Calidad en la Educación

n.25, 2006

SISBI - BIBLIOTECA
SIGNATURA: C-11-1

ÍNDICE

Presentación 11
Nelly Pinto de la Paz

MONOGRÁFICO

Indicadores y estándares internacionales de calidad universitaria 15
Rodrigo Fernández
Yerko Martínez
Nicolás Velasco

Estudio global de los *rankings* universitarios 31
Alex Usher
Massimo Savino

Nueva metodología para un *ranking* de universidades chilenas 55
Patricio Meller
David Rappoport

La difícil tarea de clasificar universidades 79
Andrés Bernasconi

El valor de los *rankings* de instituciones de educación superior 97
Orlando Poblete

Idoneidad de los *rankings* universitarios 107
Aldo Valle

Calidad en la Educación

n.25, 2006

ESTUDIOS

SECRETARÍA TÉCNICA CONSEJO SUPERIOR DE EDUCACIÓN

Análisis exploratorio entre los censos de 1992 y 2002 respecto del nivel educacional de la fuerza laboral en Chile 127
Cecilia Ibarra

La voz de los usuarios. Reclamos contra las instituciones de educación superior 153
Cecilia Dooner
Mario Guevara
Felipe Lagos
Paula Mena

OTROS

Propuesta de un modelo de evaluación para cursos en modalidad a distancia 187
Osvaldo Aguilera

Universitarios y lectura: análisis cuali-cuantitativo del uso, accesibilidad y valoración de los libros 213
Claudia Gilardoni

Mujeres en la alta dirección de educación superior: posibilidades, tensiones y nuevas interrogantes 241
Mahia Saracostti

MISCELÁNEA

Aseguramiento de la calidad y desarrollo de la educación superior privada: comparaciones entre las experiencias de Argentina, Chile y Uruguay 261
Pablo Landoni
Carlos Romero

Calidad en la Educación

n.25, 2006

Las universidades desde la Teoría de los Sistemas Sociales 283
Nelson Paulus

Selección de tesis de pre y posgrado 2005-2006 315

Publicaciones recibidas 2006 320

Ediciones de universidades chilenas 2006 321

Reference Librarian

n.95 / 96, 2006

Assessing Reference and User Services in a Digital Age

The Reference Librarian
Numbers 95/96

SISBI - BIBLIOTECA
SIGNATURA: R-6-1

CONTENTS

Preface xxi

Introduction 1
Eric Novotny

LIBRARY CASE STUDIES AND RESEARCH RESULTS

Benchmarking Librarian Performance in Chat Reference 5
Loree Hyde
Caleb Tucker-Raymond

Librarians participating in Oregon's collaborative statewide virtual reference project used an analysis of chat reference transcripts to evaluate librarian performance.

KEYWORDS. Virtual reference, chat reference, evaluation, assessment, transcripts

Same Questions, Different Venue: An Analysis of In-Person and Online Questions 21
Joseph Fennewald

This study applied traditional categories used for classifying questions presented at reference desks to online reference services. Questions presented at Penn State's subject libraries were classified as 'Where Is,' 'Troubleshooting,' 'Policy and Service,' and 'Reference.' Definitions and examples were provided for the...

Reference Librarian

n.95 / 96, 2006

there were differences in the proportion of questions by categories. This suggests that services have similar, yet distinct, functions and that the type of questions submitted differ between in-person and online and also between e-mail and chat.

KEYWORDS. Question analysis, classification schemes, reference services, e-mail reference, virtual reference

Listening to Our Users: System Migration and the Evaluation of Web-Based Library Services 37

Laurie Probst
Michael Pelikan

At Penn State, a "Tell Us What You Think" user feedback button on the Libraries home page provided a convenient mechanism for users to respond to our system migration and the changes they saw in The CAT, our library catalog. The immediate impact of the new system on our users was dramatic, and included strong criticism from a small, but vocal, minority. Within a few months, however, the complaints and comments about the new catalog moderated and the majority of the e-mail traffic coming into the library switched into questions about library services and requests for assistance.

