Measuring what matters to stakeholders

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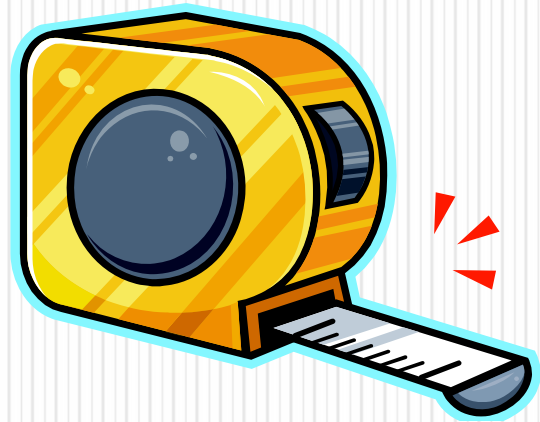
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Workshop objectives

Participants will be able to:

- Understand the library's value within the mission of the larger organization
- Identify key library stakeholders and what matters to them
- Build measurement into the strategic planning process
- Learn about tools that link activities to outcomes
- Communicate value through measurement results

Who are your Stakeholders?

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What matters to your stakeholders?

- Questions
  - What is the library doing?
  - How well is it doing it?
  - Who is it doing it for?
  - What impact does the library have on users?
  - What is the cost for having a library?
  - Does the benefit outweigh the cost?

Administrators

- How does it affect the bottom line?
- Do we really need libraries?
  - Everyone has a computer
  - Wireless access is everywhere
  - Lots of free information on the Internet
- How does it relate to the institutional mission
- How do library services help us achieve our strategic initiatives?

The bottom line

You are either generating revenue, or supporting those who do
> *OR …*

You are helping to control operating expenses or supporting those who do
> *OR …*

You are creating expenses that add recognized value
> *OR …*

You are creating expenses that must be controlled or eliminated to reduce overhead

Will Welton, PHD, Director, MHA Program,
University of Washington

Clinicians and practitioners

- How quickly can I get answers to my patient care questions?

- Can I send my patients to the library?

- How can the library help me solve problems?

- Can they help me meet government regulations?

Educators and Researchers

- How quickly can I get the access to key resources?

- Will the library have the depth of resources to support the curriculum for my discipline?

- Can the librarians help me with comprehensive literature searches for grant proposals?

- Can I get exclusive access to materials while I am working on an important project?

What is the library's value?

- Library services have a qualitative impact on the organization's mission and goals

- Library services contribute to the bottom line

- Library services add value to the work of other units

- Librarians save time for other employees and enhance employee and staff satisfaction

Measures

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What to measure?

- What do you need to know for planning new services?

- What do decision-makers want to know?

- How can you show increases in usage?

- How can you show what users find valuable?

- How can you show the library has value?

Value Measures of library services

- Three common types of value measures:

  - **Implicit value**: measuring usages (circulations, downloads)

  - **Explicit value**: interview techniques that ask users about value or outcomes or a specific critical incident of use

  - **Derived value**: measures, such as ROI, that use multiple types of data collected on returns (benefits) and costs (investments) to explain value in monetary terms

Tenopir C. Beyond usage: Measuring library outcomes and value. Libr Management 2012; 33(1/2):5-13.

ACRL Report: *Value of Academic Libraries*

- Current state of research on community college, college and university library value

- New emphasis on "measurement" in higher education

- Qualitative measures require nuance

- Value is defined within the context of the institution
  - Answers the question: How does the library advance the mission of the institution?

- Executive summary offers specific steps

Value of libraries in patient care

- Multisite study – data from 118 hospitals
- 16,122 responses from physicians, residents, and nurses to web-based survey in Spring 2011
- 75% handled patient care differently as result of information obtained
  - Choice of drugs or other treatments
  - Diagnosis
  - Choice of tests
  - Post-hospital care
  - Advice given to patient

Marshall, JG et al. The value of library and information services in patient Care: results of a multisite study. J Med Libr Assoc 2013 January; 101(1):38-46.

