

Promoting the Value of Libraries: Nothing in Life is Free

Libraries often look as if they are swimming on serenely, looking as if nothing much is happening while in reality they're paddling madly to get everything done! But if you don't know how to show what you are doing and how it contributes to the organization ... you could end up as a dead duck.

Remember:

- Nobody **knows** what you do
- Nobody **cares** what you do, (unless they want something or they want to save money)

➤ ***It's up to you to ensure they KNOW and CARE!***

What is Value?

Value is in the eye of the beholder or is it?

- The value of the library will vary according to the organization it is a part of
- Is value just dollars and cents or other types of value?
 - Contribution to the mission of the organization
 - Appearances, publicity
 - Legislative, Standards or other requirements
 - Stakeholder pressure
- If used by researchers and research they produce
- What is the value of what they do?
- If used by students & teachers (e.g. Schools, universities etc.)?
- Could they manage without the library? What would they pay for a library card?
- Contingent Valuation: the idea is that by means of carefully designed surveys it is possible to elicit, in quantitative terms, how much people value a particular organisation or service. (British Library, 2003)
 - How much would you be willing to pay for the Library's continued existence?
 - How much would you be prepared to sell your reader pass for, assuming you could not then replace it?
 - How much do you invest, in terms of time and money, to make use of the Library?
- Contribution to patient care (Marshall et al, 2013)

➤ ***Consider: What is valuable in your organization? Have you been asked to demonstrate value? How?***

Selected articulations of value by perspective.	
<ul style="list-style-type: none"> Library science 	<ul style="list-style-type: none"> — Products are consumed by clients/customers — What libraries do — Benefits of use of library materials — Return on Investment (ROI)* — "Librarians' Axiom" **
<ul style="list-style-type: none"> Education 	<ul style="list-style-type: none"> — Focus on components and types of education — Teacher evaluations — Standardized tests
<ul style="list-style-type: none"> Economic 	<ul style="list-style-type: none"> — Monetary worth — Amount for exchange
<ul style="list-style-type: none"> Business 	<ul style="list-style-type: none"> — Value creation — Return on Investment (ROI) — Public goods
<p>Note: * ROI is listed both under Library science and Business, as a number of studies at the state level (<i>e.g.</i>, Wisconsin, Pennsylvania, Florida, South Carolina) have been conducted to demonstrate the economic impact of libraries. See http://dpi.wi.gov/pld/econimpact.html for a listing of several of these studies.</p> <p>** James (1986) defines the "Librarians' Axiom" as public library usage increases as economic times become constrained.</p>	

(Jaeger et al, 2011)

How Can Value be Evaluated? How Has It Been Evaluated?

State Library of Victoria

Purposes of the study:

1. To expand the understanding of the value of public libraries in Victoria.
2. To provide public library managers with the means to calculate their specific contribution to the communities they serve.
3. To give public library managers information and advocacy materials to build their case for library funding.

Results:

- As a conservative estimate, Victorian public libraries return benefits valued at \$3.56 for every \$1 spent. This level of return is the same as, or better than, the return from other government spending
- Public libraries made a significant contribution to state and local economies, supporting 4,430 jobs, contributing \$722 million to income, and adding \$120 million to the Victorian Gross State Product.
- Library customers said they were willing to spend an average of \$72 a year to continue public library services – double the spend per capita of \$36. Even people who didn't use their library were willing to pay \$55 – more than one and a half times the current expenditure. Library customers estimated they would have to pay more than 10 times as much (an average of \$419 per annum) if the same services were offered by a commercial provider. More than 80% of public library customers (and people who didn't use a public library) said they would be willing to pay more for public library services but did not have the capacity to do so.
- People talked about meaningful pastimes, lifelong learning, finding information and feeling part of the community through their local library

SGS Economics and Planning (2011)

State Library of NSW

Purpose of the study:

1. To provide clear evidence of the contribution and value of NSW public libraries in terms of the **triple bottom line, or economic, environmental and social impact**.

Results:

- NSW public libraries generate at least \$4.24 of economic value for each dollar expended, and \$2.82 of economic activity for each dollar expended.
- Library users visit for an average of 35 minutes, view the library more as a cost-saver than a time-saver and are attracted mainly by the fixed collections, the availability of professional support and the friendly atmosphere.
- The top five outcomes from public library use are enhanced quality of life; enhanced enjoyment from hobbies; ability to obtain information not available elsewhere; facilitation of lifelong learning; and support for children's education.

- The top five contributions to the community were seen as being a safe and pleasant place to visit; supporting educational facilities; facilitating lifelong learning; encouraging responsible social behaviour; and ensuring access to the Internet for all. The underlying themes are clearly those of safety, harmony, equity and education.
- Public libraries principal contribution to community culture is through their lending, reference and local history collections. There is also an appreciative audience for cultural activities such as local art displays and talks by visiting authors.
- Economic value as measured by library users' willingness to pay averaged \$58.20 per annum, which valued public libraries statewide at \$392 million. This is 36.2% higher than 2004-2005 expenditure levels.
- Economic benefit, that is the financial amount saved relative to the cost of purchasing materials, was found to average \$325 per annum among surveyed library users. This aligned closely with a more structured estimate of a statewide benefit of \$1.216 billion, which equates to a benefit-cost ratio of 4.24 against the 2004-2005 investment of \$287 million. Thus for each dollar expended on public libraries, \$4.24 of economic benefit is generated.
- Economic activity measures the contribution of public libraries to the economy in real terms and was estimated at \$810.2 million. Thus for each dollar expended on public libraries, \$2.82 of real economic activity is generated.

J L Management Services (2008)

State Library of Queensland (Library Dividend / Socioeconomic Value)

Purposes of the study:

1. To determine what is the net contribution that public libraries make to community welfare. This contribution was measured via a **Cost Benefit Assessment (CBA)** framework, which contrasts the economic and social costs and benefits associated with public library services over a long-term evaluation period. CBA is the preferred tool of Australian governments for assessing whether a proposed investment is worthwhile, or an earlier investment has been worthwhile, taking into account economic, social and environmental considerations.
2. To determine what economic activity is induced in the regional economy by public library operations. This activity is measured by an **Economic Impact Assessment (EIA)** framework, which identifies the stimuli that public libraries introduce into regional economies through their expenditure profiles, and traces how these stimuli culminate in economic activity in buyer and supplier industries through successive rounds of economic transactions. The EIA framework traces the economic activity (income, value added and employment) generated by investments made by public libraries, by way of operating costs, staff salaries and ongoing maintenance expenditures. Unlike CBA, an EIA does not assess the merit of investment.