KEYWORDS. Descriptors, system migration, evolution of user services, user studies, use studies, assessment and evaluation, MIS in libraries

Evaluating Virtual Reference from the Users' Perspective 53

Kirsti Nilsen
Catherine Sheldrick Ross

This article discusses the evaluation of virtual reference services from the user perspective. It is one outcome of a long-term research project, The Library Visit Study, which has been conducted in three phases at the University of Western Ontario for more than a decade. These studies have identified the need for, and essential components of, reference interviews and good reference behaviors. The third phase of this research focuses on the factors that make a difference to the users' satisfaction with their virtual reference experience and whether these are the same or different from the ones we identified as important in face-to-face reference. An examination of user accounts of virtual reference transactions indicates that the reference interview has almost disappeared. Among the reasons identified for staff failure to conduct reference interviews in the virtual environment are: the nature of written vs. spoken interaction; the librarian's perceived need to respond quickly in this environment; and the rudimentary nature of the forms used in e-mail reference. The article includes a list of behaviors that users identified as either helpful or unhelpful and concludes with some implications of the research for good virtual reference service.

KEYWORDS. Virtual reference, evaluation, reference interview, library user studies, field research

Reference Librarian

n.95 / 96, 2006

Balancing Statewide and Local Digital Reference Service 81
Ruth Vondracek

As digital and chat reference services become established as another way to do business, many libraries juggle the delivery of consortial and local virtual reference services. Balancing services without overtaxing staff and resources presents a number of challenges. How, for example, do libraries staff more than one chat reference service in addition to traditional services? Or more critically, how are subject specialists used to their greatest advantage in a multi-type library service? This article explores the benefits and issues of offering service at the statewide and local level based on OSU's experience and describes how OSU responded to these issues.

KEYWORDS. Digital reference, chat reference, virtual reference, digital reference consortia, statewide reference services, multi-type library services, Oregon State University Libraries, L-net, Answerland

STANDARDS AND METHODS FOR EVALUATING VIRTUAL REFERENCE

Looking at the Bigger Picture: An Integrated Approach to Evaluation of Chat Reference Services 99
M. Kathleen Kern

Virtual reference offers some unique new opportunities for evaluation due to the richness of the transcripts and other automatically collected data. To put evaluation of virtual reference into context, however, libraries should view and evaluate virtual reference as part of the whole of a library's reference service. Holistic evaluation pursues an integrated approach to evaluating the total of a library's reference service.

KEYWORDS. Evaluation, reference services, virtual reference, e-mail reference, chat reference, integration

Budget Planning and Performance Measures for Virtual Reference Services 113
Andrew Breidenbaugh

The Tampa-Hillsborough County Public Library, as a county government agency, is required to follow a specific budget planning process in order to obtain funding for library programs and services. One tool of this planning process–the "decision unit"–requires advanced planning and continued evaluation of potential and existing library services. Prior to receiving funds for any new service, performance measures must be established in order to measure the success of the service in relation to the public money invested. This article will look at the evaluation process built into the funding of the library's participation in a statewide virtual reference service and the implications for continuation and/or expansion of this service based on continued assessment.

KEYWORDS. Evaluation, assessment, digital reference, virtual reference, reference services

Reference Librarian

n.95 / 96, 2006

VET: The Virtual Evaluation Toolkit 125
Buff Hirko

Between October 2003 and July 2004, the Statewide Virtual Reference Project (a Washington State Library initiative funded by LSTA) developed the Virtual Evaluation Toolkit, or VET. The purpose of VET was to help libraries improve virtual reference services, with resulting increased awareness, usage, and customer satisfaction. VET includes three levels of evaluation tools with information on their implementation and examples of the use of results, along with a generic final report based on three test site evaluations (an academic, public, and special library). The complete manual is available on the Web in order to provide practical and meaningful tools and recommendations that encourage libraries to use them and also to report on their use.

