

A blurred photograph of a subway tunnel. The image shows the interior of a tunnel with a concrete wall on the left and a track on the right. A train is moving through the tunnel, creating bright, horizontal light trails that stretch across the frame. The overall scene is dark, with the primary light source being the train's headlights and interior lights.

# Assessment Project Management in the Real World

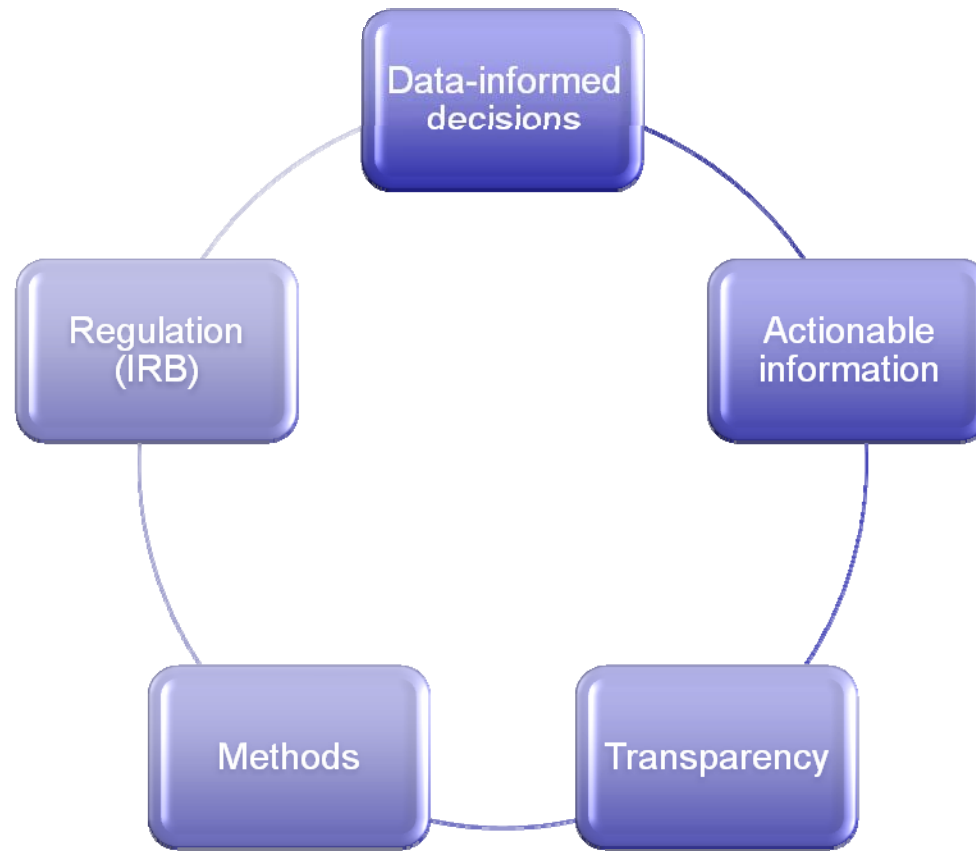
**Hour Three:**  
Implementation, Technology, IRB, and Challenges



# Implementation

# Creating a culture of assessment

- Definitions and clarifications
- Encourage and support staff
- Making assessment part of every project



# Creating Data Transparency

- File storage and data centers
  - “Where should we put our results?”
  - “Who can view this data?”
  - “Why do you need me to submit this form?”
  - What do we need from you, and what do you need from us?
- Data audit
  - What data do we have?
  - Where did we put it?
  - What happened to \_\_\_\_\_ when \_\_\_\_\_ left the library?

You'll be surprised to find the data that staff have stored on their workstations!





Technology



# Project Management Software



What **functionality** do you need?

What **infrastructure** do you already have?

