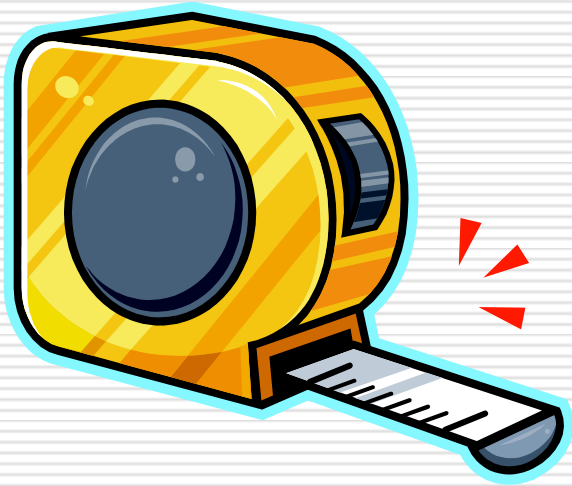


Measuring Your Impact: Using Evaluation for Library Advocacy



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Sponsored by the Medical Library Association

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Today's plan

- Agenda
 - Resources/Packet
 - Exercises
 - Housekeeping
-

outcomes

~~Workshop objectives~~

By the end of the workshop participants can:

- Understand the library's value in terms of the mission of the larger organization
 - Describe some tools used to assess the library, its users and stakeholders
-

outcomes

Workshop ~~objectives~~

- Identify the tools and methods used for data collection and analysis
 - Design an evaluation plan for a service in a library
 - Communicate evaluation results
-

What this workshop is *not*...

- ❑ Custom-tailored
 - ❑ A quick fix
 - ❑ One size fits all
-

Demonstrating the library's value



Why demonstrate value?

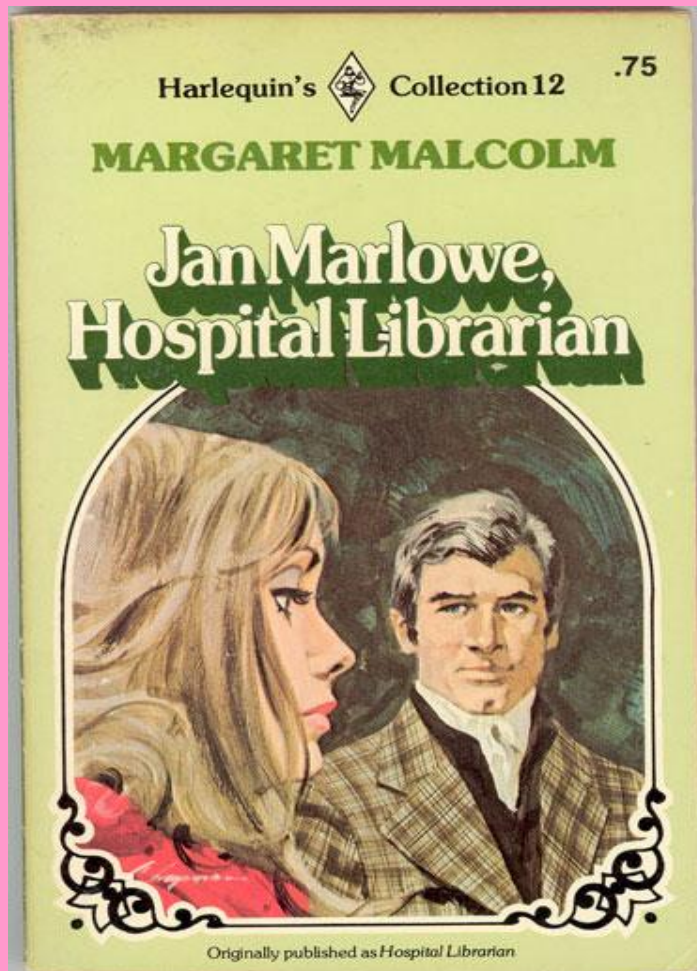
- ❑ To show the impact of the library on the larger organization's mission and goals
 - ❑ To show accountability for your resources; the library's contribution to the bottom line
 - ❑ To demonstrate that the library provides value-added services to solve staff problems
 - ❑ To use as an advocacy and marketing tool
-

How & what to evaluate

- What you decide to evaluate depends on:
 - What you need or want to know
 - What your users feel is important
 - What certain stakeholders want to have evaluated

 - Use “smallball” evaluation
-

Yesterday's Librarian



“That was one of the delightful things about her job. It brought her in touch with so many people, all – or almost all – of whom made her not only feel welcome but that she was doing something really worthwhile.

She gave a little sigh of pleasure as she unlocked the library door. She loved working here and she loved the work itself.”

From: Jan Marlowe, Hospital Librarian. Margaret Malcolm. Toronto; New York : Harlequin, 1976, (c)1960. Harlequin's collection ed.

Means, not ends

“Libraries are not ends in themselves, and they should not be supported because they have intrinsic value.”

Plutchak TS. Means, not ends. J Med Libr Assoc
2004 Jul;92(3):294.