Results:

- Queensland public libraries contribute significantly to community welfare. Indeed, the benefits contributed by public libraries **outweigh their provisioning costs by a factor of 2.3**.
- The economic activity induced by Queensland public libraries in Queensland is significant after accounting for all of the multiple rounds of transactions induced by library related expenditures. In short, **public libraries contribute approximately \$295 million to Queensland Gross State Product and support 3,135 full time equivalent jobs each year**.

SGS Economics and Planning Pty Ltd (2012)

Free Library of Philadelphia

Purposes of the Study:

1. What value does the Free Library of Philadelphia (“the Library”) create and add to the economic lives and futures of its users and the citizens?

Results:

- Literacy
 - The economic value of the Library services that help Philadelphians learn to read and acquire working skills totals \$21.8 million for FY10, comprised of:
 - \$18.4 million in literacy-related reading & lending
 - \$2.6 million in literacy related programming
 - \$818,000 in literacy-related online activities
 - 10% of survey respondents report “ I couldn’t have learned to read without the library,” meaning an estimated 10,788 people attribute their ability to read to the Free Library.
 - 13% of survey respondents report they taught someone else to read and could not have done it without the Free Library, meaning 14,024 people attribute their being able to teach someone to read to the Library.
- Workforce Development
 - The economic value of the Library services that help Philadelphians locate job opportunities and develop career skills totals \$6 million for FY10, comprised of:
 - \$2.2 million in career development book-reading & lending
 - \$2.1 million in job-finding online activities, including workforce database usage and online job searching/prep
 - \$1.7 million job-readiness and workforce-related programming
 - Fels estimates that 979 Philadelphians found jobs directly as a result of the resources provided by the Library in FY10. This translates into \$30.4 million in earned income in one year (at an average entry-level salary for Philadelphia), generating \$1.2 million annually in wage tax revenue for the city
- Business Development
 - The economic value of the Library services that help Philadelphians develop or enhance their own businesses totals \$3.8 million for FY10, comprised of:
 - \$2.9 million in business development online and database activities
 - \$819,285 in business development book-reading & lending
 - \$55,385 in business development programming
 - 8% of survey respondents report that they could not have started, grown or improved their business without the Free Library, resulting in an estimated 8,630 businesses that benefited from Free Library business development services.
 - Homes within ¼ mile of a Library are worth, on average, \$9,630 more than homes more than ¼ mile from a Library. For homes between ¼ and ½ mile of a Library, the additional value is \$650.
 - Libraries are responsible for \$698 million in home values in Philadelphia. That’s an increase in home values that homeowners can borrow against to finance education, home improvements and other types of spending. The additional home values generated by proximity to a Library produce an additional \$18.5 million in property taxes to the City and School District each year. Under a scenario of accurate and timely assessments, this is how much property tax revenue could be lost per year if all libraries were closed.

Fels Research & Consulting et al (2010)

Return on Investment (ROI): Let's talk in dollars...

Return on investment (ROI) can be an integral part of the process for evaluating a library’s services, collections, staffing levels, planning for new services and resources, or measuring how valuable your library is to your community and stakeholders. ROI is how much you get back for what you put into something. Strictly speaking, ROI is based on dollars and cents. So, you need to be able to quantify how much money was invested in something and then you need to compare how

much money is gained or lost as a result of how the investment was handled. There are two kinds of questions that ROI is good at answering. One is: how much money will be gained by investing in a particular financial asset? The other is: will putting resources into a project or service yield a measurable benefit? Using ROI, libraries can try to place a value on the services they provide and the collections that they make accessible (Lown & Davis, 2009; Luther, 2008).

Various calculators are available for libraries to use to evaluate their ROI e.g. <http://www.ilovelibraries.org/getinformed/getinvolved/calculator> But there other ways to calculate ROI:

Q. How much money did you save your patrons by loaning books, movies and other items?

A. Number of items circulated multiplied by the average cost of the items.

Example: If your library circulated 25,000 items (books, movies, audiobooks) and you multiplied that by \$20 you've theoretically saved the people of your community \$500,000! How much have they invested in you?*

Q. How many family entertainment dollars did you save the people of your community by offering programs?

A. Program attendance for the year multiplied by the cost of the average movie ticket in your area.

Example: If your program attendance for the year equals 500 and you multiply that by the cost of a \$6.00 movie ticket you've saved \$3,000 of entertainment costs for the people of your community.

Q. How much money does your library save the people of your community by providing computers with Internet access for the public?

A. Number of people who use your public access computers in a year multiplied by the cost of using the same equipment and connectivity through a local business.

Example: Kinko's Copy Center has begun offering access to computers with Internet connections and Microsoft Office Suite at \$12 an hour, use that figure and multiply it by the number of people who used your computers last year. A local cyber cafe charges 13 cents a minute for Internet access.

Summary of Recent Public Library Return on Investment Studies

Out of State ROI Findings Summary			
Obtained from "Worth Their Weight: An Assessment of the Evolving Field of Library Valuation"			
Study	Scope	State	ROI
Taxpayer Return on Investment in Florida Public Libraries	State	FL	\$6.54
Tax Payer Return on Investment in Pennsylvania Public Libraries	State	PA	\$5.50
Placing Economic Value on the Services of the Middle Country Public Library in Suffolk County, New York	Individual Library	NY	\$4.59
Economic Impact of Public Libraries in South Carolina	State	SC	\$4.48
The Economic Value of the Port Jefferson Free Library in Suffolk County, New York	Individual Library	NY	\$4.14
Placing an Economic Value on the Services of Public Libraries in Suffolk County	County	NY	\$3.93
Economic Benefits of Public Libraries: Value for Money	9 libraries	OH	\$3.81

Placing Economic Value on the Services of the Northport-East Northport Public Library in Suffolk County, New York	Individual Library	NY	\$3.30
Carnegie Library of Pittsburgh: Community Impact and Benefits	Individual Library	PA	\$3.00
Placing Economic Value on the Services of the Mastic-Moriches-Shirley Community Library in Suffolk County, New York	Individual Library	NY	\$2.97
		Mean	\$4.23
		Median	\$4.04

Colorado ROI Findings Summary	
Library	Return on Investment for Every \$1.00 Invested
Eagle Valley Library District	\$4.28
Mesa County Public Library District	\$4.57
Rangeview Library District (Adams County)	\$4.81
Denver Public Library	\$4.96
Douglas County Libraries (District)	\$5.02
Montrose Library District	\$5.33
Fort Morgan Public Library*	\$8.80
Cortez Public Library*	\$31.07

Source: Library Research Service (2014)

Opportunity Costs / Costs of Time

- If it wasn't there, then what would be the costs? These are more economic impact figures that can be used to describe the value of your library:
 - How many people do you employ in the community?
 - Do you offer free homework help? What would it cost someone to hire that type of help for their child?
 - Value of goods and services you purchase within the community or county? Number of local businesses that you deal with?
 - What is the value of the newspapers and magazines offered in your library?

