Best practices for demonstrating the value of your library services April 2010

Several months ago, we invited CALL members to share their best practices for demonstrating the value of their library collection and services to their stakeholders for compilation into a report to share with the membership.

Due to the current financial and fiscal climate, it is more important than ever before for law libraries of all types to be able to demonstrate how truly valuable they are to users, stakeholders and parent organizations.

Historically, there have been many quantitative and qualitative methods by which our community has tried to measure the volume and impact of the services we provide:

- cost per use and ROI through Electronic Resource Management Systems , etc.
- usage stats for print, electronic materials, ILL
- reference transactions
- cataloguing records added
- bibliometrics such as citation analysis
- the list is practically endless

Yet despite the best efforts of librarians, there continue to be stories about cutbacks and questions about the contributions of law libraries.

Which begs the question: are we measuring the right things, in the right way, according to the right definition of "value"?

How many of our traditional performance indicators measure service quality from the client's point of view? To be blunt, in today's context, management may not really care about our content resources, or our usage stats - but it cares about our contribution to the organization's goals.

From our analysis of the literature, it appears that the first, indispensable, step in any attempt to demonstrate one's value is to collect data that reflect meeting customer needs.

All of the examples, all of the professional literature, therefore emphasize the need to think strategically about the library's positioning within its overall organization. This means:

- mapping activities to the organization's objectives, identifying which activities help the organization better achieve its goals, whether this means time saved, reduced research costs, fewer billable hours spent by lawyers on research as opposed to other activities, quicker response times, better trained staff, etc.
- perhaps classifying products and services around each of the strategic objectives of the parent organization - this can help identify gaps in library activities and opportunities to develop new solutions and/or services

This strategic alignment is the most essential tool to help define the key performance indicators your library will need to measure and report on. It all depends on your context, your organization.

There are, in other words, no "best" best practices, only best practices that make sense to your library in the context of your organizational structure. In other words, value measurement puts stakeholders in the centre of the picture.

So, the key thing is to define what is valuable to customers / funders and from that, to define what the literature calls your value proposition: a credible and compelling promise the library makes to its customers about what they can expect and about what real positive impact the library can have on their work.

Recently, the SLA (Special Libraries Association) completed an Alignment Project that was designed to examine how the role of information professionals and librarians must evolve to meet the needs of a changing world and how those professionals can demonstrate the value of their services. While the SLA represents a wide range of sectors of activity, it has a strong and active Legal Division so many of the project findings can apply to law libraries. The Alignment Project involved 18 months of in-depth research, including an international online survey of executive-level professionals to find out what they expected from librarians and information specialists:

- The most highly-rated attributes of the information professional highlighted the need to focus on the benefits they provide such as saving time and money and facilitating good decision making

- Specific areas of emphasis included: providing expert analysis, maintaining a culture of continuous learning, providing contextualized information for users
- Information users valued relevancy, access, and timeliness

A language exercise tested six statements derived from the themes that arose in the SLA Alignment Project survey. Respondents were asked to rate specific words and phrases. Phrases that tested well included:

- Culture of continuous learning
- Innovative learning
- Knowledge sharing
- Accessible in a timely, secure and convenient manner
- Save time and money
- Value-added intelligence
- Identify trends
- Facilitate good decision making
- Expert analysis
- Create competitive advantage

Those are the angles from which users, clients, stakeholders and funders view value in general. *Those* are the impact stories or value propositions we have to make. *Those* are the kinds of outcome we must try to measure.

That "impact story" can only come from active engagement with the library's users and with management, from getting to know them, through such things as:

- comments and suggestions
- anecdotal evidence in the form of "real" stories about how colleagues applied a resource or service, for example to win a case
- surveys periodic focus groups
- website usability studies with small groups
- partnering with HR in the orientation process for new hires
- communications with senior management
- or whatever is appropriate in your context

This engagement and analysis will help you define performance indicators that are:

- aligned with the organization's mission

- important to customers
- valid, accurate, and meaningful

Remember: the situation for every library will be different. One library's "best practices" will not necessarily be your best practices. There is no one size fits all solution.

We hope that the examples provided by CALL members and the accompanying bibliography help you develop your own methods for proving your value to your users, funders, partners and stakeholders.

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Overview of results

Over the last few months, we received 7 submissions. (We suspect CALL members are overly modest, hesitating to put forward what they do as "best practices"…) While few in number, the submissions were rich in detail. Common practices among the submissions include:

- Surveys
- Evaluations
- Outreach/marketing
- User testimonials
- Statistics

Practices described by only one library include

- Focus groups
- Policy review
- Library committees

Surveys

Several contributions described carrying out surveys to gather information on the effectiveness of research services provided, the usefulness and relevance of maintaining serial print monograph collections, and user satisfaction.