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

Library service is value-added

- Medical Staff Support
 - Evidence-based clinical decision-making
 - Resource for patient education

 - Marketing
 - Health information outreach to community

 - Legal/Risk Management
 - Accreditation

 - Education and Research Support
-

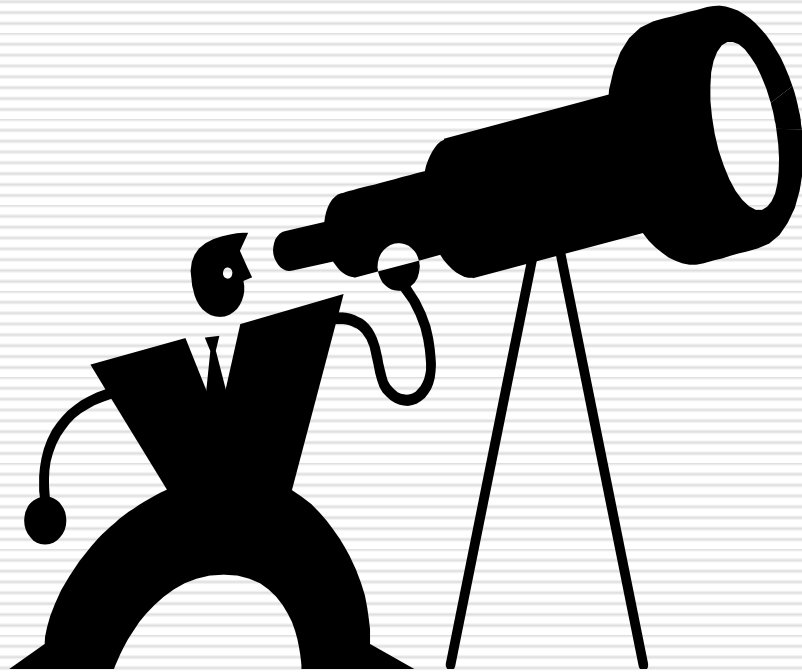
The big question!

What is the library doing to support the bottom line?

What you need is a plan

- Know the vision
 - Look at the environment
 - Create the plans
 - Collect and analyze data
 - Communicate the value
-

The vision



Start with the organization's mission

- Align the library's mission, vision & goals with the organization's mission, vision & goals
 - The library's value = library's contribution to achieving organization's mission & goals
-

Mission Concept

Organizational Goal

Clinical Care →

Provide excellent clinical care

Education →

Provide services, resources needed for teaching and learning

Management of operations →

Reduce corporate risk
 Increase profitability

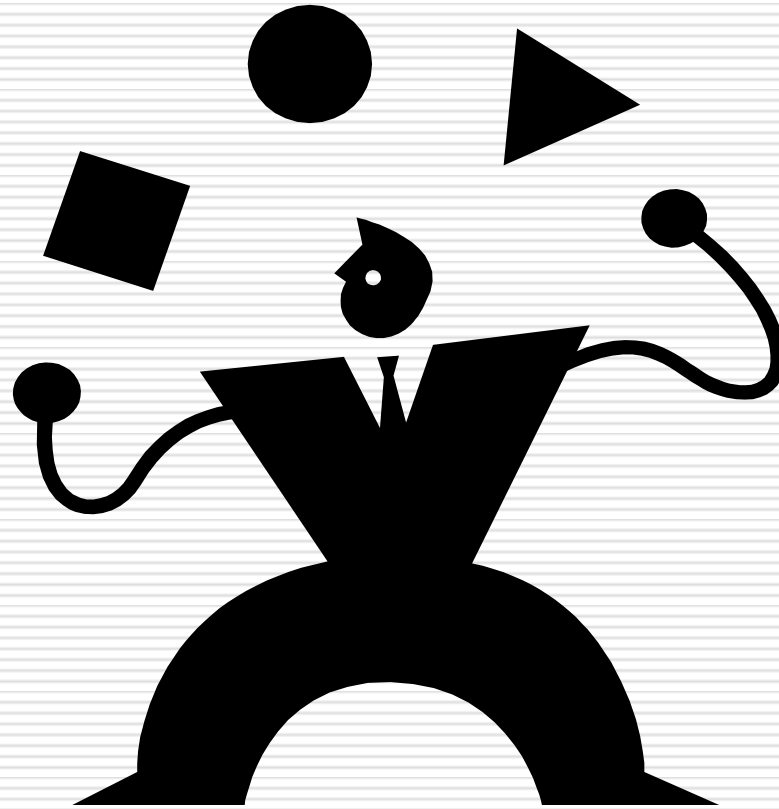
Service →

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.



The environment



Why look at the environment?

- ❑ Understand needs, desires and problems in context
 - ❑ Validate assumptions about your contributions and services
 - ❑ Provide a baseline for future evaluation
 - ❑ Help to develop the blueprint to plan and evaluate your contributions and services
-

Components of environment

- The organization
 - Your library
 - Clients/users
 - Stakeholders
 - The community
-

Assessing the environment

- User/stakeholder input
 - Surveys
 - Focus groups
 - Interviews
 - Unsolicited Feedback
 - Observation
 - Assessment by walking around
 - Library statistics and records
-

Get out of the library!

- ❑ Talk to people
 - ❑ Discuss information problems they are trying to solve
 - ❑ Show how the library can help
-

SWOT analysis

Strengths

Internal

- Positive statements about your library

Weaknesses

Internal

- Statements about what is lacking in your library

Opportunities

External

- What do clients want you to do that you are not doing?