- How many reference questions do you answer a year? What does a private researcher charge to answer questions? (University of Central Florida charges \$50 an hour for fee-based research services!)
- How much would it cost to supply journal articles & legal information using a private provider?
- How many people use the library for business purposes? Number of businesses that are library patrons? Total circulation of business periodicals? Number of programs devoted to small business topics? What is the satisfaction level of people using the library for business reasons? What is the perceived importance of the library to non-users in the business community?
- Do you offer programs on personal financial planning or starting your own business? What did participants report back?
- How many library patrons combine a stop at the library with a stop at local businesses?
- How many visitor information requests do you get?
- How many requests for information on local businesses and social services?

Storytelling & Personal Experiences

Proof of the value and impact of libraries is not enough: sad but true. You have to combine these proofs with the power of story telling. A story enables a leap in understanding by the audience so as to grasp the value of an organization or community or complex system. Value proofs are great but combine your influencing skills with great storytelling and libraries can win the day!

Examples:

- It was in the aftermath of Hurricane Katrina when filmmaking couple Dawn Logsdon and Lucie Faulknor really came to appreciate libraries. After their New Orleans home was flooded in the storm, they found themselves outside a library in Baton Rouge, where lines stretched around the block to submit disaster relief applications online. "It was the only place to go to fill out information," Logsdon said. "The city and state government all failed miserably where the library was able to help." (Riley, 2013)
- Eileen Asher of Petaluma said her library in Michigan helped her do life-changing research while she was growing up. After learning as a teenager that a family member was part of the Ku Klux Klan, she devoted her time to researching the group at the library and came to the conclusion that she would never go down that path. (Riley, 2013)
- For Albertina Zarazúa Padilla of San Leandro, the library was "a matter of survival" when growing up in Carmel Valley, where English was not her first language. "I had to learn quickly to survive in school," said Padilla, 57. "The library was the opportunity to be at the same level as everyone else; it was the great equalizer. (Riley, 2013)

Continuous Quality Improvement (CQI)

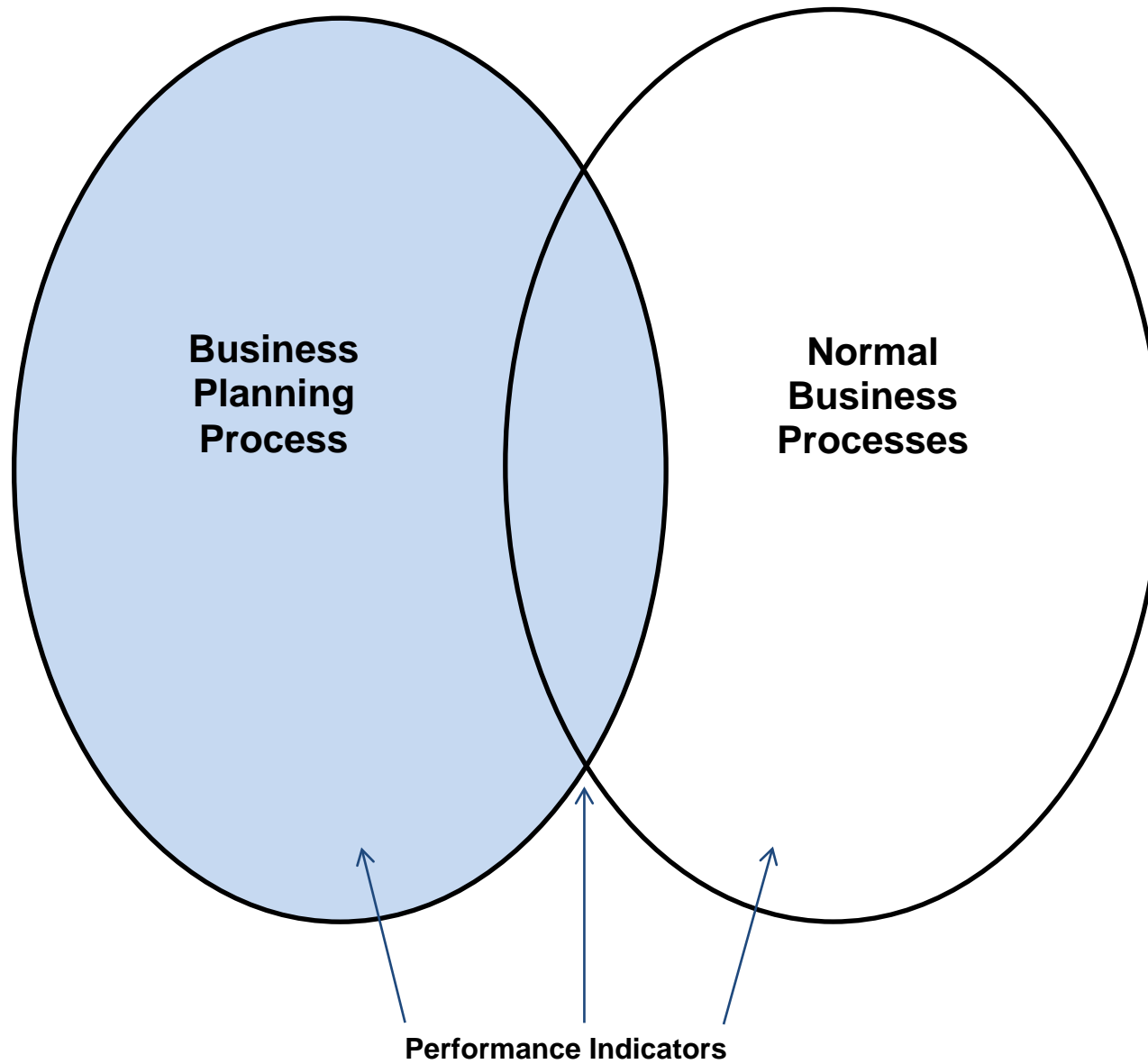
Assessing and demonstrating value should be done within a Continuous Quality Improvement framework. CQI is a culture of ***never-ending improvement*** of the whole system as part of ***normal daily activity***, continually striving to act according to the ***best available knowledge***. It's a way of doing business.