KEYWORDS. VET: Virtual Evaluation Toolkit, virtual reference, service evaluation, evalution criteria, checklists, Washington State Virtual Reference Project

Assessing Digital Reference and Online Instructional Services in an Integrated Public/University Library 149
Lauren Miranda Gilbert
Mengxiong Liu
Toby Matoush
Jo Bell Whitlatch

In spite of the explosion of interest in virtual reference and instruction, assessment of digital reference remains relatively uncharted territory in the library literature. What standards exist for online reference and instruction and how can they be used to assess the innovative new merged online reference environment at the Dr. Martin Luther King, Jr. Library? Led by co-unit heads from the former San Jose Public Library Main Branch and the San Jose State University Clark Library, the merged reference unit is a unique testing ground for perceived differences between public and academic reference service. Evaluation of both the online and the live merged reference environment is crucial and will be necessary to determine what is working and what is not. This paper will discuss plans for current and future assessment of digital reference including e-mail, live online reference, and online instruction.

KEYWORDS. Digital reference, assessment, online instruction, merged reference, joint libraries, e-mail reference, live online reference, QandACafe, 24/7 reference, TILT (Texas Information Literacy Tutorial)

Costing Reference: Issues, Approaches, and Directions for Research 173
Melissa Gross
Charles R. McClure
R. David Lankes

The Assessing Quality in Digital Reference project is a first step toward understanding the cost of digital reference services in libraries. This article presents three mea-

Reference Librarian

n.95 / 96, 2006

sures isolated by project participants as being most useful for their immediate needs: total cost of providing digital reference service, the cost of digital reference service as a percent of the total reference budget, and the cost of reference as a percent of the total library or organizational budget. In addition, it reviews selected outstanding issues in the ongoing question of how to determine the cost of reference services in libraries and offers direction for further study toward a general cost model for information services.

KEYWORDS. Digital reference, cost studies, information service evaluation, reference services standards

ASSESSING LIBRARY INSTRUCTION
IN AN ONLINE ENVIRONMENT

Instruction in a Virtual Environment:
Assessing the Needs for an Online Tutorial 187
Wendy Holliday
Sharolyn Ericksen
Britt Fagerheim
Rob Morrison
Flora Shrode

In 2002, librarians at the Utah State University (USU) Libraries were awarded a grant to develop online tutorials. The major design challenge was to create tutorials specific to USU resources and students, including distance learners, while also making them flexible so that other Utah colleges and universities can adapt them for their own needs. The tutorials also needed to address the information behavior of a new generation of students accustomed to using computers and the Internet. While recent studies have begun to address some gaps in our knowledge of the information behavior of the Web Generation, we conducted a needs assessment to help us create a tutorial that more accurately addresses the existing knowledge and behavior of undergraduates at USU. We used multiple methods to determine the learning needs of our audience and to provide guidance for the design process.

KEYWORDS. Online tutorials, needs assessment, undergraduate students, information behavior

Virtual Reference [illegible]

to patrons during VRS sessions is different than that provided during face-to-face reference. The Penn State VRS was used as a case study in this assessment. An analysis of a sample of archived Penn State VRS transcripts was conducted to assess the nature and quantity of instruction provided based on the presence of defined instructional elements incorporated in the sessions. The paper discusses

Reference Librarian

n.95 / 96, 2006

the similarities and differences in approach to instruction during VRS and face-to-face reference, and how these relate to overall instructional services in academic libraries. The paper also reviews findings of some similar studies cited in the literature. The findings of this study indicate that there is a significant amount of instruction taking place during both face-to-face reference and VRS. Furthermore, the approach to instruction in both reference environments is very similar. However, the VRS system in use at Penn State (LSSI Virtual Reference Toolkit), because of its technological features and capability, has facilitated new and unique enhancements to instructive reference that are not available in face-to-face reference.

KEYWORDS. Virtual reference service–assessment, digital reference service–assessment, VRS–instruction, reference services–instruction, reference services pedagogy, e-reference

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SISBI - BIBLIOTECA
SIGNATURA: R-3

Revista de Educação PUC-Campinas

SUMÁRIO *CONTENTS*

Editorial .....