Threats

External

- Factors that can adversely impact your library's goals



Wake up! Lunch time!



Plan Backward, Implement Forward



Where to go & how to get there

Goals

Outcomes

Activities and outputs

Resources

Goals

- Statement(s) of Purpose – why we do what we do and for whom
 - Examples:
 - Patients and their families will have improved health information literacy
 - Staff will have access to information for timely clinical decision-making
 - Acquisition of library materials will be cost effective
-

Goals are based on...

- The library's contribution to the organization's mission and goals

 - Environment
 - SWOT analysis threats and weaknesses as well as the strengths and opportunities
 - Other assessments
-

Outcomes

- ❑ Outcomes are changes in attitude, behavior, skills, knowledge or situation
 - ❑ Short, medium and/or long term
 - ❑ Intended or unintended
 - ❑ Positive as well as negative
 - ❑ S.M.A.R.T.
-

SMART Outcomes

- **Specific**: one or more web pages on the library website
 - **Measurable**: done or not; do staff access resources
 - **Action-oriented**: created and posted; staff access resources
 - **Realistic**: it is possible within the timeframe
 - **Timed**: “when” is articulated
-

Example

Goal: Staff will have access to information for timely clinical decision making.

- **Intermediate Outcome:** Health resources Web pages are available on the library website by the end of the project
 - **Long Term Outcome:** Staff can access health information through the library website
-

Exercise

Goal:

What is your goal?

Outcome:

What outcomes do you expect?



Activities and outputs

Activities

- What will you do?

Outputs

- How many did you do?
 - How many attended?
 - How many were distributed?
 - How many times was it used?
-

Resources

What you have

- Income
- Equipment
- Collection
- Etc.

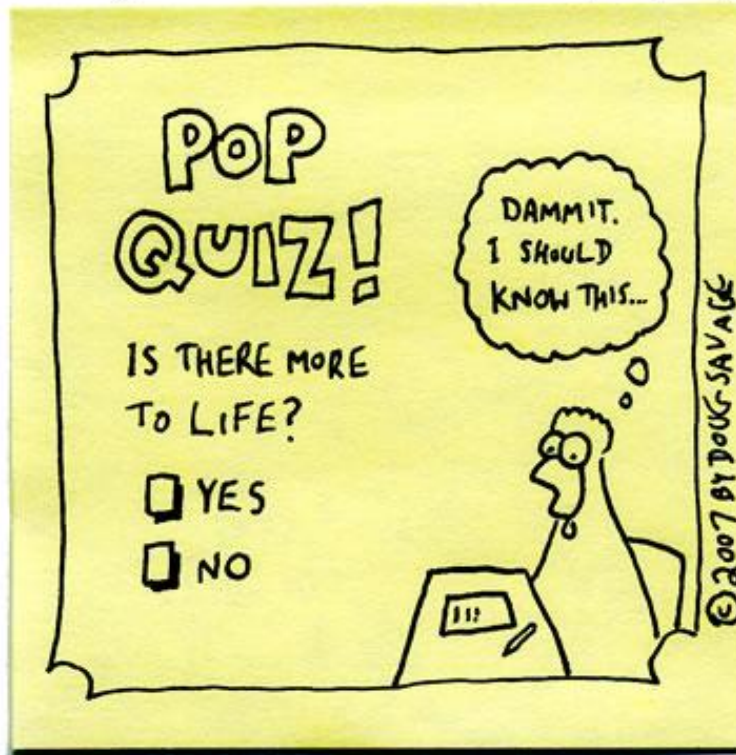
What you need

- Operating expenses (e.g., personnel, acquisitions, maintenance, etc.)
 - Funds for new initiatives or services
 - Etc.
-

A POP QUIZ!

Savage Chickens

by Doug Savage



www.savagechickens.com

POP QUIZ: What is a logic model?



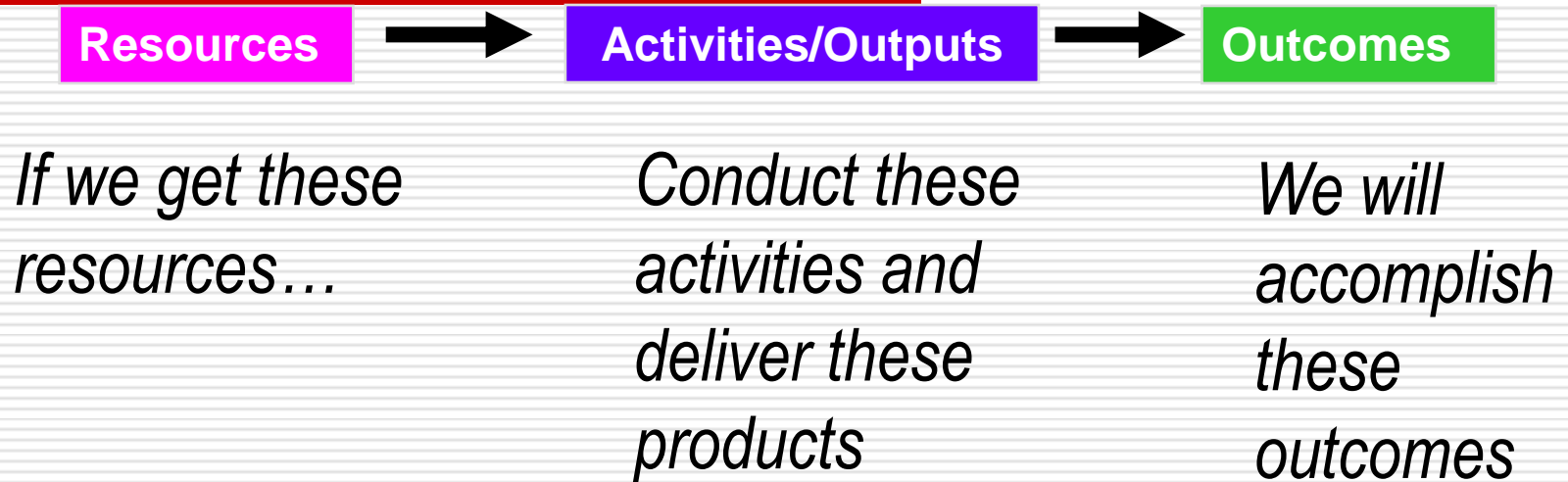
- ❑ A beautiful person who thinks deep thoughts
-