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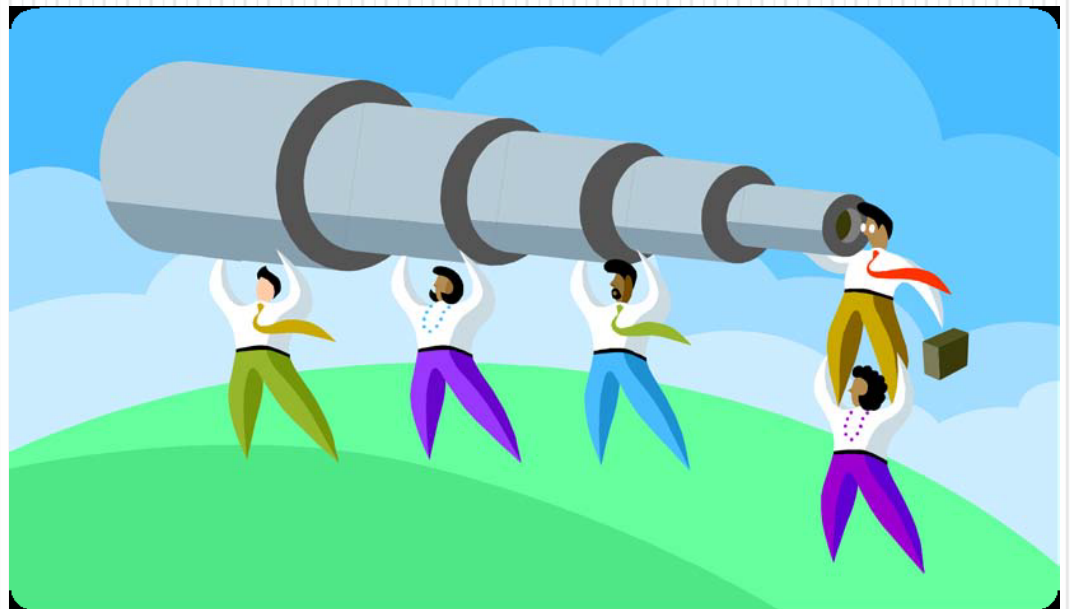
The Library Mission

Start with the organization's mission

- Align the library's mission & goals with the organization's mission & goals

- The library's value = library's contribution to achieving organization's mission & goals

Mission Concept

- Clinical Care $\longrightarrow$

- Education $\longrightarrow$

- Management of operations $\longrightarrow$

- Research & Innovation $\longrightarrow$

- Service $\longrightarrow$

Organizational Goal

- Provide excellent clinical care

- Provide services, resources needed for teaching and learning

- Reduce corporate risk
- Increase profitability
- Foster staff satisfaction

- Foster research
- Adopt innovative practices

- Improve the lives of patients and their families

Abels EG, Cogdill KW, Zach L. Identifying and communicating the contributions of library and information services in hospitals and academic health sciences centers J Med Libr Assoc. 2004 Jan;92(1):46-55.

Assess the Environment

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Why look at the environment?

- Identify outside trends that affect your institution

- Understand needs, desires and problems in context

- Validate assumptions about your contributions and services

Components of environment

- The organization

- Your library

- Clients/users

- Stakeholders

- The community

Assessing the environment

- Library statistics and records
  - Collection use – circulation and downloads
  - Service use – reference questions
  - Facility use -- computer use

- User/stakeholder input
  - Surveys, Focus groups, Interviews
  - Unsolicited Feedback

- Get out of the library: observe and talk to people
  - Understand the role of information in their work
  - Learn how information is acquired, applied
  - Discover information problems they are trying to solve

SWOT Analysis

Strengths
 	
 • Internal
 	
  • *Positive statements about your library*
	Weaknesses
	
	 • Internal
	
	  • *Statements about what is lacking in your library*

Opportunities
 	
 • External
 	
  • *Factors that can positively impact your library*
	Threats
	
	 • External
	
	  • *Factors that can adversely impact your library*

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Goals and Outcomes

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Goals are …

- Statements of purpose

- Aligned with the organizational mission

- Based on the results of the environmental assessment

Outcomes are...

- Changes that result from working toward goals

- Changes in attitude, behavior, skills, knowledge or situation

- Short, medium and/or long term

- Intended or unintended; Positive or negative

- **S.M.A.R.T.**

SMART Outcomes

- <u>S</u>pecific:

- <u>M</u>easurable:

- <u>A</u>ction-oriented:

- <u>R</u>ealistic:

- <u>T</u>imed:

Goals >>> Outcomes

- Logical process

- Action steps

- Resources to support the action steps

The Logic Model

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The logic model - a tool to...

