It has evolved to address the needs of not-for-profit organizations committed to community information resources (primarily libraries) as *Information Behavior in Everyday Contexts*, a project of the University of Michigan and the University of Washington information schools.
- Southern Ontario Library Service, The Library's Contribution to Your Community: *A Resource Manual for Libraries to Document their Social and Economic Contribution to the Local Community* (http://www.sols.org/librarydev/publications/lctyc/, 9/28/05). This manual is designed for public libraries. It identifies possible social and economic benefits of library services and describes how to document a library's delivery of them. It provides tools for collecting necessary information and outlines a communication strategy to use the information.
- Texas State Library and Archives, *Outcome Measures* (http://www.tsl.state.tx.us/outcomes/, 9/26/05). This is a model, but it is an excellent source of resources and guides for outcomes-oriented planning and measurement specific to libraries and state library agency concerns.

IMLS:km 9/28/05

Modules A - E Activities Graphs

Getting Started:

When	Activity/Tool	Where / URL/ Access
Preparation before beginning tutorial: Familiarize yourself with the tutorial and be sure that technical requirements are met.	Tutorial Orientation	http://shapingoutcomes/org/course/ orientation/index.htm
	Technical Requirements	Resources section of the Instructor's Manual. This information is posted on the wiki.
	Users' requirements checklist	Resources section of the Instructor's Manual. This information is posted on the wiki.
	Instructors should be sure that all materials, content, and instructions are available on the wiki.	Wiki http://shapingoutcomes.wikidot.com/

Module A:

<table>
<tr><th colspan="2">Module A</th></tr>
<tr><th>Primary Activities</th><th>Location</th></tr>
<tr><td>Complete Module A</td><td>http://www.shapingoutcomes.org/course</td></tr>
<tr><td>Community-building option:
Instructors and students post personal profiles in the wiki; read each other's profile; connect with in-class colleagues</td><td>http://shapingoutcomes.wikidot.com/forum:start</td></tr>
<tr><th colspan="2">Other activities to consider as time permits:</th></tr>
<tr><td><u>Community-building optional activities</u>:

Use content in "Coach" or "Dig Deeper" tabs (in Module A) to generate discussion among class members, allowing them to continue sharing ideas and comments.

Talk about the Module A "Check Your Understanding" or "Apply Your Understanding" case assignments.</td><td>Instructors can easily add new discussion forums where students can post and discuss assignments.</td></tr>
<tr><td><u>Optional Assignments</u>:

Complete the Module A "Check Your Understanding" case.

Complete Module A "Apply Your Understanding" case.

Post your findings and comments in the wiki.</td><td>Instructors can easily add new discussion forums where students can post and discuss assignments.</td></tr>
</table>

Module B:

Module B	
Primary Activities	**Location**
Complete Module B	http://www.shapingoutcomes.org/course
Begin working on your logic model and post for instructor review. Instructors: Remember that you can have due dates for specific chunks of content in the logic models. For example, you can ask students to complete up to "stakeholders."	Wiki Module B Logic Model forum
Community-building activity:	Have participants post brief descriptions of their programs. Each participant can read and reply to others' postings.
Other activities to consider as time permits:	
Community-building optional activities: Students can continue sharing ideas and comments about their projects. Use content in "Coach" or "Dig Deeper" tabs (in Module B) to generate discussion among class members, allowing them to continue sharing ideas and comments. Talk about the Module B "Check Your Understanding" or "Apply Your Understanding" case assignments.	Module B Forum http://shapingoutcomes.wikidot.com/forum:start
Optional Assignments: Complete the Module B "Check Your Understanding" case. Complete Module B "Apply Your Understanding" case. Post your findings and comments in the wiki.	Instructors can easily add new discussion forums where students can post and discuss assignments.

Module C:

Module C	
Primary Activities	**Location**
Complete Module C	http://www.shapingoutcomes.org/course
Keep working on your logic model and post for instructor review. Instructors: Remember that you can have due dates for specific chunks of content in the logic models.	Wiki Module C Logic Model forum
Other activities to consider as time permits:	
Community-building optional activities: Students can continue sharing ideas and comments about their projects. Use content in "Coach" or "Dig Deeper" tabs (in Module C) to generate discussion among class members, allowing them to continue sharing ideas and comments. Talk about the Module C "Check Your Understanding" or "Apply Your Understanding" case assignments.	Module C Forum http://shapingoutcomes.wikidot.com/forum:start
Optional Assignments: Complete the Module C "Check Your Understanding" case. Complete Module C "Apply Your Understanding" case. Post your findings and comments in the wiki.	Instructors can easily add new discussion forums where students can post and discuss assignments.