POP QUIZ: What is a logic model?



- ❑ A set of plastic pieces to assemble step by step
-

POP QUIZ: What is a logic model?



- A planning tool that links activities to results
-

The logic model

- ❑ Helps organize your thoughts – both before and during a project/program
- ❑ Provides a framework for planning and evaluating programs
- ❑ Clarifies intended outcomes
- ❑ Acts as a communication tool
- ❑ Good source for more information:

**W.K. Kellogg Foundation Logic Model Development Guide
(see class bibliography for link)**

Logic model worksheet

Goal: _____

Resources	Activity	Outputs	Outcomes



Sample logic model

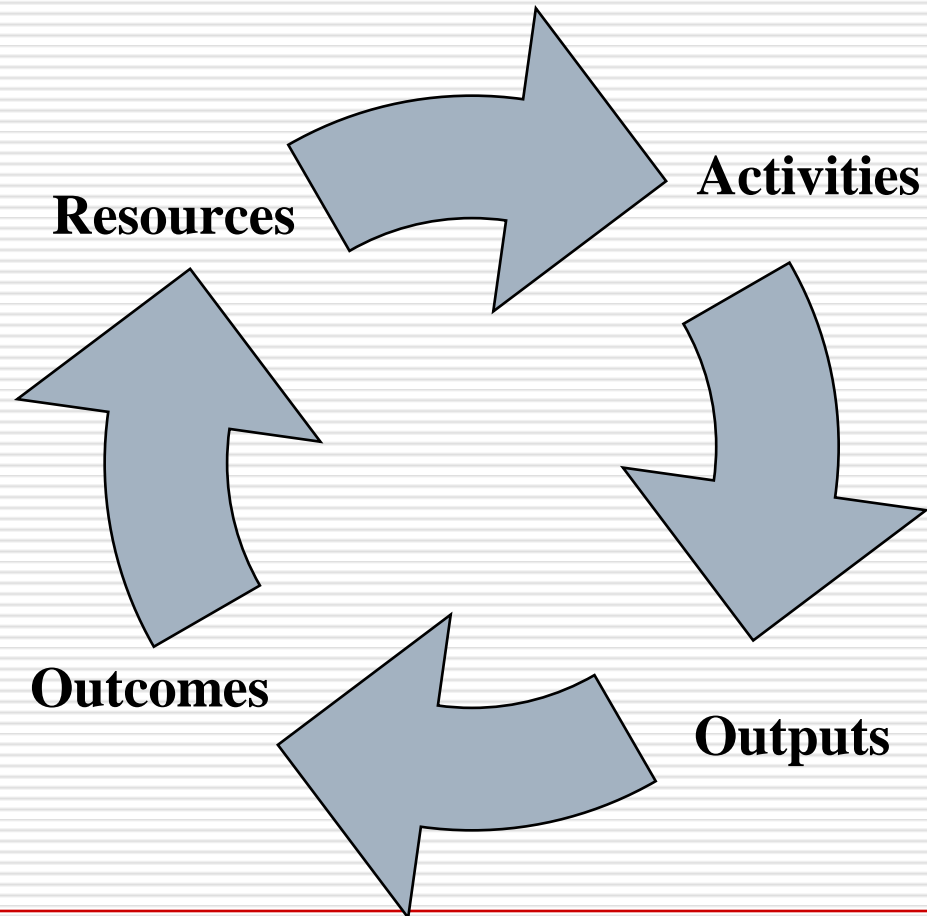
□ Goal:

- Acquire and manage information resources in a cost-effective manner
-

Logic model towards this goal

Resources	Activity	Outputs	Outcomes
<i>Personnel, money, expertise needed</i>	<i>What you will do</i>	<i>What your activity will produce – data, classes, brochures, etc.</i>	The SO WHAT – the benefits that accrue as a result of your program
Knowledgeable librarian	Select books and negotiate discounts	Selection list and optimal pricing	Reduce hospital costs by buying shared resources.
Budget	Purchase books	Enter PO and ensure access is active	Increase value of hospital expenditures by ensuring that ordered materials are received
Record keeping system and trained staff	Purchase books	Catalog records	Users know that hospital owns title

