

# The Planning Process in Youth Services:

## Using Output Measures in Evaluating Services

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**D**iscussion of planning theory and descriptions of the planning process can be found in the professional literatures of business management, public administration, and social psychology. Librarianship has borrowed generously from these disciplines in applying the theory to library operations. Another perspective about professional origins is presented by Molz who cites foundation "in two spheres of national life: the socio-economic planning engendered by government and the planning which has its origins in management and theory techniques used in the private sector."<sup>1</sup>

A landmark work that exemplifies the merger of theory and applications for library environments is *Planning and Role Setting for Public Libraries: A Manual of Options and Procedures*, which was prepared by a group of experts for the Public Library Development Project (PLDP) and published by the American Library Association in 1987.<sup>2</sup> PLDP was organized by the Public Library Association for the purpose of assisting public libraries in planning, measurement and evaluation.

Any viable planning process recognizes the value of a measurement phase. Baker and Lancaster state that evaluation is not an isolated, sporadic event, but rather an integral part of the planning cycle.<sup>3</sup> In a very rudimentary description of the process linking the two activities, I submit a preliminary model called PIE which is composed of three primary components: Planning, Implementation, Evaluation. (See Figure 1.) Planning is undertaken to provide a foundation for making choices.<sup>4</sup> Options are explored and executed in the second phase of Implementation. In the final phase of Evaluation, determination and assessment of levels of success are confirmed. Based on the results of evaluative activity, the planning

process is initiated and continues in its cyclic mode. The presentation for the model at this stage of development is most basic and does not reflect the distinctive activities which comprise each of the phases.

A companion to the *Planning* manual, *Output Measures for Public Libraries*, was published in 1987 and delineated expected library services to be measured.<sup>5</sup> The impetus for the approach of this guide was to provide libraries with assistance in measuring performance in terms of library services or outputs instead of library resources or inputs. Of the eight public library roles identified in the *Planning* manual, only one specifically addressed children's services. It immediately was apparent that the documents' (including the companion volume, *Output Measures*) pertinence to children's librarianship was negligible at best.

In an attempt to establish some relevance, Robin Gault and the Public Library Association Committee on Service to Children published suggestions on how the manual and its attendant output measures guide could be used to provide direction for measuring children's services. The authors emphasized the need for data collection and analysis in categories of Community Profile, Library Statistics, Survey Data, and Relationships with Other Agencies.<sup>6</sup> Each category of data is accompanied by questions recommended to facilitate the process of information gathering. Eventually, in 1992, the definitive planning document for children's services, *Output Measures for Public Library Service to Children: A Manual of Standardized Procedures*, was published as a part of PLDP.<sup>7</sup>

### Planning and Measurement in School Library Media Programs

Planning is a well-established and fundamental activity which permeates all as-

pects of librarianship. What is especially important to remember is that those in youth library services are committed to a group of users who are the same in both the school and public library settings. What does distinguish professional approaches to meeting user needs is the nature of the environment. The child or young adult is also a student: the constant variable in this scenario who visits the public library to complete homework is the same person who received the assignment earlier in the day from the classroom teacher. Barriers among professional ranks which evolve because of distinctive and intractable "role ownership" only serve to minimize and erode the more powerful collective impact (public) youth librarians and school media coordinators can have in meeting the needs of the youthful client base.

The field of school media librarianship has likewise embraced the subject of planning with a vigor comparable to that of public librarians. It is written in *Information Power: Guidelines for School Library Media Programs* that planning is central to every facet of program development and implementation ... and is subject to ongoing evaluation and revision.<sup>8</sup> Measurement is linked to planning and is an enumeration of the process components which include Preparation for Planning; Defining Program Mission, Goals and Objectives; Data Collection; Implementation; and Evaluation of the Library Media Program.<sup>9</sup>

Loertscher, in reiterating the importance of evaluating school library media programs, has identified four general areas which can be measured:

**Area 1:** Goals and Objectives (Are the goals worthy ones?)

**Area 2:** Resources (Are they sufficient enough to operate an effective program?)

**Area 3:** Operations (Do routines run smoothly and efficiently?)

**Area 4: Worth/Results/Impact** (does the program make a difference in the way teachers teach and students learn?)<sup>10</sup>

He urges school library media program directors to carefully consider criteria for selecting instruments and identifying concordant measures to provide a comprehensive evaluative overview of the program.

With background constituted, the focus of this article is the examination and recapitulation of *Output Measures for Public Library Service to Children*. Although the intended audience for this publication is public youth librarians, most measures are applicable for school library media programs. They can be adapted as needed. One interesting article about children's services published in 1990, pre-dating *Output Measures*, details a public library's use of selected measures to provide insight into library service to middle school students, an area of service that previously had been considered a problem.<sup>11</sup> This article about Bethlehem (Pennsylvania) Area Library not only illustrates a connection of the two library environments through the student-patron, but also describes an approach to modifying and using measures that were not specifically designed for children's services.

