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Telling the Technical Services Story: Communicating Value (Presentation)

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Why this topic?

▶ *The Value of Academic Libraries: A Comprehensive Research Review and Report* (Chicago: Association of College and Research Libraries, 2010)

Use assessment to demonstrate value

But...

Don't we already do assessment? We already:

Collect and monitor statistics

Conduct quality control exercises

Review our workflows

Benchmark with our peers

Thesis

The practice of assessment can help you gather data and information that will help you:

- ▶ Advocate for technical services
- ▶ Demonstrate impact on the library, community, and profession
- ▶ Tell your story
- ▶ In other words: COMMUNICATE VALUE!

Agenda

- ▶ Why do assessment?
- ▶ Assessment landscape
- ▶ My research on technical services assessment
- ▶ Goals of assessment
- ▶ Assessment methods (e.g., Workflow assessment, Customer surveys, Focus groups, Benchmarking)
- ▶ Strategies for communicating value

Why do assessment?

- Gauge productivity
- Identify best practices
- Demonstrate accountability
- Advocate for additional resources
- Help set direction for division or department
- Communicate value or impact

Assessment

- Evaluation, estimation, appraisal
- Examples:
  - How satisfied are our customers?
  - What is our turnaround time for new orders?
  - How do our productivity goals compare with other institutions'?
  - Can we eliminate steps from this workflow?
  - How do we ensure quality cataloging?

Assessment landscape

- LibQual™
- ACRL *Value of Academic Libraries* report
- ARL biennial assessment conferences
- ARL SPEC Kit on Library Assessment

Most of these efforts did not address technical services, revealing a gap in the literature and an area that should be explored more fully

SPEC kit: *Library Assessment*

▶ Spec Kit 303 (Stephanie Wright and Lynda S. White)

▶ Assessment of technical services activities addressed in one question:

"Please indicate which of the following departments/units your library has assessed since 2002 and what methodologies were used for those assessments."

SPEC Kit: *Library Assessment*: Cataloging

- Cataloging: Number of respondents: 62
  - **Statistics collection and analysis: 69%**
  - Qualitative methods: 9.7%
  - Surveys: 4.8%
  - Usability: 1.6%
  - Other (Benchmarking, Unit cost analyses, Balanced Scorecard, Process improvement): 14.5%
  - Have not assessed: 24%

Survey proposals

- Survey ARL libraries (Declined)
- Survey the academic libraries in Pennsylvania to determine:
  - **Whether** they conducted assessment of technical services
  - **How** they conducted assessment
  - **How** they shared the results of their assessment activities
  - **What** actions they took based on their assessment activities

Technical Services

For the purposes of the survey, technical services is defined as units responsible for:

▶ Cataloging/Metadata

▶ Acquisitions

▶ Electronic resources management

▶ Preservation/Bindery/Physical processing

Demographics

- Survey sent to 120 Pennsylvania academic libraries
- 63 responding libraries (53% response rate)
  - 16 public universities (25%)
  - 47 private universities (75%)
- Average total employees: 13 librarians, 17 staff
- Average total technical services employees: 2 librarians, 4 staff

Results

- ▶ 90% of libraries reported assessment of technical services

- ▶ Gathering statistics was the most common form of assessment (84%)

- ▶ Cataloging and acquisitions were the most assessed departments; preservation the least

Goals of technical services assessment

- ▶ Improve or streamline processes (68%)
- ▶ Improve services (63%)
- ▶ Make better decisions (62%)
- ▶ Inform strategic planning activities (55%)
- ▶ Explore offering new services (40%)
- ▶ Reallocate staff or other services (30%)
- ▶ Compare with other institutions (22%)

How do you report the results of technical services assessment?

- ▶ Annual report (61%)

- ▶ Informational report to library administration (52%)

- ▶ Mass email to library employees (11%)

- ▶ Library newsletter article (8%)

- ▶ Presentations (8%)

- ▶ Web site (5%)

- ▶ Campus newsletter article (2%)

Outcomes reported

- Themes:
  - Streamlining processes
  - Staff reallocation
  - Changed vendors/Changed vendor services
  - Collection decisions
  - Training
  - Communication
  - New services
  - Changed integrated library systems

Assessment methods

- Statistics gathering and analysis
- Workflow analysis
- Customer surveys
- Interviews or focus groups
- Benchmarking

Statistics

- Reveal trends over time
- Changes in library collections focus
- Identify training needs
- Identify staffing needs
- Benchmark against peers
- Demonstrate productivity of staff and departments

Workflow analysis

▶ Most-commonly reported form of assessment in the library literature

▶ Examples:

　▶ Assessment of technical services workflow

　▶ Assessment of cataloging and database maintenance

　▶ Workflow assessment and redesign

　▶ Streamlining work between acquisitions and cataloging

　▶ Assessment of shelf-ready services

Customer surveys

Surveys can:

- ▶ Provide new information

- ▶ Corroborate anecdotal reports

- ▶ Support change, funding requests, or further assessment

- ▶ Help you identify service gaps or services that are no longer needed

- ▶ Serve as a public relations or marketing tool

Customer surveys

Goals of conducting a customer service survey at UAlbany:

- To gauge overall satisfaction with the Division and Department services
- Identify areas for process improvement

Potential concerns

▶ Will the survey be anonymous?