ARTIGOS / *ARTICLES*

O Mestrado Profissional: mais um Equívoco da Política Nacional de Pós-Graduação
The Professional Masters Program: one more Mistake in National Policy for Post-Graduation
Antônio Joaquim Severino 9

Trilhas Investigativas: Localizando a Inovação na Prática Pedagógica da Universidade
Investigative Paths: Locating Innovation in the Pedagogical Practice of the University
Maria Isabel da Cunha & Mari Margarete dos Santos Forster 17

Inclusão Educacional no Brasil: Limites e Possibilidades
Educational Inclusion in Brazil: Limitations and Possibilities
José Luís Sanfelice 29

Cultura Escolar por meio de Concepções e Saberes em Projetos de Formação de Professores
Developing School Culture by Means of Conceptions and Knowledge in Teacher Formation Projects
Rosa Lydia Teixeira Corrêa 41

A Contribuição dos Métodos Sociológicos para a Compreensão da Educação
The Contribution of the Sociological Method to Understanding Education
Olinda Maria Noronha 53

Avaliação, Currículo e História no Ensino Médio: um Campo de Relações
Evaluation, Curriculum and Teaching History in Middle Education: a Field of Relations
Selva Guimarães Fonseca & Zeli Alvim de Oliveira 75

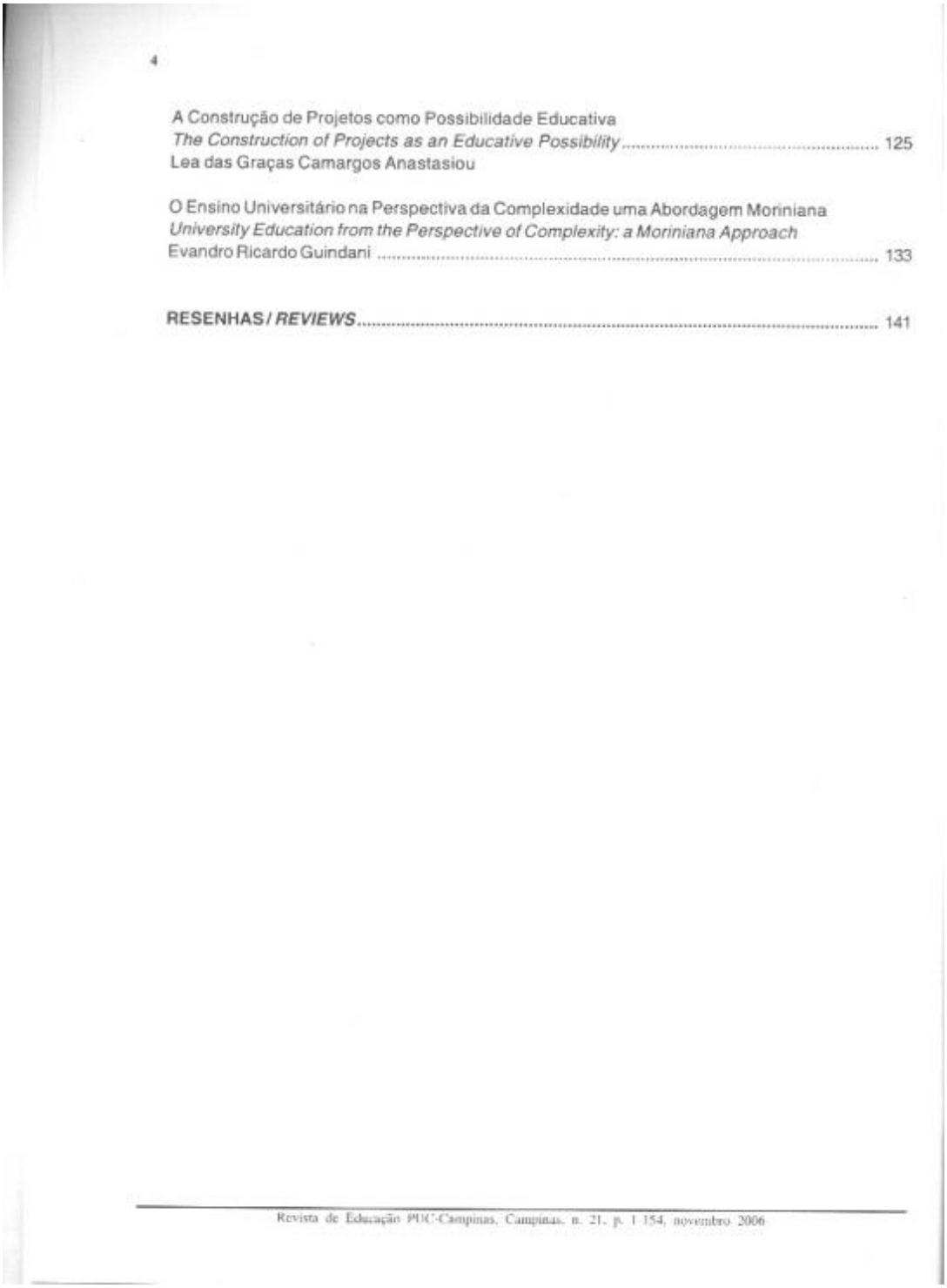
La Enseñanza en las Clínicas: una Mirada Hacia la Comprensión de los Estilos Docentes Universitarios
Teaching in Clinics: a Look at Understanding the Styles of the University Teacher
Elisa Lucarelli, Gladis Calvo, Patricia Del Regno, María Donato, Claudia Finkelstein, Mónica Gardey, Martha Nepomneschi, Viviana Solberg 93