The model may change over time



Logic model group activity

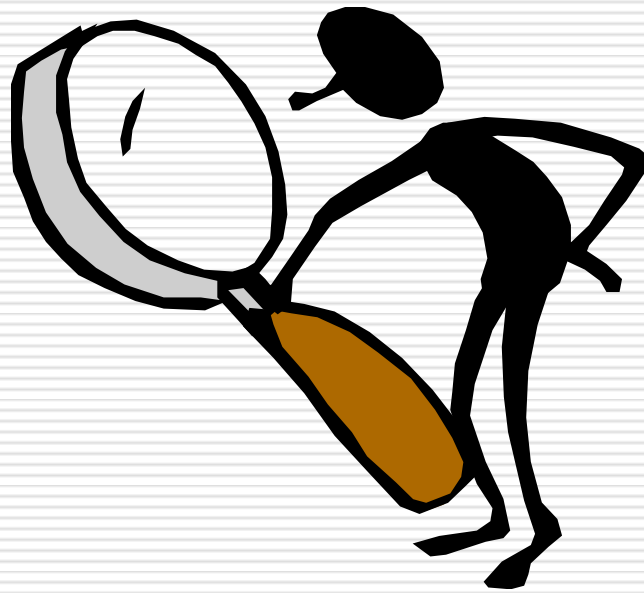
- Choose a goal
- Identify outcome(s)
- List
 - activities
 - outputs
 - resources



Sample goals

- Use one of your own goals
 - Or use one of ours:
 - Patients and their families will have improved health information literacy
 - Staff will have information for timely clinical decision-making
 - Acquisition of library materials will be cost effective
-

The evaluation plan



The evaluation plan

- ❑ Builds on the logic model
 - ❑ Evaluates success
 - ❑ Assesses value
-

Consider the purpose

- Who is your audience? This may be different than the beneficiaries of your services
 - Your users
 - Administrators
 - Fund raisers
 - How will the information be used?
 - Financial savings or justification
 - Intangible or non-monetary value of program benefits to community
 - Marketing and advocating for the library
-

What do you want to know?

Have you achieved your stated outcome?

“Reduce institutional costs by buying shared resources”

Pieces of the evaluation plan

- Indicators
 - How will you know you have achieved the outcomes?

 - Data
 - Sources
 - Methods of collection
 - Frequency of collection

 - Resources
 - Expertise or tools needed to collect and analyze data
-

Indicators

- “Indicators are the measures you select as markers of your success”

Logic Model Development Guide W.K. Kellogg Foundation

- Observable and measurable signs of reaching an outcome
 - Indicators are usually quantitative
-

Sources of evaluation data

- Existing records and statistics
 - Observation
 - User and stakeholder input
 - Survey results
 - Formal
 - Informal
 - The literature
 - Specialist or expert input
-

Data collection methods

- ❑ 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
-

Consider before collecting data...

- ❑ Indicators and outputs to be measured
 - ❑ Types of data to be gathered
 - ❑ Qualitative vs. quantitative
 - ❑ When and from whom
 - ❑ Focused on the users' perspective
-

Evaluation plan

Outcome (from logic model): _____

Activity	Affects Whom	Indicator	Target	Data Source	Data Analysis Methods	Data Collection Frequency
What is done to achieve outcome – from Logic Model	People involved in or influenced by activity	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	Affects Whom	Indicator	Target
<i>What is done to achieve the outcome</i>	<i>People involved in or influenced by activity</i>	<i>Measurable result of activity</i>	<i>Specific desired result</i>

Example part 1 (filled in)

Activity	Affects Whom	Indicator	Target
<i>What is done to achieve the outcome</i>	<i>People involved in or influenced by activity</i>	<i>Measurable result of activity</i>	<i>Specific desired result</i>
Select resources and negotiate discounts	Users, CFO, Educators...	Discount negotiated from list price	20% average discount

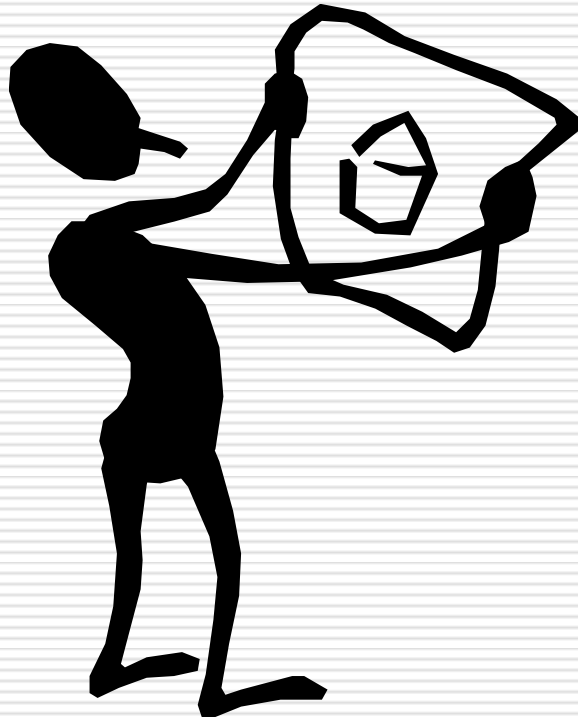
Example part 2

Data Source	Data Analysis Methods	Data Collection Frequency
<i>Origin of indicator measurements</i>	<i>Organize, examine, learn from the data</i>	<i>Date, time and intervals</i>