- CQI is the process of collecting data about a particular practice or service to benchmark performance, track and validate indicators that affect outcomes, and recognize problems in processes and management.
- The assumption behind quality measurement is that unless we learn something about what we are doing, we are unlikely to know that it needs improving or how to improve it.
- Measurement alone, however, is not useful – it must be associated with a CQI approach.

CQI is a process improvement approach for helping organizations identify and resolve inefficient and ineffective processes through problem solving and pilot-testing change strategies. There are several CQI processes for organizations that cover a wide range of activities. As organizations have unique structures, histories, and challenges that influence the change process, they need to consider these intra- and inter-organizational factors when making decisions regarding what kind of quality improvement process will work best

- Integrate CQI Planning into the Business Planning process
- Integrate CQI Planning into Normal Business processes
- Review results regularly
- Decide when changes will be made (it's not always possible to change immediately – it may require a planned change)

Continuous Quality Improvement Process

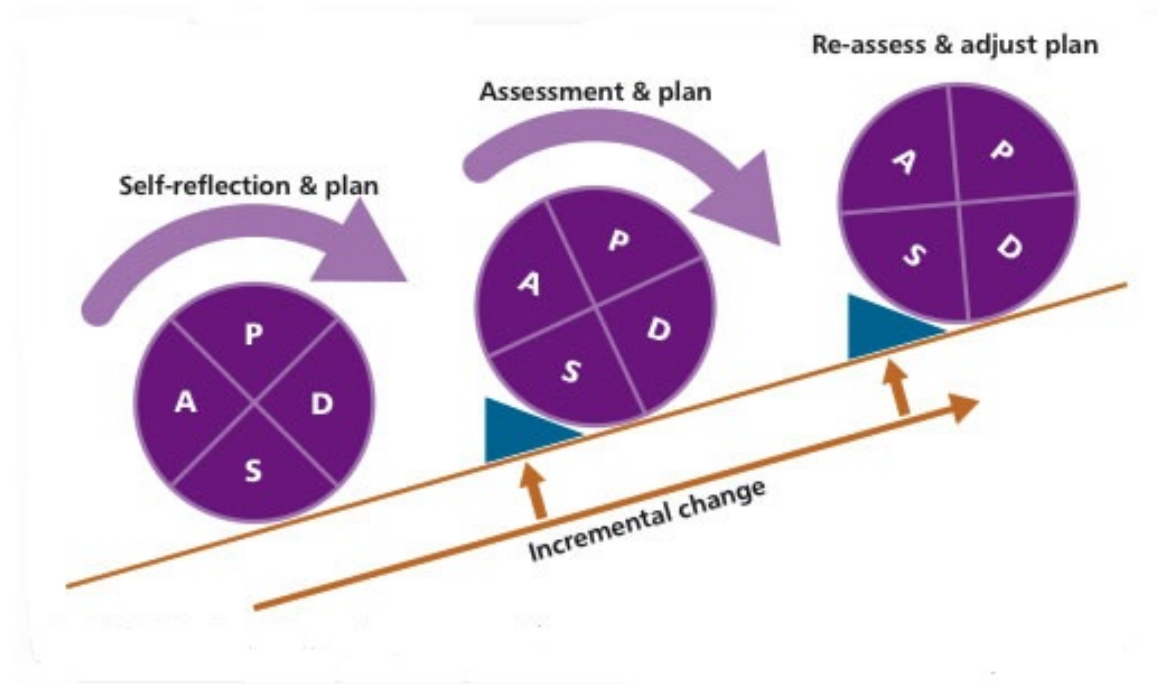


PDSA: Plan -> Do -> Study -> Act



A number of models and cycles can be used to apply CQI on an ongoing basis. One of the most commonly used approaches is the Plan-Do-Study-Act (PDSA) cycle. PDSA enables testing of changes on a small scale to determine if they are beneficial. Each small improvement builds knowledge and confidence and enables continued reflection on the quality of the practice.

1. *Plan*: identify what is not working well and identify a goal to work towards,
2. *Do*: implement specific steps to work towards the identified goal,
3. *Study*: reflect on the outcomes and results of the process, and
4. *Act*: adopt, abandon, or adapt new practices.



Definitions

- Continuous quality improvement or CQI is a process that, when effectively implemented, can better ensure that a set of desired practices are delivered in the manner they were intended, continuously and over time.
- Quality Assurance (QA) is an audit process that examines practices for the purposes of identifying and correcting divergence from policy or protocol
- Performance indicators are a tool that can be used in the CQI and QA process

Goals of the CQI Process

- Create and nurture a work environment that is characterized by an ongoing desire to learn and improve
- Identify those practices that are working well
- Identify those practices in need of attention and determine the specific enhancements that are needed to support improvements in the quality of service delivery (e.g., staff recruitment; training; coaching; technological advancements; the use of incentives; etc.)
- Improve outcomes

Underlying Principles

In order to be effective, CQI processes should be:

- Simple to administer
- Integrated into existing processes and technologies
- Focused on improvement
- A means to identify and measure success
- The responsibility of the entire organization

What's in it for you?

An effective CQI process can help your organization achieve important outcomes such as:

- Increased staff skills
- Increased staff satisfaction
- Improved confidence in the services delivered
- Enhanced fiscal responsibility
- Better, more evidence based, outcomes and outputs

Example of a process:

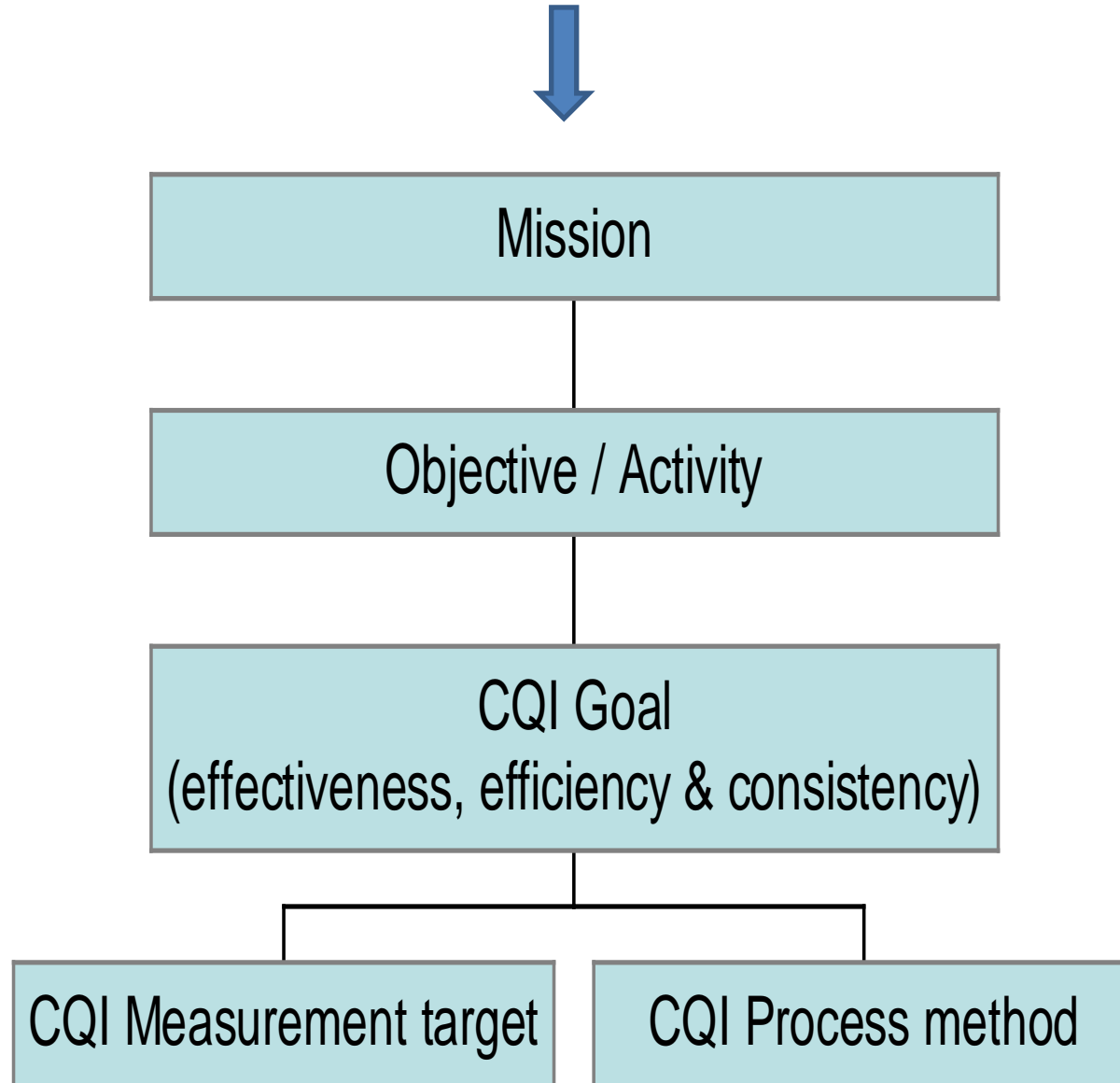
- **Plan:** The library staff learned about the features of their new system
- **Do:** They designed a method for collecting performance indicators using the system
- **Study:** The Performance indicators were assessed for usefulness after 12 months
- **Act:** Some performance indicators were discontinued

CQI Plan – The First Step

A CQI plan consolidates the objectives, activities, measures, structures, processes, and methods used to ensure that the resources and practices employed are achieving the desired outcome. It does not need to be complicated or long. In fact, shorter and simpler is usually better. The complexity is in determining what exactly the focus of the CQI process should be. To ensure that attention is paid to the most critical objectives and activities.

1. Identify the core mission or desired outcomes of the organization
2. Identify the objectives & activities that are fundamental to achieving the mission / outcomes
3. Define the CQI goal for each objective or activity - focus on effectiveness, efficiency & consistency
4. Determine the CQI measurement target. Each CQI goal and objective must have a clear target and statement that describes what the process is designed to measure
5. Determine the CQI process/method (see "Performance indicators" below)
6. Develop a structure to deliver the CQI processes (i.e. policies, procedures, forms, training, assignment of personnel to the CQI activities)

Structure to deliver the CQI processes (i.e. policies, procedures, forms etc.)



Processes

The processes that are used when implementing CQI plans should be appropriate for the area that is to be monitored. Some examples include:

- Case audits
- Direct observation
- Video taping
- Audio taping
- Checklists
- Surveys
- Focus groups
- Exit surveys
- Pre / post testing
- Statistics / performance indicators

PDSA: What Next?

- *Plan*: Identify what is not working well
- *Do*: implement specific steps to work towards the identified goal if you are not achieving it
- *Study*: reflect on the outcomes and results of the process
- *Act*: adopt, abandon, or adapt new practices & start all over again

Performance indicators

What?

It is important to remember that performance indicators are just that: "indicators". They are not proof. They are used to "indicate" that something is going on - it is up to us to interpret what that something is, and why it is happening.

The emphasis of performance indicators should be on performance as distinct from intention, and on indicators as signals or guides, rather than absolute measures. They are designed to monitor the performance of a facility on a continuous basis.

There is a distinction between performance measures and performance indicators. The indicator is more meaningful than the measure and is a better basis of comparison, either between locations, or from year to year.

- **Performance Measure:** a numerical result obtained by counting and can be a measure of input, output or outcome
- **Performance Indicator:** the relationship between two or more measures
 - the number of loans per annum is a measure
 - the number of loans per annum as a percentage of the size of the collection is an indicator
- **Performance Standard:** performance indicators should also be looked at in relation to a performance standard. This can be a maximum standard, a minimum standard or a target to be achieved.

Why?

Performance indicators can be used internally to provide a general overview of trends, to monitor the use of the service, to compare services within a network and to identify major differences from the norm or externally to demonstrate the value and scale of the activities at that location.

Indicators can also assist in budget preparation and justification and, if done properly, can help to motivate your staff. Also simply by focusing the staff's attention on service quality and organizational effectiveness, the results will be an increase in quality.

How?

Just as in the strategic planning process, performance indicators should arise out of an examination of what the organization's business is. Therefore, the goals will arise naturally out of the mission statement. The difference between the two is that strategic planning is designed more to deal with possible changes either in processes or the environment, or innovations that may be planned, whereas performance indicators look more at the day to day business of the organization and how it is performing. Strategic planning is looking at the future, performance indicators are looking at today.