Uma Concepção em Construção: o Ensino Religioso em uma Perspectiva Pedagógica a partir do Artigo 33 da LDB
A Concept Under Construction: Religious Education from a Pedagogical Perspective According to Article 33 of the LDB
Sérgio Rogério Azevedo Junqueira 107

Revista de Educação PUC-Campinas, Campinas, n. 21, p. 1-154, novembro 2006

Revista de Educaçao PUC-Campinas

n.21, 2006



4

A Construção de Projetos como Possibilidade Educativa
The Construction of Projects as an Educative Possibility 125
Lea das Graças Camargos Anastasiou

O Ensino Universitário na Perspectiva da Complexidade uma Abordagem Moriniana
University Education from the Perspective of Complexity: a Moriniana Approach
Evandro Ricardo Guindani 133

RESENHAS / *REVIEWS* 141

Revista de Educação PUC-Campinas, Campinas, n. 21, p. 1-154, novembro 2006

Revista Iberoamericana de Educación

n.40, 2006

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SISBI - BIBLIOTECA
SIGNATURA: R-46-1

SUMARIO / *SUMÁRIO*

Presentación 7
Apresentação 11

MONOGRÁFICO: Educación para el desarrollo sostenible I
MONOGRÁFICO: Educação para o desenvolvimento sustentável I

Introducción 17
Introdução 21

José Gutiérrez, Javier Benayas, Susana Calvo, «Educación para el desarrollo sostenible: evaluación de retos y oportunidades del decenio 2005-2014» 25

Edgar González-Gaudiano, «Imaginario colectivo e ideario de los educadores ambientales en América Latina y el Caribe: ¿hacia una nueva matriz disciplinaria constituyente?» 71

Michèle Sato, «Isto não é um texto» 91

María José Hernández Ramos, Daniella Tilbury, «Educación para el desarrollo sostenible, ¿nada nuevo bajo el sol?: consideraciones sobre cultura y sostenibilidad» 99

Alcira Rivarosa, F. Javier Perales, «La resolución de problemas ambientales en la escuela y en la formación inicial de maestros» 111

Revista Iberoamericana de Educación

n.40, 2006

Sumario / *Sumário*

Daniel Gil Pérez, Amparo Vilches, Juan Carlos Toscano Grimaldi, Óscar Macías Álvarez, «Década de la Educación para un Futuro Sostenible (2005-2014): un punto de inflexión necesario en la atención a la situación del planeta» 125

NOVEDADES EDITORIALES / *NOVIDADES EDITORIAIS*

Reseñas de libros y revistas 181

Publicaciones de la OEI 195

Transinformaçao

V.18, n.3, 2006

TransInformação

ISSN 0103-3786

SISBI - BIBLIOTECA
SIGNATURA: T-3

SUMÁRIO | *CONTENTS*

Artigos | *Articles*

169 A Ciência da Informação e a sociedade brasileira: algumas representações de pesquisadores da área
The Information Science and the Brazilian society: Some representations of the area researchers
• Carlos Cândido de Almeida