Example part 2 (filled in)

Data Source	Data Collection Frequency	Data Analysis Methods
<i>Origin of indicator measurements</i>	<i>Date, time and intervals</i>	<i>Organize, examine, learn from the data</i>
CFO, librarian, Accounting	Data recorded monthly throughout fiscal year	Spreadsheets

Now design your own evaluation plan

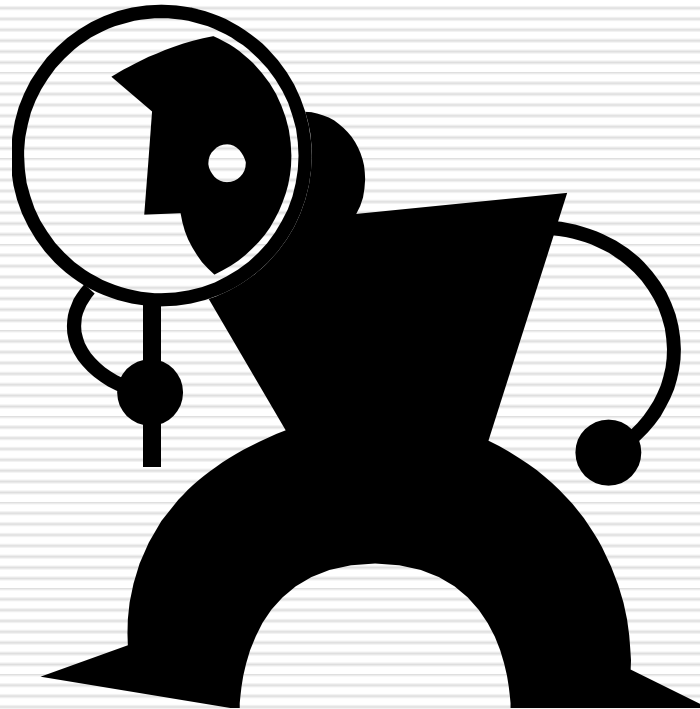


From your logic model...

- Select an outcome and describe:
 - An **activity** that will help achieve the outcome
 - Audience(s) **affected** by the activities
 - Indicators of outcome results
 - Targets for indicators
 - Data source
 - Data collection frequency
 - Data analysis methods



Collection and analysis



What to measure

“Not everything that can be counted counts and not everything that counts can be counted.”

Supposedly a sign in Albert Einstein's office

Make sense of the data

- ❑ 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
 - ❑ Go “smallball” if needed
-

Some analysis tools

- Benchmarking
 - How you compare to others of similar size and circumstance
 - A common measuring stick to evaluate process performance
 - Calculators
 - Use to illustrate the retail value of your resources and services
 - Cost/Benefit Analysis
 - Use to evaluate the benefits of a program or service
 - Return on Investment
 - How much your investment in the program or project earned for the company
-

Benchmarking

- ❑ Can improve your library's performance
- ❑ Can help you gain upper management support
- ❑ Can help prove the value of your library

<http://www.mlahq.org/members/benchmark/>
(from the MLA Benchmarking Network web page)

Benchmarking resources

- Your own library
 - The competition
 - Other hospitals/libraries in your system
 - Other hospitals/libraries in your area
 - MLA Benchmarking
 - AAHSL Survey Statistics
-

Library value calculators

- ❑ List of resources and services provided by the library
 - ❑ Estimated value of each item
 - ❑ Number of uses per month
 - ❑ Total is the sum of uses x value for each resource and service
-

A calculator from the MCRML

Value of Library Resources and Services			
Number of Uses	Library Resources or Services	Cost of Resource or Service	Value of Resources or Services
<input type="text"/>	Books used (in house or borrowed)	<input type="text" value="115"/>	<input type="text" value="\$ 0.00"/>
<input type="text"/>	Print journals used (in house or borrowed)	<input type="text" value="35"/>	<input type="text" value="\$ 0.00"/>
<input type="text"/>	EJournal articles accessed	<input type="text" value="35"/>	<input type="text" value="\$ 0.00"/>
<input type="text"/>	Interlibrary Loan Requests	<input type="text" value="18"/>	<input type="text" value="\$ 0.00"/>
<input type="text"/>	Reference Questions Answered	<input type="text" value="45"/>	<input type="text" value="\$ 0.00"/>
<input type="text"/>	Mediated Searches	<input type="text" value="75"/>	<input type="text" value="\$ 0.00"/>
<input type="text"/>	Class hours taught (# students x total class hours)	<input type="text" value="30"/>	<input type="text" value="\$ 0.00"/>
<input type="text"/>	AVs used or borrowed	<input type="text" value="50"/>	<input type="text" value="\$ 0.00"/>
<input type="text"/>	Self service photocopies	<input type="text" value=".10"/>	<input type="text" value="\$ 0.00"/>
<input type="text"/>	Meeting Room Use per Hour	<input type="text" value="50"/>	<input type="text" value="\$ 0.00"/>
<input type="text"/>	Hours of Computer Use (i.e. Internet, MS Word, etc.)	<input type="text" value="12"/>	<input type="text" value="\$ 0.00"/>
<input type="text"/>	Add another service or resource	<input type="text"/>	<input type="text" value="\$ 0.00"/>
<input type="text"/>	Add another service or resource	<input type="text"/>	<input type="text" value="\$ 0.00"/>
<input type="text"/>	Add another service or resource	<input type="text"/>	<input type="text" value="\$ 0.00"/>
<input type="button" value="Calculate The Value of Library Services"/>		<input type="button" value="Clear Form"/>	<input type="text" value="\$ 0.00"/>