- Show the "logical link" between activities and outcomes

- Provide a graphical image for program development

- Displays steps in the process

- Provides a group with a shared understanding

Good source for more information:

- W.K. Kellogg Foundation Logic Model Development Guide. 2004.
  http://www.wkkf.org/knowledge-center/resources/2006/02/WK-Kellogg-Foundation-Logic-Model-Development-Guide.aspx

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Logic Model components

Resources	Activities	Outputs	Outcomes
Resources to support what you do	What you do	What is produced by activities	What affect does does it have

Logic model worksheet

Goal:

Resources	Activity	Outputs	Outcomes

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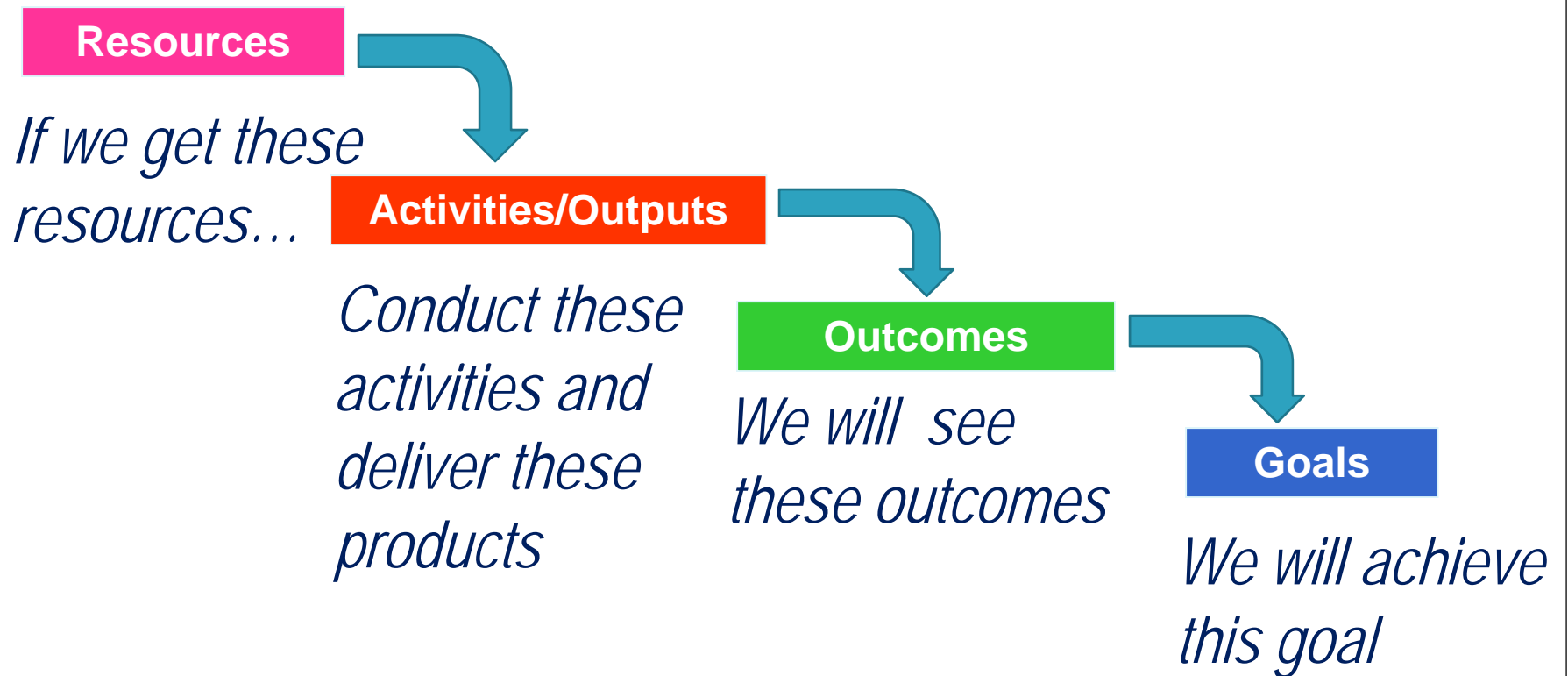Greater Midwest Region