Module D:

Module D	
Primary Activities	**Location**
Complete Module D	http://www.shapingoutcomes.org/course
Begin working on your logic model and post for instructor review.	Wiki Module D Logic Model forum
Other activities to consider as time permits:	
Community-building optional activities: Students can continue sharing ideas and comments about their projects. Use content in "Coach" or "Dig Deeper" tabs (in Module D) to generate discussion among class members, allowing them to continue sharing ideas and comments. Talk about the Module D "Check Your Understanding" or "Apply Your Understanding" case assignments.	Module D Forum http://shapingoutcomes.wikidot.com/forum:start
Optional Assignments: Complete the Module D "Check Your Understanding" case. Complete Module D "Apply Your Understanding" case. Post your findings and comments in the wiki.	Instructors can easily add new discussion forums where students can post and discuss assignments.

Module E:

Module E	
Primary Activities	**Location**
Complete Module E	http://www.shapingoutcomes.org/course
Complete your logic model and post for instructor review.	Wiki Module E Forum
Post your final logic model for workshop colleagues to review!	Wiki Module E Final Logic Model Forum
Other activities to consider as time permits:	
Community-building optional activities: Students can continue sharing ideas and comments about their projects. Use content in "Coach" or "Dig Deeper" tabs (in Module E) to generate discussion among class members, allowing them to continue sharing ideas and comments. Talk about the Module E "Check Your Understanding" or "Apply Your Understanding" case assignments.	Module E Forum http://shapingoutcomes.wikidot.com/forum:start
Optional Assignments: Complete the Module E "Check Your Understanding" case. Complete Module E "Apply Your Understanding" case. Post your findings and comments in the wiki.	Instructors can easily add new discussion forums where students can post and discuss assignments.

Shaping Outcomes Data Completion Form (sample)

Instructors: Some instructors/facilitators may be asked to assess their course. This is a sample evaluation form.

Directions: Please complete the questionnaire by clicking on the gray text box spaces provided and typing in your response. For items 3 to 5 please click on the appropriate response. Please refer to the definitions on the second page. (Note: The form will be administered online and pre-addressed to the IUPUI Testing Center.)

1. Instructor's Name (optional):
2. Course Number (if any):
3. Term/Year: ☐ Summer 2006 ☐ Fall 2006 ☐ Spring 2007
☐ Summer 2007 ☐ Fall 2007 ☐ Spring 2008
4. Type of SO class: ☐ Embedded-Tutorial ☐ Stand-alone Course
5. Type of Platform: ☐ Oncourse ☐ Wiki
6. How many participants were officially enrolled in the SO class at the start of the second week of class?
7. How many participants began the SO Modules?
8. How many participants did not complete a logic model?
9. How many participants submitted only a "partial" logic model (at least two areas filled in besides the project name and contact information)?
10. How many participants submitted a complete but not passing logic model (one that EITHER receives less than 35 points on the plan section OR averages less than 2.8 on the scope/outcomes section)?
11. How many participants submitted a complete and passing but not good logic model (one that EITHER receives between 35 and 39 on the plan section and between 2.8 and 3.0 on the scope/outcomes section)?

12. How many participants submitted a complete and passing and good logic model (one that receives BOTH a score of 40 or over on the plan section and an average of 3.1 or greater on the scope/outcomes section)?

13. How many students officially withdrew from the SO class after the first week of classes?

14. How many students were administratively withdrawn from your class?

15. How many students obtained an "Incomplete" ("I" grade) from your class by not successfully completing all of the modules and/or not submitting a passing logic model?

16. How many students successfully completed the course satisfactorily (i.e., by completing all of the modules and submitting a "passing" logic model)?

17. Please provide any additional outcome data (e.g., Pass Rate, Failure Rate, etc.) you collected for SO evaluation purposes.

Thank you for your participation!