### Using the Output Measures

In the formative document, *Planning and Role Setting*, phases of the planning process are listed:

- Planning to Plan
- Looking Around
- Developing Roles and Missions
- Writing Goals and Objectives
- Taking Action
- Writing the Planning Document
- Reviewing Results.

Walter in *Output Measures for Children's Services* notes that the measures are designed to be used at several steps of the planning process, and suggests that the measures are most useful when combined with a planning process.<sup>12</sup>

Significant factors to consider in preparation for managing the measurement process are (1) the library as an organization — its current practice of evaluation; (2) the organizational structure, including how children's services relate to other departments; (3) resources, including staff time; (4) organizational culture, including prevailing management styles; and (5) the community, including any contextual trends and conditions that have potential to impact delivery of services.<sup>13</sup>

It is critical to determine *which* of the output measures will be implemented. No library is expected to use all of the measures. Walter proposes that a starting point for deliberations is the planning and role-setting process if the library has undertaken such. An alternative is consideration of mission, goals, and objectives followed by identification of the measures that will produce data to help monitor the progress toward the objective.<sup>14</sup>

*Children's Population of Legal Service Area* is the basic element and is used to calculate per capita figures. Parameters of the element set the definition of "child" as fourteen years and under who lives in the *Legal Service Area* of a public library. The fifteen measures are organized in six categories and will be defined and explained here as presented in the manual. Precise directions for data collection and interpretative uses accompany discussion of each measure. Readers are advised to consult the manual for special needs.

### Category 1: Library Use Measures

- A) **Children's Library Visits per Child** — Number of visits by people age fourteen and under during the

year in the community served. *Count people age fourteen and under entering the building one summer week and one winter week to project for the year.*

- B) **Building Use by Children** — Average number of people age fourteen and under in any part of the library at any one time. *Calculate means from sample tallies of number of people age fourteen and under in the library.*
- C) **Furniture/Equipment Use by Children** — Proportion of average time that a particular type of furniture or equipment anywhere in the library is being used by a person age fourteen and under. *Divide the number of items in use by the number of items available in two sample periods (summer and winter weeks) to project for the year.*

### Category 2: Materials Use Measures

- A) **Circulation of Children's Materials per Child** — Average circulation of materials per person age fourteen and under in the community served. *Determine the annual circulation of children's materials and divide by children's population of the service area in automated system or by tally.*
- B) **In-Library Use of Children's Materials per Child** — Number of children's materials used in the library per person age fourteen and under in the community served. *Determine use in two sample periods of summer and school year with no reshelving and divide by children's population of legal service area.*
- C) **Turnover Rate** — Average circulation per children's volumes owned. *Determine annual circulation of children's materials and divide by entire children's holdings.*

### Category 3: Materials Availability Measures

- A) **Children's Fill Rate** — Percentage of successful searches for materials in any part of the library collection by users age fourteen and under and adults acting on behalf of children. *Calculate the number of successful searches in two sample periods and divide by all searches.*
- B) **Homework Fill Rate** — Proportion of searches for information and/or library materials to assist with homework by users age fourteen and under and adults acting on their behalf that are successful in a sample period. *Divide the number of successful searches for materials by all searches.*
- C) **Picture Book Fill Rate** - Percentage of successful searches for picture books by all library users in a sample period. *Divide the number of successful searches by all searches.*

### Category 4 - Information Services

- A) **Children's Information Transaction per Child** — Number of transactions per person age fourteen and under or adults acting on their behalf in the community served. *Divide the annual number of transactions based on two one-week sample periods (projected) by the children's population of the legal service area.*
- B) **Children's Information Transaction Completion Rate** — Percentage of information transaction by persons age fourteen and under or by adults acting on their behalf that are completed successfully on the same day that the question is asked, in the judgment of the librarian. *Divide the number of transactions*

completed by the total number of transactions based on two one-week sample periods.

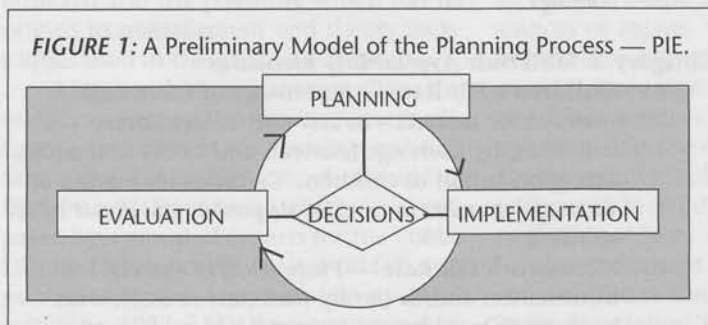
### Category 5: Programming

- A) **Children's Program Attendance** — Attendance by all ages at children's programs per person age fourteen and under in the population served. *Count the audience at all programs to determine annual program attendance and then divide by the children's population in the legal service area.*