Plan Backward, Implement Forward
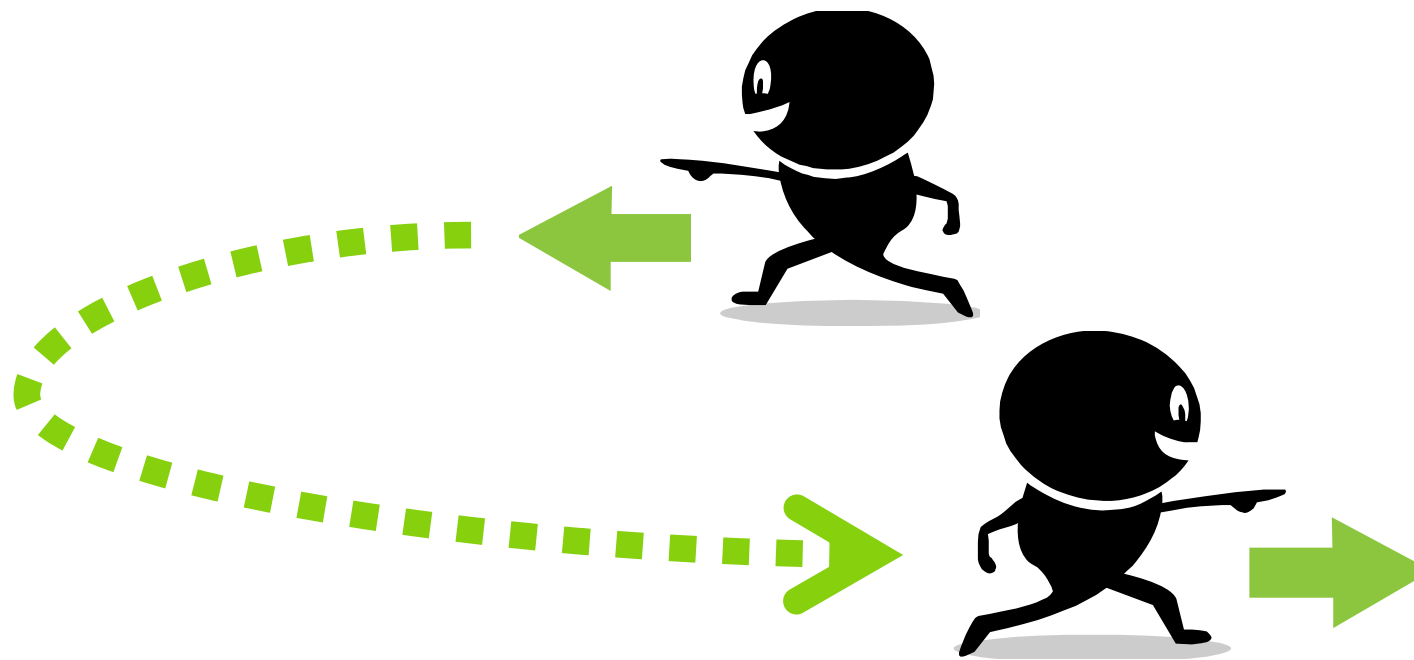
Activities and resources

- Activities - What you will do to achieve outcome
  - Assessments (survey, focus group)
  - Training (webinar, class)
  - Meetings
  - Webpage development
  - Promotional activities (press release, brochure, blog post)

- Resources – What you need to support the activities
  - Operating budget
  - Equipment
  - Collection
  - Personnel

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Outputs

- Outputs
  - *How many* did you do?
  - *How many* attended?
  - *How many* were distributed?
  - *How many* times was it used?
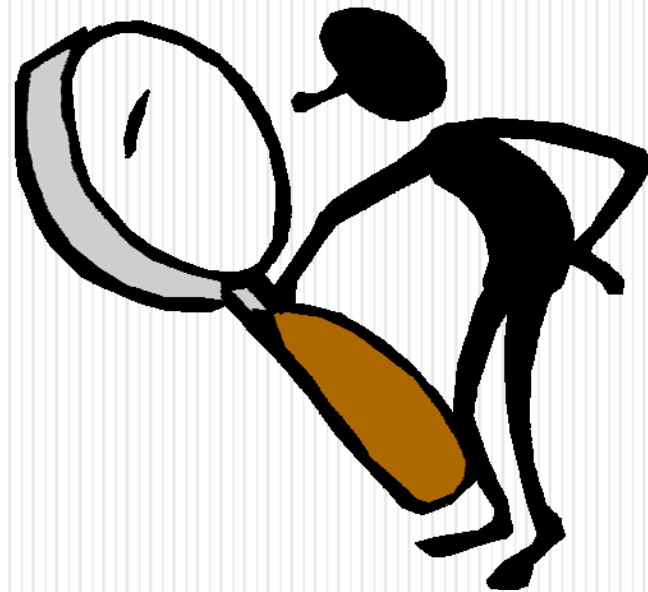
Putting it all together