Value of one month of services

Number of Uses	Library Resources or Services	Cost of Resource or Service	Value of Resources or Services
64	Books used (in house or borrowed)	115	\$ 7360.00
127	Print journals used (in house or borrowed)	35	\$ 4445.00
233	EJournal articles accessed	35	\$ 8155.00
150	Interlibrary Loan Requests	18	\$ 2700.00
74	Reference Questions Answered	45	\$ 3330.00
25	Mediated Searches	75	\$ 1875.00
2	Class hours taught (# students x total class hours)	30	\$ 60.00
17	AVs used or borrowed	50	\$ 850.00
2310	Self service photocopies	.10	\$ 231.00
6	Meeting Room Use per Hour	50	\$ 300.00
200	Hours of Computer Use (i.e. Internet, MS Word, etc.)	12	\$ 2400.00
5	Hours of web page design	75	\$ 375.00
	Add another service or resource		\$ 0.00
	Add another service or resource		\$ 0.00
<input type="button" value="Calculate The Value of Library Services"/> <input type="button" value="Clear Form"/>			\$ 32081.00

Your list

Enter the number of uses for each service or resource; enter the retail value you place on each resource or service. The value of services will be calculated for you. You may enter additional resource or services in the blank cells

Number of Uses	Library Resources or Services	Cost of Resource or Service	Value of Resources or Services
	Books used (in house or borrowed)	\$ 115.00	\$ -
	Print journals used	\$ 35.00	\$ -
	Ejournal articles accessed	\$ 35.00	\$ -
	Interlibrary loan requests	\$ 18.00	\$ -
	Reference questions answered	\$ 45.00	\$ -
	Mediated searches	\$ 75.00	\$ -
	Hours Librarian devoted to teaching	\$ 30.00	\$ -
	AVs used or borrowed	\$ 50.00	\$ -
	Photocopies made	\$ 0.10	\$ -
	Meeting room use in hours	\$ 50.00	\$ -
	Computer use by customers, in hours	\$ 12.00	\$ -
			\$ -
			\$ -
			\$ -
			\$ -
	Total Value		\$ -

Calculator applied

- I just gave the calculator a try. I think it's very easy to use. I pulled out my fiscal year 2007 annual report for the library and just started plugging in numbers. Some of my statistics don't fit exactly, but you've provided the ability to add our own line items. I think it's a great start. My first quick total came out to \$1,366,065.00. My budget for fiscal year 2007 was just under \$380,000.00. I'm meeting with my VP about next year's budget on Friday. I'll be taking this calculation along.
-

CBA: cost/benefit analysis

- ❑ The ratio showing dollar value of benefits gained for dollar value of costs
 - ❑ Use to evaluate the benefits of a program or service
 - ❑ Benefits divided by costs gives the value realized by transaction
-

CBA

BENEFITS ÷ COSTS

Or

BENEFITS
COSTS

ROI: return on investment

- Percentage showing the return (increase in value) on dollars spent to achieve a benefit
 - Amount the company's investment in a program earned for the company
 - Earnings on money spent
-

ROI

$$((\text{BENEFITS} - \text{COSTS}) \div \text{COSTS}) \times 100$$

Or

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

Preparing for CBA and/or ROI

- Select the program or service to value
 - Journal subscriptions

 - Identify benefits derived from program/service
 - Journal articles on staff desktops

 - Identify who gets the benefit
 - Library users

 - Convert the benefits to quantifiable terms (based on surveys and/or records)
 - # of journals used; # of articles accessed
-

Convert benefits to quantifiable terms

- Identify basis for valuing the benefits
 - Calculate \$ value of benefits: cost of a single personal subscription \$99 X # of subscriptions
- Identify and calculate costs related to producing the benefits
 - Cost of total number of subscriptions
 - Staff salaries, space costs, etc. to support the online subscriptions (overhead)

Matthews JR Internet Outsourcing Using an Application Service Provider: A How-To-Do-It Manual for Librarians. How-To-Do-It Manuals for Librarians, Number 110. New York: Neal-Schuman, 2002: 71-72.