Who can help **implement? Maintain? Train?**

# Project Management Software

- **Basic functionality:** Gantt charts, task lists and assignments, communication
- **Tracking:** milestones, dependencies, goals
- **Document repositories:** tracking, versions
- **Calendaring:** timelines, event / meeting planning, appointments
- **Other functions:** billing, reminders, time tracking, whiteboards



## Latest activity across your projects

### Upcoming Milestones

#### Due in the next 14 days

Sat	Sun	Mon	Tue	Wed	Thu	Fri
TODAY	Mar 15	16	17	18	19	20
21	22	23 <a href="#">Conduct the LibQual+ Survey</a>	24	25	26	27

### Columbia University Libraries — LibQual+ 2009

Milestone	<a href="#">Launch public website</a>	Completed by Joanna D.	TODAY
To-do	<a href="#">Fill out post-survey questionnaire thing (Fill out Institution Profile)</a>	Assigned to Anyone	12 Feb
To-do	<a href="#">Enter Demographic Data (Fill out Institution Profile)</a>	Assigned to Anyone	12 Feb
To-do	<a href="#">test-survey! (Fill out Institution Profile)</a>	Completed by Jennifer R.	12 Feb



### Columbia University Libraries — AWG Mission Statement

Writeboard	<a href="#">AWG Mission Statement</a>	Updated by Jennifer R.	4 Feb
Message	<a href="#">AWG Mission Statement</a>	Posted by Jennifer R.	29 Dec
Writeboard	<a href="#">Example Mission Statements</a>	Updated by Jennifer R.	18 Sep
Writeboard	<a href="#">Re: AWG brainstorming session</a>	Comment by Jennifer R.	18 Sep
Message	<a href="#">Mission Statement</a>	Posted by Jennifer R.	9 Sep

### Columbia University Libraries — Assessment Data Cataloging

Milestone	<a href="#">Profiles complete in "data data data" section of the Assessment Center</a>	Completed by Jennifer R.	16 Oct
To-do	<a href="#">ILL Stats (Update the data profile on the Assessment Center)</a>	Completed by Jennifer R.	16 Oct
To-do	<a href="#">Reference Stats (Update the data profile on the Assessment Center)</a>	Completed by Jennifer R.	16 Oct
To-do	<a href="#">I-deck Stats (Update the data profile on the Assessment Center)</a>	Completed by Jennifer R.	16 Oct
To-do	<a href="#">Borrow Direct Statistics (Update the data profile on the Assessment Center)</a>	Completed by Jennifer R.	16 Oct

### Your global feeds [\(read me first\)](#)

-  [Global RSS Feed](#): Be notified about major activity across all your projects.
-  [Global iCalendar](#): Get milestones from all your projects in a single iCalendar feed.

## Your projects

### Columbia University Libraries

- [Assessment Data Cataloging](#)
- [AWG Mission Statement](#)
- [LibQual+ 2009](#)

Milestones,  
whiteboards,  
messages, and  
to-do lists

RSS feeds



# Project Management Software

- **BaseCamp, Zoho, web-based solutions**  
**Functionality:** define milestones and to-do lists, assign tasks, create timeline, wikis, track communication  
**Pros:** easy to use, collaborative, truly project management, reasonably priced  
**Con:** hosted solution (exit strategy!)
- **Trac, JIRA, and other tracking devices**  
**Functionality:** initiate tasks, group tasks by function or project, assign tasks, generate reports, view roadmaps  
**Pros:** easy setup, small learning curve  
**Con:** made for technology “bug tracking”

# Project Management Software

- **Microsoft Project, Other PM Applications**

**Functionality:** everything and the kitchen sink!

**Pros:** full features, robust, fast, extensible

**Cons:** can be expensive, hard to share data without add-ons

- **Wikis**

**Functionality:** communication, documentation, document sharing

**Pros:** easy to set up, use, fast, collaborative, FREE!

**Cons:** few bells, even fewer whistles

A row of yellow rubber ducks is shown against a dark background. The ducks are arranged in a line, with the one in the foreground being in sharp focus and the others becoming increasingly blurred as they recede into the background. The ducks have black eyes and red beaks. A semi-transparent white banner with a fine grid pattern is overlaid across the middle of the image, containing the text "Institutional Review Boards" in a teal color.