Submit the Completed Form

Key Terms Defined

Instructors:
These are suggested definition of Key Terms for Shaping Outcomes. Share these with session participants and encourage everyone to adopt this vocabulary for talking about OPBE.

ADMINISTRATIVE TERMS (if you are formally evaluating participants):

- **Enrollment:** Participants that are officially enrolled and present at the start of the SO embedded tutorial/ stand-alone course and continue to the second week of the tutorial/course.

- **Official Withdrawal:** Participants who officially drop the SO tutorial/course after the first week of the tutorial/course. Participants that drop during the first week of the SO tutorial/course will not be counted as enrolled or dropout.

- **Administrative Withdrawal:** Participants who miss more than 50% of their SO class meetings or fail to respond to instructor's e-mail or fail to complete any [or more than one or two] of the "Apply Your Understanding" or other assignments of all Modules.

- **Incomplete:** Participants do not complete the SO class or do not complete all of the OBPE modules or logic model.

- **SO Class Completion:** Participants who complete all of the SO modules and develop a logic model that is rated as "passed" by the instructor.

- **Pass Rate:** Percentage of students completing a logic model that was evaluated by the instructor as "passing".

- **Fail Rate:** Percentage of students not completing a logic model that was evaluated by the instructor as "passing" whether because they dropped the class, never finished a logic model, or finished it but not evaluated as "passing".

Learning from Example: Where to Find Program Ideas

If you haven't come into the *Shaping Outcomes* course with a particular project for your institution in mind, you may find it useful to look at some likely models and THEN check your work with the *Tips and Characteristics* resources.

Here's a list of suggestions on where to find likely projects that fit your institution and your interests:

1. Go to the *Shaping Outcomes* Website at http://shapingoutcomes.org/course and click on **Module A**. Then click on the tab in the upper part of the screen. You will see a short description of sample cases, giving the type of institution and purpose of the project. Click on any case that interests you and read through at least the overview for possible projects to modify or replicate.

2. Look at projects that have been awarded grants by the Institute for Museum and Library Services (IMLS) by going to their Website at http://www.imls.gov . In the upper right-hand corner of that Website you'll see a place to search for current grant applications as well as an archive of successful grant proposals. See what's been funded in institutions like yours. Remember, you can often get advice from successful grantees, so note the contact info of any promising institutions or helpful sounding neighbors of yours.

3. Every state in the U.S. gets grant funds from the Library Services and Technology Act (LSTA), so be sure to look up grant possibilities made available through your State Library: go to http://www.google.com and type in your state's name plus "state library" and hit the "enter" key. Many of these sites post information at least summarizing successful grants.

Note: these Websites will help everyone think of possible projects, but only US libraries and museums are eligible to apply.

Potential Module A Activities:

Instructors: Pass this along to participants or modify it for your own session.

1. Complete Module A of the Shaping Outcomes tutorial:
http://www.shapingoutcomes.org/course

Read through all of the content, and complete either the "library" (for librarians) **or** "museum" (for museum professionals) examples in Module A.

2. Send your project ideas to your instructor for feedback (in wiki FORUMS).
http://shapingoutcomes.wikidot.com/forum:start

3. Share your ideas with other course participants via the Discussion Forums.

4. Say “hello” to everyone in the “Hello Colleagues!” discussion forum.

Potential Module A Assignments:

Instructors: Pass this along to participants or modify it for your own session.

Submit your project ideas to your instructor, who will provide feedback. Ideas can be submitted via the wiki “Module A” forum.

Before submitting your idea(s), read the attached handouts:

- "Characteristics of Programs with Achievable and Measurable Outcomes"
- "Tips: Choosing a Program to Show Outcomes"
- “FAQs about OBPE”
- "Learning from Examples: Where to find program ideas" (located in Module A)

Participants are also invited to share your project / program ideas with others in your course. Use the "Module A" discussion forum to share ideas and get feedback from one another.

Potential Module B Activities:

Instructors: Pass this along to participants or modify it for your own session.

1. Complete Module B of the *Shaping Outcomes* tutorial: http://www.shapingoutcomes.org/course

2. Use the wiki Module B Forum to discuss your understanding of case studies and the concepts that are introduced: 'audience needs', 'assumption', 'target audience', 'stakeholders' and 'outcomes'. Instructors can post definitions of these terms.