Costing tips

- ❑ Consider tangible vs. intangible benefits
 - ❑ Be conservative in estimating benefits and liberal in assessing costs
 - ❑ Obtain administrative approval of the value of the benefits for each alternative; involve financial staff
 - ❑ Express benefits and costs in a value system shared by all parties – \$\$
 - ❑ Think about inflation and depreciation if study extends over several years
-

A CBA/ROI Example

Subscription to online
Fictional Medical Journal
at Anytown Institution

Fictional Medical Journal Online

- The library spends \$1600 for an institutional subscription to *Fictional Medical Journal* (FMJ) online
 - 7800 articles are viewed per year using the library's subscription
-

Assumption (for teaching only)

- Each person reads on average 2 articles per week
 - $2 \times 52 = 104$ articles per user
 - 7800 uses represents 75 users
 - $7800 / 104 = 75$
 - Without a library, each person who needed FMJ would subscribe at a cost of \$99 for online only
-

Benefit to the institution

\$7,425 (cost to buy 75 personal subscriptions: $75 \times \$99$)

-\$1,600 (cost for library to buy institutional subscription)

= \$5,825 savings for online institutional subscription



Value of the benefit

$$\$7425/\$1600=\$4.64$$

(cost of personal subscriptions /institutional subscription)

**\$4.64 of benefit for each dollar
spent by library on FMJ online**

Summary: benefit/cost ratio

- Cost: \$1,600 spent on FMJ
 - Benefit to the users: \$7,425 (value of 75 subscriptions at \$99/subscription)
 - The ratio of benefits to costs is \$7425K:\$1600K, or **4.64:1**, or **\$4.64** in benefits to users for every \$1 spent by the library
-

CBA of document delivery

- Document Delivery services
 - Librarian's time – hourly salary x .25
 - Fee charged by lending library - \$15
 - Pay per view
 - Patron's time – hourly salary x .3
 - Provider's fee - \$35 - \$65
-

Benefit to the institution

\$85 (cost for pay per view for patron's time and article cost)

-\$20 (cost for one ILL)

=\$65 savings for obtaining an article through ILL



Value of the benefit

$$\$85/\$20=\$4.25$$

(cost of pay per view /one ILL)

**\$4.25 of benefit for each dollar
spent by library on ILL service**

Calculating ROI

- ❑ ROI reflects the money realized by making an investment
 - ❑ ROI should be larger than the likely return on a bank account or certificate of deposit or some other investment instrument
 - ❑ Superior stock market return is 10-12%
-

ROI

- ❑ Benefits
- ❑ Less costs of carrying out the service or program (subscription cost **plus** staff cost)
- ❑ Divided by costs
- ❑ Multiplied by 100

$$\frac{\text{Benefits} - \text{Costs}}{\text{Costs}} \times 100$$

Simple benefits and costs

□ Benefits = **\$7,425**

(cost to buy 75 subscriptions)

□ Net cost = **\$1,800**

(price of an institutional subscription plus \$200 overhead)

Calculating ROI

$$\frac{\text{Benefits} - \text{Net Costs}}{\text{Net Costs}} \times 100$$

$$\frac{7,425 - 1,800}{1,800} \times 100$$

$$= 312.5\%$$

ROI of document delivery

- Document Delivery services
 - Librarian's time – hourly salary x .25
 - Fee charged by lending library - \$15
 - Pay per view
 - Patron's time – hourly salary x .3
 - Provider's fee - \$35 - \$65
-

Calculating ROI

$$\frac{\text{Benefits} - \text{Net Costs}}{\text{Net Costs}} \times 100$$

$$((\$60/3) + \$65) - ((\$20/4) + \$15)$$

or

$$\frac{\$85 - \$20}{\$20} \times 100$$

$$= 325\%$$

CBA/ROI exercise

- Select one service or resource
 - List all the costs associated with providing the service once or obtaining one resource
 - List alternative sources for that service or resource
 - List the costs associated with that alternative source
 - Plug the numbers into the formula
-

Communicating the value



Use the results...

- ❑ To communicate your value
 - ❑ To promote and advocate for the library
 - ❑ To maintain or get additional funding
 - ❑ As baseline information to show improvement over time
 - ❑ To improve library services and programs
-

Some communication methods

- Written and/or oral reports
 - Formal
 - Informal
 - Executive summary
 - Press release for newsletter or local paper
 - Promotional materials for the library
 - Staff meetings
 - Informal hallway or elevator talk
-

Communication tips

- ❑ Have others review the communications
 - ❑ Frame message in terms of added value to the mission and goals of the organization
 - ❑ Use figures, tables, graphs to make your point
 - Should be able to stand alone
 - Have a narrative to give more details
-

More tips

- Know and rehearse your message
 - Talk to administrators one-on-one when possible
 - Focus on benefits
 - Don't use library jargon
 - Educate, but don't bore
-

What sticks?

□ **SUCCESS**

- Simple
- Unexpected
- Concrete
- Credible
- Emotional
- Stories

(From: ***Made to Stick***. Heath, Chip. New York: Random House, 2007)

“Elevator talk”

- Simple, memorable mini-speech
- Ready for any brief encounter
- What your library contributes and why that matters

“Sadly and too often, the people who have the most influence over our future are really not all that interested in libraries.”

Elevator talk exercise

- ❑ Select an outcome
- ❑ Invent results
- ❑ Determine the audience
- ❑ Create a sound bite that highlights the value of the outcome to that audience



Go forth & evaluate

- ❑ Do smallball evaluation
 - ❑ Relate your value 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!*
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Want more information?

- Resources list for this class

 - The OERC Web site
 - <http://nnlm.gov/evaluation/>

 - Web resources for evaluation
 - <http://nnlm.gov/evaluation/tools/>
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