Resources

If we get these resources…

Activities/Outputs

Conduct these activities and deliver these products

Outcomes

We will see these outcomes

Goals

We will achieve this goal

Logic model for goal:
Maximize use of e-book collections

Resources	Activity	Outputs	Outcomes
Personnel, money, expertise needed	*What you will do*	*What your activity will produce – data, classes, brochures,*	The benefits that accrue as a result of your program
• Collections • Staff time • Writing & training expertise	Targeted newsletter & blog articles	6 media outlets ran an article over 1 year	FY15 usage by students is 20% higher than FY14
	E-book webinars offered to students	10 webinars over 1 year with total attendance of 120	

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The evaluation plan

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The evaluation plan

- Builds on the logic model

- Provides a framework for what and how to measure activities

- Ultimately helps to assess value

As you select your measures

- Think about the audience

- Decide to use existing data or collect new data

- Determine if you need quantitative or qualitative measures

- Select a timeframe for measurement

Match Methods to Outcomes

- Savings: statistics (output, use, financial)

- Attitudes and beliefs: surveys, interviews, focus groups

- Awareness: proxy measures, surveys, interviews, focus groups

- Behavior: proxy measures, interviews, focus groups, observation

- Knowledge: written or oral tests

- Skills: observations, hands-on tests

Pieces of the evaluation plan

- Indicators

- Target

- Data Source

- Data Analysis Methods

- Data Collection Frequency

Sources of evaluation data

- Existing records and statistics

- Observation

- User and stakeholder input

- Survey results
  - Formal
  - Informal

- The literature

- Specialist or expert input

Evaluation plan

Outcome

Activity	Indicator	Target	Data Source	Data Analysis Methods	Data Collection Frequency
What is done to achieve outcome – from Logic Model	Measurable result of activity	Specific indicator measurement desired	Origin of indicator measurements	Organize, examine, learn from the data	Date, time and intervals

Example part 1

Activity	Indicator	Target
What is done to achieve the outcome	Measurable result of activity	Specific desired result
E-book webinars for students	Number of webinars	10 in one year
	Size of attendance	120 students attend in one year

Example part 2

Data Source	Data Analysis Methods	Data Collection Frequency
Origin of indicator measurements	Organize, examine, learn from the data	Date, time and intervals
Library calendar	Count	Each event and cumulate throughout the year
Registration database	Count	Each event and cumulate throughout the year

Making sense of the data

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Data Analysis

- Think about data analysis *before* collecting the data

- Identify experts that can help with data analysis

- Test your collection and analysis tools

- Leave enough time

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Your data

- Quantitative
  - Statistics
  - Evidence of change
  - Measurable impact of services provided

- Qualitative
  - Stories, opinions
  - Evidence of change
  - Perceived impact of services provided

Here are three ways to talk about the *monetary* value of your services

Savings

$400 in the stores NOW! $39.99

What would your services cost elsewhere?

Cost-benefit Analysis

What value is received for each dollar spent on this service?

Return on investment

%

What is the percent gain for money invested

Savings With Onsite Library

- What is the retail value of the resources and services your library provides?

- What would your users pay on the open market?

- Would your institution pay the retail costs?

Retail Value Calculator

Your institution realizes a benefit of $ for every one dollar budgeted.