181 Abordagens epistemológicas à Ciência da Informação: Fenomenologia e Hermenêutica
Epistemological approaches to the Information Science: Phenomenology and Hermeneutics
• João Luiz Pereira Marciano

191 Informação, ciberespaço e consciência
Information, cyberspace and conscientiousness
• Rubens Ribeiro Gonçalves da Silva

203 O campo da Lingüística Documentária
The field of Documentarian Linguistics
• Maria de Fátima Gonçalves Moreira Tálamo; Marilda Lopes Ginez de Lara

213 Patente gera patente?
Does the patent develop patent?
• Joana Coeli Ribeiro Garcia

225 O papel das linguagens de marcação para a Ciência da Informação
The role of marking languages in Information Science
• Sérgio Furgeri

241 Programa de Pós-Graduação em Ciência da Informação da Pontifícia Universidade Católica de Campinas: dissertações defendidas em 2005
Post Graduate Program in Information Science at the Pontifícia Universidade Católica de Campinas: *dissertations defended in 2005*

245 Índice
Index

247 Instruções aos Autores
Instructions to Contributing Authors

TransInformação, Campinas, v.18, n. 3, p.165-250, set./dez., 2006

Universidades

n.32, 2006

SISBI - BIBLIOTECA
SIGNATURA: J-5

Contenido

2 Editorial

3 La pertinencia social de la Universidad Iberoamericana
Ana Lúcia Gazzola

11 Educación y globalización
Rafael Cordera Campos

17 Cómo salvar al país
Marcone Formiga

23 La educación superior ¿Un bien público?
Pedro Gerardo González

27 Indígenas y educación superior: Algunas reflexiones
María Antonieta Gallart Nocetti
Cristina Henríquez Bremer

39 Estudio general de necesidades de las instituciones educativas
Francisco Sacristán Romero

49 Aplicación de la modelización matemática en la realización de pruebas de carga en cimentaciones sobre pilotes.
Luis O. Ibañez Mora, Gilberto Quevedo Sotolongo y Miguel A. Maestre

La Maga - Semblanza del Instituto Politécnico Nacional en su 70 aniversario

Universitas 2000

V.29, n.3 / 4, 2005

SISBI - BIBLIOTECA
SIGNATURA: U-8

Universitas 2000 / Volumen 29 / No. 3 - 4 / 2005

SUMARIO

Editorial
Martha Patricia Aguilera 11

Evaluando la evaluación en la Educación a distancia
Magali Briceño 15

Aprendizaje de la Investigación y Gestión del conocimiento en entornos virtuales.
Pedro José Rangel 37

Elementos teóricos de los componentes intangibles del turismo y su relación con la cultura de la calidad
Ninoska E. Viloria C.
Magally Briceño 55

La Enseñanza de los conjuntos difusos, facetas: Epistemica, cognitiva e instrumental.
Belkis Lopez Lameda 73

La Ruta del Proyecto pedagogico creativo en Educación inicial desde la continuidad.
Lorena C. Linares B. 97

La Evolución Institucional desde la perspectiva sistémica
Lermit Rosell Puche 119

Universitas Documenta 151

Universitas Informa 161

Universitas 2000

V.29, n.3 / 4, 2005

Universitas 2000 / Volume 29 / No. 3 - 4 / 2005

SUMMARY

Editorial
Martha Patricia Aguilera 11

Evaluating the evaluation in distance Education
Magali Briceño 15

Learning to do research of the Investigation and knowledge Management in virtual surroundings
Pedro José Rangel 37

Theoretical elements of the intangible components of the tourism and their relation with the culture of the quality
Ninoska E. Viloria C.
Magally Briceño 55

Teaching of Fuzz and Sets. Facets: Epistemic, cognitive and instrictional.
Belkis Lopez Lameda 73

The Route of the creative Project pedagogic in Education initial from the continuity.
Lorena C. Linares B. 97

The Institutional evolution from the systemic Perspective
Lermit Rosell Puche 119

Universitas Documents 151

Universitas Reports 161