# Institutional Review Boards

# Institutional Review Boards...?

- A short history...
- Every IRB is different
- Practical, reasonable goal:  
**exemption from IRB**
  - Your project does no harm
  - Your project provides no research benefit
  - Your project does not collect potentially damaging information
  - Your project will not involve minors, prisoners, or other protected classes



# Institutional Review Boards...?!

All large and small universities have these boards, particularly if your university is connected to a medical school or hospital

**IRBs can help you plan your assessment goals** (even if they're sometimes a little inconvenient...)

# Institutional Review Boards... 😊

If your project leads to a publication or presentation:

- *Please* submit a protocol
- *Please* be sure to document everything in a transparent way
- *Please* ask your client/colleagues if they wish to publish at the onset of the assessment

# IRB Facets

## Protocols often require:

- Principal Investigator
  - Type of research
  - Exemption declaration
  - Research questions
  - Scientific Abstract
  - Lay Abstract
  - Subject parameters
    - Number of participants
    - Age
    - Gender
    - Ethnicity
  - Subject justification
  - Consent forms
  - Funding information
  - Compensation justification
- Study Description:
    - Purpose & Rationale
    - Design and statistical procedures
    - Methodology
    - Drugs & devices (!)
    - **Study Questionnaires**
    - Study Subjects
    - Recruitment materials
    - Confidentiality
    - Potential Risks
    - Potential Benefits
    - Alternatives

Letter of permission from Dean, Provost, IRB  
Chair



# Challenges





# Activity 7

## Challenges

# Methodology Challenges

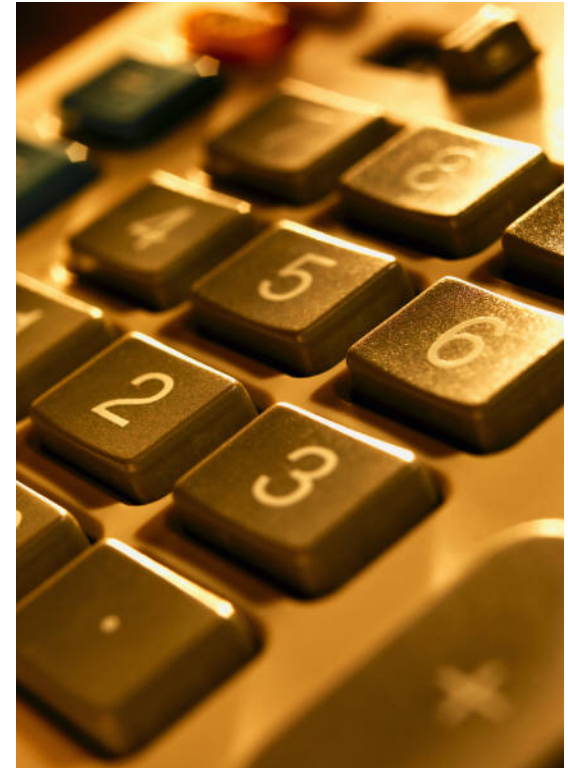
The method won't  
gather the information  
you need

The method is already  
set in place before  
you become part of  
the project



# Data Challenges

- There isn't enough data
- The data was poorly gathered
  - Incomplete
  - Unclear origins
  - Resulting from poorly constructed or biased tools
- The data doesn't fit the questions being asked
- The data is:
  - Lost, missing, or on someone's hard drive
  - Locked in proprietary format



# More Challenges...

- Coming into a project too soon
  - Unsure direction
  - **“Unactionable” items:** *“That would be really interesting”*
- Coming into a project too late
  - Too late to gather data
  - Decisions often already made
- Staff are wary of assessment







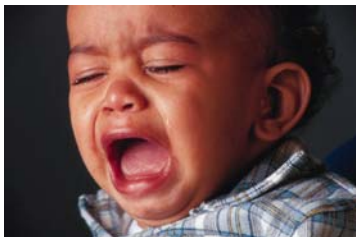
**5 Minute Break**



# So, what's an assessment project manager to do?



Solutions for the real world





# Understand the Project Team





**Understand Your Questions**

The background features a blue folder and a green folder, both with white labels that include the text 'P-NSEL'. A circular object, possibly a lens or a light fixture, is visible in the upper center. The entire scene is set against a dark, almost black background.

Understand the Methodologies



A black and white photograph of a chessboard. A hand is visible in the lower right, moving a white chess piece. The board is in the foreground, and other pieces are blurred in the background. A semi-transparent white box with a fine grid pattern is overlaid in the center, containing the text "Understand the Problems".

**Understand the Problems**



**Thank you!**

Jennifer Rutner - [jenrutner@columbia.edu](mailto:jenrutner@columbia.edu)  
Joanna DiPasquale - [jd2481@columbia.edu](mailto:jd2481@columbia.edu)

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