Where is your library? [▼]
What type of library is it? [▼]

Library Annual Budget - you *must* enter your library's annual budget without commas [   ]
Number of months of stats you are using: [   ]

Number of Uses	Library Resources or Services	Cost of Resource or Service	Value of Resources or Services
[ ]	Print and e-Books used (in house, checked out or online)	125	$ 0.00
[ ]	Print journals used (in house or checked out)	35	$ 0.00
[ ]	E-Journal articles accessed	35	$ 0.00
[ ]	Document Delivery (Items borrowed for/delivered to users)	18	$ 0.00
[ ]	Reference questions Answered	45	$ 0.00
[ ]	Mediated searches	75	$ 0.00
[ ]	Class hours taught (Sum of students/class x hours/class)	30	$ 0.00
[ ]	AVs used or borrowed	150	$ 0.00
[ ]	Self service photocopies	.10	$ 0.00
[ ]	Meeting room use	50	$ 0.00
[ ]	Hours of computer use (i.e. Internet, MS Word, etc.)	12	$ 0.00
[ ]	Add another service or resource	[ ]	$ 0.00
[ ]	Add another service or resource	[ ]	$ 0.00
[ ]	Add another service or resource	[ ]	$ 0.00

[Clear Form] $ 0.00

CBA: cost/benefit analysis

- Ratio showing dollar value received for each dollar spent

$$\frac{\text{Benefits}}{\text{Costs}} = \text{Value}$$

ROI: return on investment

- Percentage showing the return (increase in value) on dollars spent to achieve a benefit
- ROI reflects the money realized by making an investment

$$\frac{\text{BENEFITS} - \text{COSTS}}{\text{COSTS}} \times 100$$

Calculators do the math for you

- ## Retail value calculator

  - http://nnlm.gov/mcr/evaluation/calculator.html

- ## CBA/ROI calculator

  - CBA: Benefits/Costs

  - ROI: ((Benefits-Costs)/Costs) x 100

  - http://nnlm.gov/mcr/evaluation/roi.html

Communicating Results

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Use the results…

- To communicate your value

- To promote and advocate for the library

- To maintain or get additional funding

- To improve library services and programs

Communication methods

- Reports: formal/informal, written/oral

- Internal publications

- Web sites

- Promotional materials

- Elevator talk

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Communication tips

- Link value to the organization's mission
- Support quantitative data with tables and graphics
- Use qualitative data (stories) to support quantitative data
- Focus on benefits to organization
- Avoid library jargon

"Elevator talk"

- Brief encounter – 30-45 seconds

- Highlight a specific accomplishment

- What your library contributes and why that matters
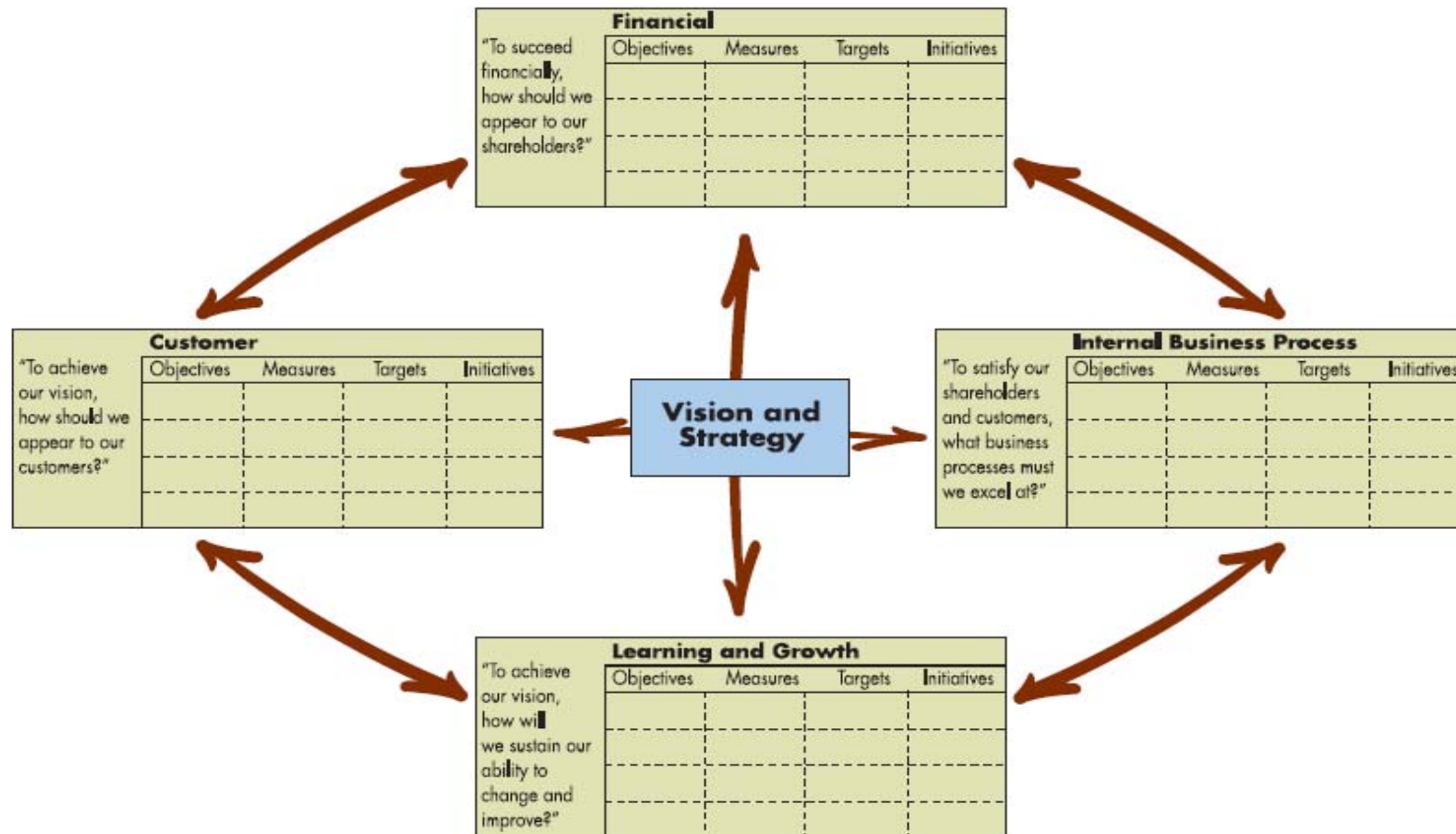
- Convey a benefit to the listener