3. Complete your logic model for your program (if your program has been approved) using the directions in wiki Module B Logic Model forum. http://shapingoutcomes.wikidot.com/forum:start

   NOTE: Get the logic model worksheet on the Web at <http://www.shapingoutcomes.org/course/model/model.doc >.

   Depending upon how much time your session has to devote to each Module, some instructors assign **parts** of the logic model over several days, leading up to the final, completed logic model at the end of the session.

4. As time permits: Check Your Understanding and Apply your Understanding for Module B:

   Check Your Understanding and Apply Your Understanding gives participants the opportunity to apply OBPE principles and practices to a library or museum case. As time permits, use these to generate discussion.

   Complete either the "library" (for librarians) or "museum" (for museum professionals) examples in Module B. Review the *Children's Museum* **OR** the *Whitney Library* case study materials in *Shaping Outcomes*.

   It's helpful if instructors post definitions of S.O. terminology in a wiki Discussion Forum [See FAQs in APPENDICES for definitions of terms]. For example, participants can be asked to post their stakeholders, and then the instructor can facilitate a discussion about what constitutes a reasonable list of stakeholders (vs. audience or partners).

   In other cases, you may elect to have course participants apply their learning from the tutorial to their own programs instead of making use of the cases in the tutorial.

   Use these cases to learn more about 'audience needs', 'assumption', 'target audience', 'stakeholders' and 'outcomes'.

Potential Module B Assignments:

Instructors: Pass this along to participants or modify it for your own session.

By now, you should have your instructor's approval for a project/program for which you will build a Logic Model.

Working with your own project idea, begin completing your Logic Model form up to and including "For what outcome?" Submit the logic model to your instructor some time during this week.

Use the logic model worksheet. It's available on the Web at:
http://www.shapingoutcomes.org/course/model/model.doc

Potential Module C Activities:

Instructors: Pass this along to participants or modify it for your own session.

1. Complete Module C of the Shaping Outcomes tutorial: http://www.shapingoutcomes.org/course.

   When you have a choice of scenarios (library or museum), look at whichever is relevant to your situation.

2. Complete the Logic Model (or a portion of it) for your program and submit the logic model to your instructor.

   NOTE: Get the logic model worksheet on the Web at
   < http://www.shapingoutcomes.org/course/model/model.doc >

3. Post questions or comments about Module C in the "Module C" forum.

   It's helpful if instructors facilitate discussion by having participants use a wiki forum to talk about outputs, outcomes, audience needs, solutions statements, and other OPBE terms and concepts.

4. (Optional as time permits:) Comment on the case studies in the S.O. tutorial.

Potential Module C Assignments:

Instructors: Pass this along to participants or modify it for your own session.

Working with your own project/program, fill in the Logic Model form including "Outputs" and up to "Outcomes and Indicators."

Submit the logic model to your instructor for feedback.

Potential Module D Activities:

Instructors: Pass this along to participants or modify it for your own session.

1. Complete Module D of the *Shaping Outcomes* tutorial: http://www.shapingoutcomes.org/course

HINT: This is the toughest module in the course, but really try to get something posted on time. Just be prepared to revise.

2. Complete your logic model, and submit the logic model to your instructor for feedback. (Submitting your work on-time, even if you're not confident, will get you helpful instructor feedback in time for you to make revisions before you submit your final draft.)

3. Use the Module D forum to encourage participants to talk about their programs. For example, you can ask participants to share comments about stating 'measurable outcomes', and the differences between 'outcomes' and 'indicators'.

4. (Optional as time permits:) Complete either the "library" (for librarians) or "museum" (for museum professionals) examples in Module D. Comment on the Whitney Library Logic Model in the discussion forum.

Potential Module D Assignments:

Instructors: Pass this along to participants or modify it for your own session.

1. Working with your own project/program, complete the Logic Model. Be sure to submit your logic model on-time so that your instructor can provide feedback before the final draft is due.

2. (Optional exercise, as time permits): Fill in a blank Logic Model template for the Whitney Library for at least one Outcome and Indicator, based on the background posted in Module D as a Resource. Then compare what you wrote with what's provided in the Whitney Logic Model in Cases in the Shaping Outcomes materials. Suggestion: keep open on your screen the Whitney Case (in the course materials) plus the Logic Model form you filled in plus this Discussion Forum.