> Every year, the Library conducts two month long samples of user satisfaction. An email survey is administered to all internal users who had submitted requests for complex/substantive research to the Library during those two periods. Specifically users are asked 5 questions: Did you receive the required information? Was it useful to your work? Was it received on time? Did library staff save you time? Would you have any additional comments to add?
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> The Library also regularly conducts surveys about our weekly training sessions and our journal electronic table of contents service, as well as a law clerk survey after they have been here almost a year (near to their exit time) about training and orientation, reference and research services, electronic resources, the quality and scope of the print and electronic collections, and our case commentaries database. The Library tries to respond to the many suggestions contained in the surveys.
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> We have started to do online surveys after training sessions. We recently completed a survey online to gauge the use and support of continuing print titles (relying on their memory of the use). Every title was listed and users were asked to think about their use (did they use 1-2 times a year, more than 2 times a year, never use, or will use in future). They were told in an earlier session that titles that were not used were to be cancelled; funds freed up could be used for titles they wished to add to the collection. This data feeds into our collection development activities and allows us to shift our budget to support titles that are perceived as essential.

One library reported that surveys have not provided the data they were seeking.

> Surveys are a tool we have considered but had mixed results so far. E-mail follow up surveys have yielded entirely positive results, and we have used paper surveys in the library. Surveys tend not to reach the people who are not

> using your services, though, and so far, empirical data has provided a clearer understanding of many of the operational elements we want to measure.

Evaluations

Several libraries invite comment on training sessions or research services through an evaluation form given out following the session or after research results are received.

> Nous acheminons à tous les clients du service de recherche un formulaire d'évaluation du service qu'ils viennent de recevoir en recherche. Il en est de même pour la formation. Tous les participants sont invités à compléter un formulaire d'évaluation. Les commentaires ainsi recueillis sont compilés et analysés au besoin.

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> We have started to do online surveys following training sessions to gather feedback on learning outcomes achieved (we ask them specifically "can you comfortably sort search results, note up, etc."), satisfaction with the session, suggestions for future or follow-up sessions.

Outreach/marketing

Several submissions described various outreach, marketing, and branding efforts that the library makes to reach and communicate its value to both its core and non-core users.

> We are fortunate to meet the new users of our libraries. That speaks to the priority that is given to learning and accessing information to effectively perform judicial work and how our services are regarded. I actively encourage training on the electronic tools but also indicate that they should borrow the books in their local library. I have been surprised that saying "borrow", "take it" out has been "freeing". Our collection circulates, but it appears our members do not want to borrow because someone else might need it. With new members I have been encouraging borrowing and seriously it has been freeing. I won't say books are flying off the shelf but we have noticed more members in the library using and borrowing resources. For the members that have indicated a book was not on the shelf, we have always managed to track down a book that might be needed urgently (usually 2-3 requests). Now there

may be some that don't ask and borrow elsewhere (we have two partner libraries right outside our door).

We have a fund raising book sale that runs all year round in our library. Members provide us with gently used books, primarily fiction that we resell inexpensively. We also found that increased traffic to our library, originally the judge but now primarily court staff. The member's secretaries now know us and that I feel has been positive as well.

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Our library website remains the main tool regarding access to our library collection for students and professors. The website remains the key tool to advertise our services, and workshops at large. A giant LCD screen is installed in our lobby, to remind clients of upcoming library presentations, library news and service hours. Personalized tours of the law library are organized for visiting professors and scholars.

The librarians dedicate time and resource to using social networking software used by all branch libraries to be in touch with our users. These tools include chat services on QuestionPoint, and instant messaging via Meebo. The Library also communicates activities of all its branch libraries via Twitter and Facebook.

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An Open House was held in the Library ... for members of private law firms from the National Capital Region and an historical exhibit on the evolution of the Court was hosted in cooperation with Library and Archives Canada. Another Open House was held in the fall of 2009 for government lawyers.

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Every piece of routed mail, every book delivered to a lawyer's desk, every document received on interlibrary loan or every written answer to a question is accompanied by a slip of paper indentifying it as coming from the library or a library staff member. Many years ago, I conducted a user survey and discovered that the lawyers did not realize how much of the information they were getting was coming from the library. As a result, we created pre-printed slips that identify the library and our names, indicating whether the item is FYI

> or As Requested. There is room to add comments. Each of us has a different colour, e.g., mine is pink. Although more information is being delivered electronically, this is still a visual reminder of where the information originated. On the information I send by e-mail, my full signature, including my position, is on everything, even though it is being sent in-house.

User testimonials

One librarian solicits and collects user testimonials on the value or impact of services or resources provided.

> I have starting "collecting" in an e-mail folder anecdotes of instances when the library was of assistance to a lawyers. Sometimes, this is unsolicited, but more often, I have to ask. Most recently, I used a new database service to obtain for a lawyer information that was not available anywhere else, in print in the library or on the web through a Google search. A week later, I e-mailed him to ask if the information was useful and to explain why I was asking. I got a prompt response back. I shared that e-mail with my director.

A submission with an eye-opening user perspective on the value of libraries was received from a prison librarian:

> It has been noted on a number of occasions, when prison riots occur, that the library and the school are left alone and not trashed. I believe that this shows that these entities are seen as highly valuable resources even by a rampaging clientele.