Balanced Scorecard

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Balanced Scorecard

Translating Vision and Strategy: Four Perspectives

Financial

"To succeed financially, how should we appear to our shareholders?"

Objectives	Measures	Targets	Initiatives

Customer

"To achieve our vision, how should we appear to our customers?"

Objectives	Measures	Targets	Initiatives

Vision and Strategy

Internal Business Process

"To satisfy our shareholders and customers, what business processes must we excel at?"

Objectives	Measures	Targets	Initiatives

Learning and Growth

"To achieve our vision, how will we sustain our ability to change and improve?"

Objectives	Measures	Targets	Initiatives

Kaplan RS, Norton DP. Using the balanced scorecard as a strategic management system. Harvard Bus Rev 1996 Jan-Feb; 74: 150-161.

Balanced Scorecard – Strategy Map
Portland State University

User Perspective

Improve Information Literacy skills of undergraduates

Internal Processes Perspective

Raise awareness of information literacy program and objectives

Provide online information literacy tutorials

Librarians to develop services to integrate Info Lit into curriculum

Learning & Growth Perspective

Create a standardized information literacy departmental outreach program

Finance Perspective

Allocate resources to support Information Literacy program Initiatives

Bielavitz Tom. The Balanced Scorecard: A Systemic Model for Evaluation and Assessment of Learning Outcomes?. **Evidence Based Libr Inform Practice**, 2010 Jun; 5(2): 35-46.

University of Virginia Strategy Map

Enabling research, teaching, and learning through services, collections, tools, and spaces for the faculty and students of today and tomorrow.

Customers

C1. Improve the student experience

C2. Facilitate scholarship

C3. Enhance the reputation of the University

Finance

F1. Increase the financial base

F2. Provide resources and services with a high ratio of value to cost

F3. Raise funds for high priority initiatives

Internal Operations

I1. Ensure preservation of the scholarly record (C2/C3)

I3. Maximize spaces for research and scholarship (C1/C2)

I2. Improve ease of access to resources (C1/C2)