### Category 6: Community Relations

- A) **Class Visit Rate** — Number of visits by school classes to the library relative to the number of school classes in the community. *Count all class visits to the library and divide by the number of classes in the legal service area (based on a census of the school level classes in the community).*
- B) **Child Care Center Contact Rate** — Number of contacts between the library and child care centers relative to the number of centers in the community. *The number of all annual contacts is divided by the number of centers in the community.*
- C) **Annual Number of Community Contacts** — Annual number of community contacts made by library staff responsible for service to children. *Keep a record of all contacts and total.*

Output measures should not exist in isolation. They must be bound explicitly to goals and objectives which emanate from the planning process. For an illustration of this connection, (See Figure 1.)



Planning is decision-based. That is, at every juncture, decisions are made and serve as a means to facilitate the process. During the **Planning** phase, staff must clarify purposes for planning and determine expected outcomes. Next, an assessment of community needs is conducted in light of trends and conditions which may affect provision of library services. Following data collection and analysis, identified library roles become the basis for a mission statement. Goals and objectives further define each library role. Any goals and/or objectives of children's services must be consistent with the library mission.

Example: Your children's department has selected Popular Materials Center as a role. Your goal is to insure availability of popular materials to all members of your community. One of your objectives might be to increase the availability of requested picture books by fifty percent.

**Implementation** begins as the library staff decides how best to meet the goals/objectives. At this point, the output measures are developed based on information discerned in the planning phase.

Example: To meet your objective to increase the availability of requested picture books by fifty percent, you decide to make

the purchase of popular picture books a budget priority this year. You also might increase the number of retrospective titles purchased. Before doing anything, you decide to measure Picture Book Fill Rate to see how many of your patrons are getting the picture books they want when they want them.

In **Evaluation**, results of the data collection are analyzed to determine the level of progress toward meeting the goals/objectives upon which the output measures are based. Roles and goals and objectives are reconsidered for their relevance to the mission, and the process of planning is begun again.

Example: After prioritizing the purchase of picture books for one year, you again measure picture book fill rate. Compare your results to the results of the year before. Has the fill rate increased, decreased, or stayed the same? Did you meet your objective of increasing the availability of requested picture books by fifty percent? Using this information, reconsider your goals and objectives and start making plans for the coming year.

Ultimately, the purpose of using output measures is to provide some indication of what the library gives to its community. They evolve as the result of assiduous consideration of mission, goals, and objectives which serve to address the information needs of the community. It is the professional responsibility of the youth librarian in assuming the administrative and managerial roles as defined in *Competencies for Librarians Serving Children in Public Libraries* to participate in all aspects of the library's planning process, to represent and support children's services, and to set long- and short-range goals, objectives, and priorities.<sup>15</sup>

### References

- <sup>1</sup> Kathleen Redmon Molz, *Library Planning and Policy Making: The Legacy of the Public and Private Sectors* (Metuchen, NJ: Scarecrow, 1990), 21.
- <sup>2</sup> Charles R. McClure et al., *Planning and Role Setting for Public Libraries: A Manual of Options and Procedures* (Chicago: American Library Association, 1987).
- <sup>3</sup> Sharon Baker and F. Wilfred Lancaster, *The Measurement and Evaluation of Library Services*, 2d ed. (Arlington, VA: Information Resources Press, 1991), 5.
- <sup>4</sup> McClure et al., 4.
- <sup>5</sup> Nancy A. Van House et al., *Output Measures for Public Libraries: A Manual of Standardized Procedures*, 2d ed. (Chicago: American Library Association, 1987).
- <sup>6</sup> Robin R. Gault, "Planning for Children's Services in Public Libraries," *Public Libraries* 25 (Summer 1986): 61-62.
- <sup>7</sup> Virginia A. Walter, *Output Measures for Public Library Service to Children: A Manual of Standardized Procedures* (Chicago: American Library Association, 1992).
- <sup>8</sup> American Association of School Librarians and Association for Educational Communications and Technology, *Information Power: Guidelines for School Library Media Programs* (Chicago: American Library Association, 1988), 44.
- <sup>9</sup> *Information Power: Guidelines for School Library Media Programs*, 45-48.
- <sup>10</sup> David V. Loertscher, *Taxonomies of the School Library Media Program* (Englewood, CO: Libraries Unlimited, 1988), 207.
- <sup>11</sup> Cynthia M. Wilson, "Output Measures Identify Problems and Solutions for Middle Schoolers," *Public Libraries* 29 (January/February 1990).
- <sup>12</sup> Walter, 8.
- <sup>13</sup> *Ibid.*, 14-15.
- <sup>14</sup> *Ibid.*, 15.
- <sup>15</sup> Association for Library Service to Children, *Competencies for Librarians Serving Children in Public Libraries* (Chicago: American Library Association, 1989).