Statistics

Half of the submissions provided details regarding statistics kept by library staff – reference, circulation, in-house use, database usage, and website traffic – and how these statistics are processed and communicated to understand and report on how individuals are using the resources and services of the library.

> We collect monthly statistics – on questions answered, circulation, items shelved, and online database use – which are designed to measure how much the materials are being used and how many lawyers receive information from the library.

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We review all our usage reports for electronic services. In our main library, we use the loan statistics and physical reshelving stats to feed into our acquisition process. We tick each item that we reshelve using a different colour every year to capture in-library use and borrowing. (We do try to discourage members from re-shelving but we have not been all that successful, they want to be helpful.) For titles that are not core, this factor does influence our purchasing decisions.

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We gather the typical operational statistics for usage within the Library, with an eye to understanding what people are using if not necessarily the value they are receiving from use. These range from in-house circulation usage to how many reference interactions to how many Web site visits.

The measurements do not express value to the researcher, but can highlight trends for us. For example, our document delivery activity is trending down, as is our copier revenue. Nothing surprising there, as more lawyers research online in their offices or download rather than print when they visit us. On the other hand, it means we have to reassess our ability to do cost-recovery. It is also indicative that we are seeing fewer contacts with the Library overall. Both are troublesome from the perspective of showing operational value.

Like many libraries, we track reference by type of interaction (directional, ready, complex), source (lawyer, articling student), location, and method (e-mail, IM, in-person). Perhaps not surprisingly, most people who interact with our reference staff are lawyers (44%) from Toronto (93%) who walk in to use the Library (78%) and ask a ready reference question (56%). These are both strong numbers and weak numbers. While we handle nearly 35,000 reference requests a year, we are clearly not reaching the entire province well. Our IM numbers helped us decide to drop an expensive commercial chat product and go with a free IM tool. Fewer than 1% of our reference contacts were by chat, and the cost was unjustified.

We measure our online database usage pretty closely to understand how our researchers and staff use the databases. Reference librarians are broken out into their own "billing" group so that it is easy to see what our walk-in patrons are using and what our staff are providing to lawyers. These statistics have been helpful in discussions with legal publishers about what we license. They have highlighted that anecdotal evidence and discussions of best research practices are not consistent, in our library, with our actual usage, where secondary online content gets very low usage.

Our online statistics are more promising, for a couple of reasons. First, they establish growing use year over year. Because we are unable to adequately track walk-in traffic, this gives us an alternative, exact visitor benchmark. What we are seeing is substantial growth in online visits, almost doubling in the last year. More importantly, online metrics tools make it easier to tie online activity to online and offline efforts. For example, we can identify which advertising or promotional information about online resources is causing a particular spike because we know which advertisement or announcement went out on a day when we see a usage spike. We know that e-mail announcements about online resources, like our practice portals, are more effective than print announcements.

More importantly, online statistics are departmental-neutral. No-one else worries about internal circulation count, but every other department looks at their Web traffic. Web statistics enable us to show that the library is a heavily used resource, particularly the catalogue. When we partner with other departments on a project, like AccessCLE pay-per-view CLE materials or creating a real estate law research portal, online statistics can help us to show how the resource is being used. We still can't determine the value to the particular user but growing usage is a metric that other departments and senior management understand. Growth in online usage is something that can help in budget discussions or competing to get on a project schedule.

We are looking at using our online measurement tools in other ways. Google Analytics enables outbound click tracking. Since we provide a number of resources that are primarily links to other, substantive sites, this will enable us to see where people are leaving our site. That information can help us to develop more resources in that area or make that type of link easier to get to. For example, our online statistics show heavy usage of our Canadian case law page, no surprise there. But we have now added a CanLII search box to our home page, so that visitors who want to search Canadian case law can do so without clicking into the site. We are looking at Bit.ly, which is both a Web address shortener and an analytics tool, so that if we send out a link in paper or electronic format, we know exactly how many people clicked on or typed it in to their browser.

Focus groups

One library reported that they conduct focus groups before launching any new product.

Policy review

One submission described how regular review of its library use and collection development policies ensured that its practices continue to respond to user needs.

> In 2008-09 the Library completed a comprehensive review of its Collection Development Policy to validate with its core internal and external users those subject areas within the collection that may be accessed electronically without the need to preserve a print version in perpetuity. Based on a citation analysis of the references cited in (...) decisions released in 2008, 95.16% of law reports cited and 89.93% of journal articles/books cited are available in the Library's print collection. With the addition of electronic resources licensed to the Court, the Collection is able to meet the information needs of the Court 98% of the time, consistent with previous years.
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> In 2007-08 the Library reviewed its Library Use Policy and extended access to students enrolled in law faculties.

Library committees

One library reports that they maintain strong relationships with their users through library committees, and these committees are important communication channels for policy and budget development.

> We are fortunate to have champions and it may be that we successfully work with our library committees; there is a library committee for each court. An annual report is done for each committee to provide direction to the librarian for policy setting, budget direction and technology direction. A global report of achievements is given to the funder to highlight what work is being done by the unit to support the courts. We report on the initiatives that we have accomplished, significant donations to the collections, web work (public facing site and the intranet).

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