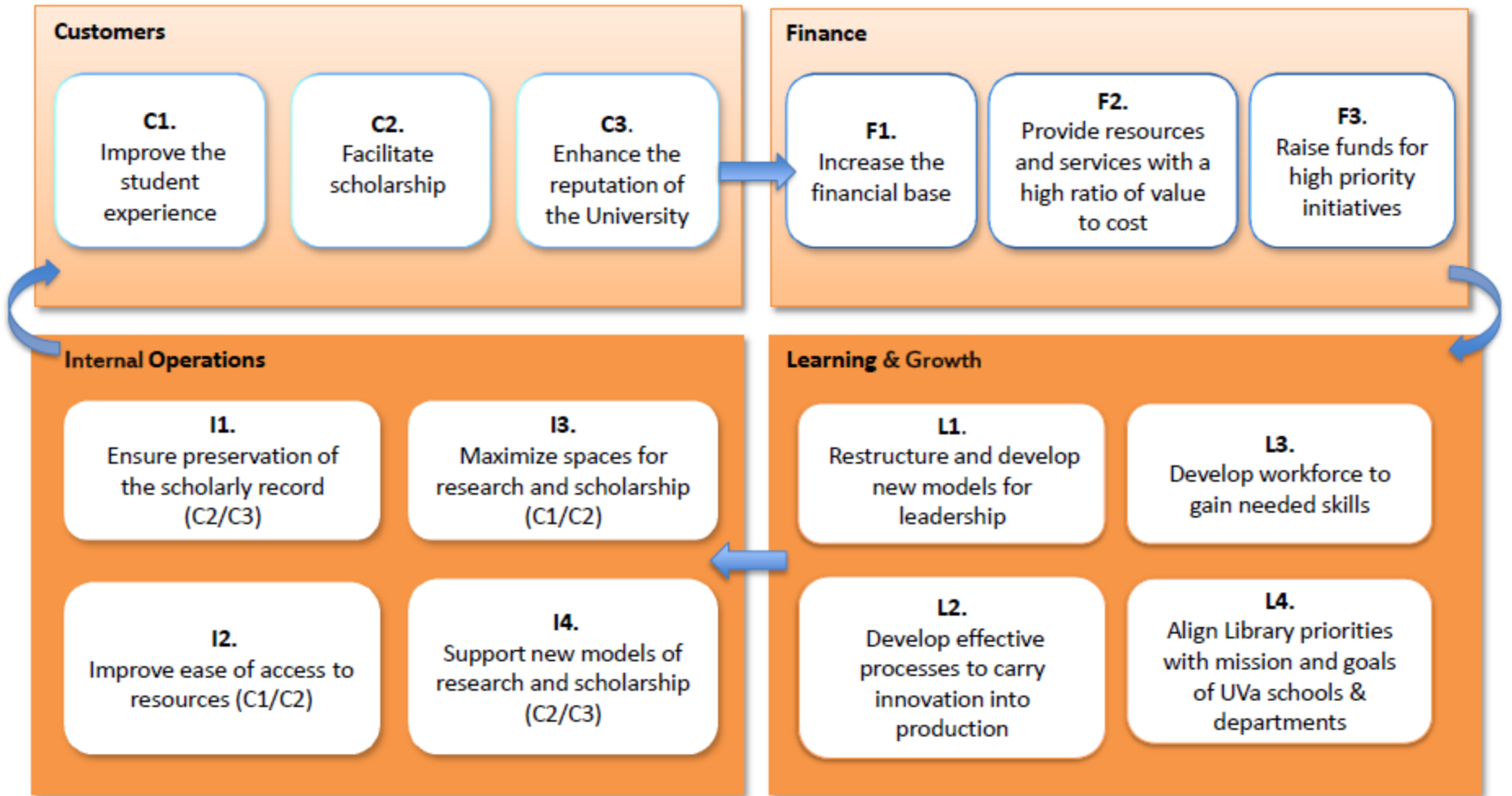**I4.** Support new models of research and scholarship (C2/C3)

Learning & Growth

L1. Restructure and develop new models for leadership

L3. Develop workforce to gain needed skills

L2. Develop effective processes to carry innovation into production

L4. Align Library priorities with mission and goals of UVa schools & departments

In Summary….

- Measure something about your library that has meaning to your stakeholders
- Relate the value of your library to the mission and goals of your organization
- Plan your evaluation before you begin
- Share your value with many audiences
- Don't wait for a crisis – *start now!*

Want more information?

- Resources list for this class
- NN/LM web resources
  - http://nnlm.gov/evaluation/
- Library value calculators & supporting data
  - http://nnlm.gov/mcr/evaluation/calculator.html
  - http://nnlm.gov/mcr/evaluation/roi.html
  - http://nnlm.gov/mcr/advocacy/statistics.html

Thank you

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