The full process of devising performance indicators consists of:

1. Write down your organization's key goals. Base this on:
 - a. Information in your strategic plans, business plans, grant applications, and in marketing and other communications materials.
2. Describe the activities you're doing to achieve these goals and what your desired impact is.

3. Determine what information you should be collecting to show that you are successful. Start by brainstorming around the question: 'What do you want to know and show about this goal?' Then write down specific indicators you'd include in your snapshot that would address what you want to know and show. Don't limit yourself to data and other information that you can provide right now, but describe what you'd ideally like. Describe your vision, mission and business and how it relates to that of your organization
 - a. A vision statement is a vivid, idealized description of how you want the community and world to change for the better as a result of your organization's work.
 - b. Your mission statement describes the overall purpose of your organization including your social, environmental and/or cultural objectives and how you are working to achieve them.
 - c. Describe your business including what specifically you produce, sell or provide, and how your offering is unique.
4. Define the current goals of your organization in order to fulfil this vision & mission statement.
5. Decide on what strategies are required to fulfil these goals.
6. Describe what are the intended outputs or outcomes as a result of these strategies.
7. Devise performance indicators to measure how well these outputs/outcomes are being met. Clearly state how these indicators will be calculated
8. Decide on how and how often the indicators will be measured (e.g. statistics, survey, observation) and decide on targets to be reached. List these in a table
9. Report and revise indicators at least annually.

Alternatively, for those who want to short cut the process, the following can be done:

1. List the services/activities in your organization that:
 - a. you would like more information on;
 - b. you continually have problems with;
 - c. your management requires information on;
 - d. you think would best illustrate the advantages or deficiencies of the organization
2. List the tasks involved in these services/activities
3. Decide on how to measure effectiveness/efficiency of tasks and how often (what methods will be used, what calculations will be done etc.) and decide on targets to be reached.
4. Report and revise indicators.

When?

How and how often indicators are collected will depend on the type of information required, and the method in which the data can be compiled.

Indicators should be reviewed and reported on at least annually. This is essential as you do not want to collect meaningless data, and it may be that something you thought was important to know about once may no longer be necessary. Alternatively, the data may be too difficult to collect, and not worth the time and effort expended. Any reports you generate, as a result of this process, should be passed on to senior management.

- Keep it simple
- Keep it achievable
- Keep it meaningful

An indicator can be defined as something that helps you to understand **where you are, where you are going and how far you are from the goal**. It may be numerical data, but it can also be a graphic, a list, a narrative, and so on. It must be a clue, a symptom, a pointer to something that is changing. In other words, indicators are bits of information that highlight what is happening in a system, both within your organization and outside of it.

What Makes a Good Indicator?

Useful indicators are those that:

- Can be easily interpreted and communicated by others.
- Are reasonable to gather.
- Represent both qualities of the change (how well), in addition to the quantities (how much).
- Can give insights about where you want to go, not just current or past performance.
- Can be compared - such as a budget or last year's figures and/or an industry benchmark
- Are precise.

Monitoring Methods

The following list describes some common methods to collect information:

Activity Log

- Staff report of daily activities.

Anecdotal records

- Stories and narratives about an event, an experience, or an individual, described by staff or participants.

Documentation

- Administrative records of activities (e.g., inventory software, reports, minutes of meetings etc.).

Evaluation Form

- A set of questions that determine the participants' opinions, attitudes, and understanding once an activity is complete.

Focus Group

- Group discussions with a relatively small number of selected people about certain questions.

Interview

- A set of questions (could be predetermined or not) about certain topics that are posed to a target audience and followed by additional questions and conversations.

Journal Recording

- Self-report of daily activities by participants.

Knowledge/ Skill Tests

- After a training session

Survey

- A set of predetermined questions about certain topics that are answered by a target audience.
- A set of questions that determine the level of knowledge or skills in participants.

On-site visits

- A combination of observation and interviews that occur in the participant's environment.

Observation notes

- Notes taken through direct observation of verbal and nonverbal behaviours that occur in activities.

This list is based on definitions in: Zarinpoush, F. *Project Evaluation Guide for Nonprofit Organizations: Fundamental Methods and Steps for Conducting Project Evaluation*. Toronto, Ontario: Imagine Canada, 2006.

The following resources may be useful to look at to identify potential indicators.

Demonstrating Value Monitoring Ideas Library	www.demonstratingvalue.org/what-we-offer/our-solutions/tools-and-resources/monitoring-ideas-library
Mr. Dashboard	www.mrdashboard.com/Business_Metrics.htm
KPI Library	Kpilibrary.com
Global Reporting Initiative, Indicator search	www.globalreporting.org/ReportingFramework/G3Online/PerformanceIndicators/
Prove and Improve, Sample Indicators Bank	www.proveandimprove.org/new/meaim/samplendicators.php
Impact Reporting and Investment Standards (IRIS)	iris.thegiin.org/iris-standards

Communicating Your Library's Success

What do you want to know and show?



Communication: What?

- An **Organizational Sustainability Perspective** - What information can help you understand whether you are developing and maintaining resources to meet your purpose in the long run?
- A **Mission Perspective** - What information can tell you about the ability of the organization to successfully contribute towards the social, cultural and environmental objectives set out in its mission?
- A **Business Performance Perspective** - What information can tell you about the success of the organization from a financial or 'business' perspective?
- An **Operational Perspective** - What information do you need to support day-to-day decisions by management and staff? For instance, what can help you stay on top of costs, quality, and delivery of your mission?
- A **Strategic Perspective** - What information do you need to support strategic decisions that are often made by a governance body such as a board? This information needs to educate your audience about key trends and events that have occurred.
- An **Accountability Perspective** - What information do you need to foster and maintain support of the organization? This includes support by investors, community members, employees and beneficiaries of your mission. This audience may have very limited knowledge of who you are and what you are trying to accomplish so your "story" needs to be very crisp.

(Demonstrating Value Workbook, 2011. p.3)

Communication: How?

- Step 1: Define your Audiences and their needs
 - Define the people who care (or should care) about your library and what they would like / need to know
 - Assess how you can better engage your Stakeholders
- Step 2: Design a Communication Strategy & Performance Snapshot
 - What, Who, When, How?

(The following information is excerpted from the Demonstrating Value Workbook, 2012 p.4-7)

Step 1: Define your Audiences and their Needs

Your organization is important for many different groups of people, and in different ways. These are your stakeholders. Understanding who these people are and what they care about is critical for developing effective monitoring and reporting capabilities. Common stakeholders include:

- Employees
- Volunteers
- Management

- A governance body (e.g. Board of Directors)
- A parent organization (for example in the case of a social enterprise that is associated with a broader non-profit organization)
- Constituent group – those in whose name you are working
- Customers
- Investors, funders, donors
- Peers and partners
- The community at large

Who are the people who care about your organization and what they would like to know?

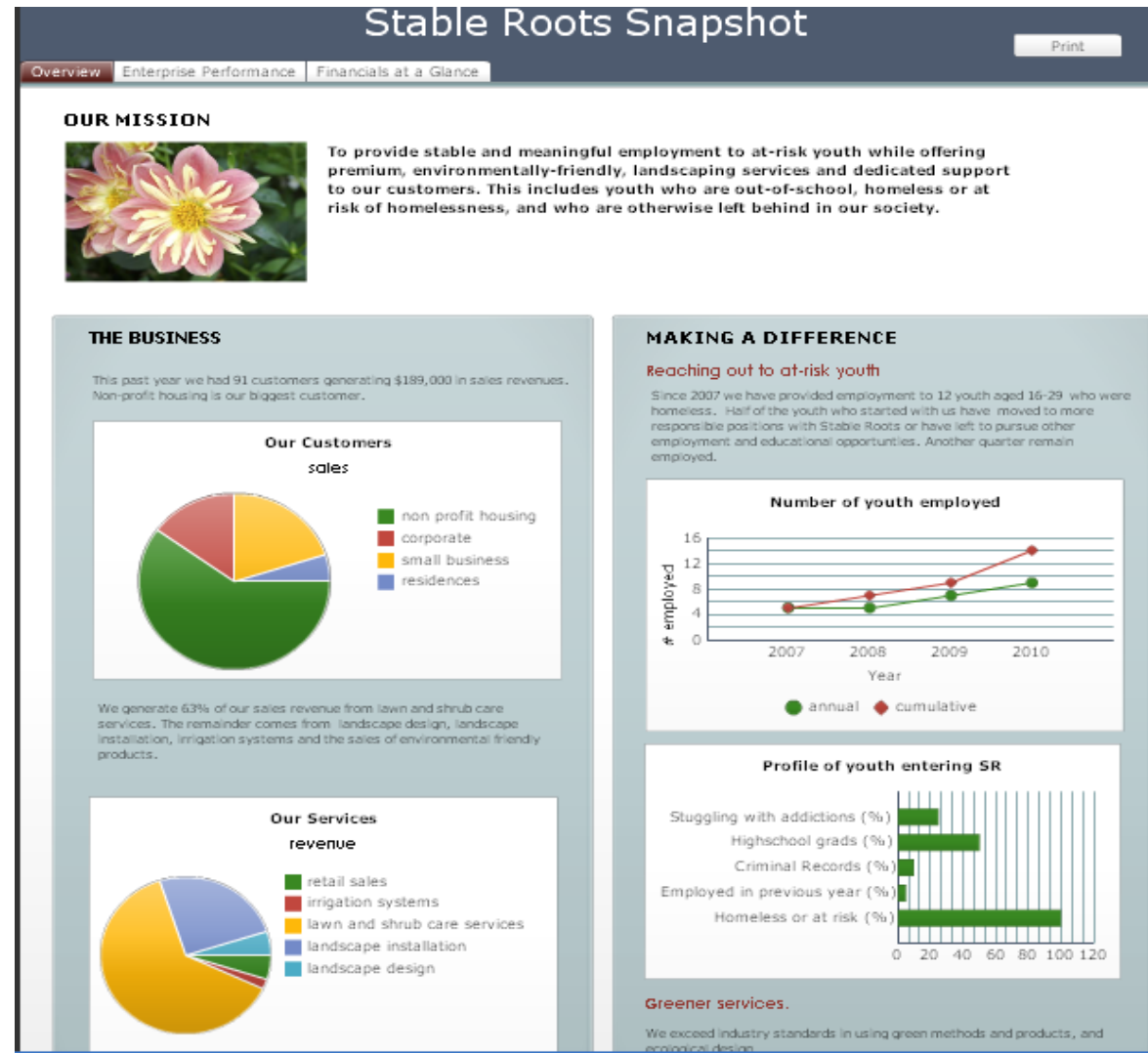
Identify your stakeholders and describe what information they need to have to do their job effectively. What does each stakeholder need to know about your library in order to manage, plan or to provide support? What are the key groups of people that matter in and around the organization?

Stakeholder	Information needs - what they need to know
e.g. Management	<ul style="list-style-type: none"> • Need to monitor operational issues and should be able to access additional information easily if needed to make decisions.
e.g. Advisory board	<ul style="list-style-type: none"> • Need to be clearly informed (in a succinct way) about what is happening with the enterprise so they can offer the best advice possible.

Step 2: Develop Your Performance Snapshot

A Performance Snapshot is a communication tool that you can develop to present the performance and value of your organization to boards, investors/funders and staff. It is tailored to your needs and the audiences you want to connect with.

Example:



Design your Snapshot

The snapshot can be a printed document or an electronic 'dashboard', which allows you to actively engage with the information. This tool will give you a clear picture of your organization to help you plan and manage your day-to-day activities, demonstrate your value to others, and ensure the long-term sustainability of your organization. Examples of performance snapshots can be found at:

www.demonstratingvalue.org/what-we-offer/our-solutions/performance-snapshot/examples

Advantages of developing a snapshot include:

- Saving valuable time finding and pulling together data and other information for reports.
- Seeing key trends and relationships in data, so you can get the most from the data you collect.
- Combining different types of information effectively to engage your audience.

The exact content and format of the Snapshot depends on the audience you want to reach and the issues that are important. The design process includes thinking about who the audience is, what decisions they are making and the messages you want to convey, and the information that can be presented (numeric, narrative, pictures, quotes, video) to tell your story. This depends on your needs and audience. For example, the layout and content for a bi-monthly board presentation might be very different from a Snapshot designed to be part of your public website to engage volunteers and donors.

At this stage you are ready to design your snapshot. You may want to do this directly in the program you are using (Word, Excel, or a reporting software like SAP's Crystal Dashboard Design), or sketch out content ideas first. Design it only with the indicators that are currently available or which you can develop easily. If you don't have the data right away, make up data and adjust it later.

For each section, think carefully about what you want to convey. Beware of presenting data for the sake of presenting data! Rather group and relate information to make it meaningful. This means thinking about:

- Decisions that the snapshot's audience will be making.
- Clear messages you want to convey about your value

It can be helpful to review your information maps to remind yourself of how the indicators relate to activities, objectives and impact.

You can use figures, numbers, text, stories, and even multimedia like videos and photo, to convey your message. Present it so that it can provide maximum insights to your audience. For instance, data and figures can be more powerful if you also provide some text to help your audience interpret them.

Snapshot Design Tips

1. Vary how you present information to keep it interesting.
2. Distinguish pages through changes in format and colour.
3. Use data, figures and graphics that:
 - Accurately shows the facts
 - Grabs the reader's attention
 - Complements or demonstrates arguments
 - Has a title , labels and units

- Is simple and uncluttered
 - Clearly shows any trends or differences in the data
4. Present information in an engaging and appropriate way. Different types of graphs show different things (a line graph shows trends, a bar chart highlights comparisons, a pie chart shows shares, etc.).

Appendix 1

CQI PLAN

Example:

Mission: To satisfy staff and inmates requirements for information, by providing access to appropriate information resources to support their workplace, educational, research and inmate recreational needs in the most efficient and effective way.				
Objective	What: Activity	How: Process	How often / Who	Target
1. Effective resource management	<ul style="list-style-type: none"> Monitor budget to ensure no overspending 	<ul style="list-style-type: none"> Audit monthly budget report 	<ul style="list-style-type: none"> Monthly / Manager 	<ul style="list-style-type: none"> Actual spending within budget
	<ul style="list-style-type: none"> Manage staff absences 	<ul style="list-style-type: none"> Audit staff absences 	<ul style="list-style-type: none"> Monthly / Manager 	<ul style="list-style-type: none"> Staff absence <5% per shift
2. Promote career planning & professional development	<ul style="list-style-type: none"> Monitor percentage of library staff with professional development plans 	<ul style="list-style-type: none"> Audit LMS professional development plans 	<ul style="list-style-type: none"> 6 monthly / Manager 	<ul style="list-style-type: none"> >90% PD plans on track
3. Identify cost savings initiatives	<ul style="list-style-type: none"> Monitor document delivery cost savings 	<ul style="list-style-type: none"> Statistics 	<ul style="list-style-type: none"> Monthly / Manager 	<ul style="list-style-type: none"> > \$50,000
4. Provide High quality client services	<ul style="list-style-type: none"> Maintain high library user satisfaction with staff & services 	<ul style="list-style-type: none"> Survey 	<ul style="list-style-type: none"> Annual / Manager 	<ul style="list-style-type: none"> Rate of library users satisfaction with library staff & services > 80%
5. Enhance access for people with disabilities and people from Culturally and Linguistically Diverse (CALD) communities.	<ul style="list-style-type: none"> Increase uses (hits) of the inmate legal portal 	<ul style="list-style-type: none"> Statistics 	<ul style="list-style-type: none"> Monthly / Manager 	<ul style="list-style-type: none"> > 5% increase in the uses of the inmate legal portal per month

Mission:				
Objective	What: Activity	How: Process	How often / Who	Target
	•	•	•	•
	•	•	•	•
	•	•	•	•
	•	•	•	•
	•	•	•	•
	•	•	•	•
	•	•	•	•

Appendix 2: Stakeholder Information Analysis

Stakeholder	Information needs - what they need to know
e.g. Management	<ul style="list-style-type: none"> Need to monitor operational issues and should be able to access additional information easily if needed to make decisions.
e.g. Advisory board	<ul style="list-style-type: none"> Need to be clearly informed (in a succinct way) about what is happening with the enterprise so they can offer the best advice possible.

Appendix 3: Tools to Help in Determining Indicators

Mission Perspective

What information can tell you about your success in contributing towards your social, cultural and environmental mission? List up to 3 goals you have relating to your **mission** (your social, environmental and/or cultural objectives)

Examples of goals in this area:

- *Improve awareness and engagement (around a specific issue)*
- *Shift people's behaviour and practices so they are more _____*
- *Build community capacity to _____*
- *Improve livelihoods and well-being*
- *More effectively engage different cultural groups, ages and genders*

Sample Activities:

Desired Impact:

What is useful to track and why? Think about what you want to 'to know and show' about the goals, activities and impacts you've described, and what you could then measure.

Business Performance Perspective

What information can tell you about the success of the organization from a 'business' perspective?

List up to 3 goals you have relating to your **market and customers**

Examples of customer-related goals:

- *Maintain existing customers - increase percentage of sales that comes from return customers*
- *Exceed customer expectations about products and/or service quality*
- *Diversify the customer base to be less reliant on a few key customers (or markets)*
- *Expand services into new geographic area.*
- *Develop more effective marketing promotions*
- *Renew your brand image; differentiate your image in the market*

Sample Activities:

Desired Impact:

What is useful to track and why? Think about what you want to 'to know and show' about the goals, activities and impacts you've described, and what you could then measure.

Operations Perspective

List up to 3 goals you have relating to your **operations**

Examples of operational goals:

- *Deliver products and services on time and on budget*
- *Improve information technology systems*
- *Improve internal and external communication*
- *Increase product/service quality*
- *Improve safety of operations*
- *Green operations; reduce waste*

Sample Activities:

Desired Impact:

What is useful to track and why? Think about what you want to 'to know and show' about the goals, activities and impacts you've described, and what you could then measure.

Financial Performance Perspective

List up to 3 goals you have relating to your **financial performance**

Examples of goals in this area:

- *Improve ability to pay expenses in a timely manner*
- *Increase the revenue obtained from each customer*
- *Obtain sufficient income*
- *Reduce dependence on short-term grants*
- *Reduce debt to a manageable level*
- *Control key costs that affect profitability*

Sample Activities:

Desired Impact:

What is useful to track and why? Think about what you want to 'to know and show' about the goals, activities and impacts you've described, and what you could then measure.

Organizational Sustainability Perspective

What information can help you understand how you are managing long-term risks to your organization?

List up to 3 goals you have relating to your **organizational sustainability** (e.g. building strong human resources, relationships, systems, financial capital, expertise and knowledge)

Examples of goals in this area:

- *Retain and support staff and/or volunteers*
- *Provide training, skill development and other learning opportunities for employees and/or volunteers*
- *Improve financial sustainability*
- *Reduce dependence on short-term grants*
- *Create an inclusive environment where learning is shared*
- *Enhance profile and leadership in the community*
- *Build the capacity of the board of director*

Sample Activities:

Desired Impact:

What is useful to track and why? Think about what you want to 'to know and show' about the goals, activities and impacts you've described, and what you could then measure.

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