▶ What information will be shared?

  ▶ Will details be shared outside the Department/Division?

  ▶ What if someone comments on specific people? Will that be shared?

▶ What information will be published?

Survey design

▶ Introduction, including goals for conducting survey

▶ Five pages; one for each department and one general

▶ Department mission, name of department head

▶ Likert scale rating department on 12 factors

▶ Other common questions: communication, comfort in asking questions, suggestions for improvement or other feedback

▶ Questions pertinent to specific departments

▶ You can download the survey questions here: http://scholarsarchive.library.albany.edu/ulib_fac_scholar/35/

Planning

- May: Discussed at Department Heads' meeting
- June: Discussed at Division meeting; shared draft
- July: Shared draft with library administration
- August: Submitted IRB application
- September 5: Received IRB approval
- September 12: Survey deployed
- October 6: Survey closed with 52 completed

Actions taken and next steps

- ▶ Reported results at our Division meeting
- ▶ Discussed at our Department meetings
- ▶ Reviewed problematic procedures and policies
- ▶ Shared results at other library division meetings
- ▶ Created maps and signage for our Division offices
- ▶ Hosted a Division Open House
- ▶ Identified areas that need further assessment
- ▶ Published a paper
- ▶ Presented at multiple conferences

Library of Congress Survey on CIP data block

- Surveyed customers on elements to be added or deleted, data block layout, inclusion of e-book data

- 420 responses

- Results: more user-friendly, contemporary layout, more information for primary user group

Interviews with customers

- ▶ Informally as part of a periodic "checking in" with customers
- ▶ Example: Periodic meetings with subject library staff or other "customers" of technical services
  - ▶ Include as many staff of all levels as possible
  - ▶ Ask a set of standard questions
  - ▶ Document and report responses and discussion
  - ▶ Results: better communication with our customers and greater comfort level with asking questions

Focus groups

- A focus group is a small set of six to ten people who usually share common characteristics such as age, background, geography, etc.. **The set comes together to discuss a predetermined topic**.

- Suggestions:

  - Have a neutral party lead the focus group

  - Record and transcribe the comments

Sample focus group topics (Elhard and Jin)

▶ Do you find it easy to communicate with the three cataloging units?

▶ Do you ever use the Technical Service Division Web page to identify appropriate contacts to resolve problems?

▶ Are maintenance problems you encounter quickly resolved to your satisfaction?

▶ What do you find most confusing about what the cataloging units do?

▶ What do we do in cataloging that is the most helpful to your library?

▶ What one service would you like to see cataloging provide which is not currently provided?

▶ Is there anything else you would like to tell us about cataloging?

Benchmarking

Benchmarking is the process of comparing one's own policies, procedures or other factors, e.g., statistics, to other institutions for evaluative purposes or to determine best practices, goals, or standards

Benchmarking study on authority control

▶ Goal: use survey results to convince administration to support and fund the implementation of a vended authority control process

▶ Survey designed with SurveyMonkey

▶ Surveyed ARL academic libraries (ARL includes 125 research institutions in North America)

▶ 65 completed surveys

▶ Nearly three-quarters use vendors as a source of authority records and more than half use vendors to process current cataloging.

Methods of communicating the value of technical services

▶ Highlight accomplishments in annual reports

▶ Share informational reports with administrators

▶ Present at all-staff or department meetings

▶ Present at in-service days or other staff programs

▶ Hold open houses or tours of technical services

   ▶ E.g., *The path a book takes*

▶ Email staff announcing significant accomplishments

▶ Nominate TS colleagues for awards: institutional, regional, or professional

Methods of communicating the value of technical services (2)

- ▶ Technical Services newsletter
- ▶ Write articles for library newsletter or blog
- ▶ Submit news to professional organization newsletters
- ▶ Write for professional and scholarly journals
- ▶ Present poster at conferences
- ▶ Post on your institution's social media platforms
- ▶ Profile staff or specific accomplishments

Conclusion

▶ Communicating value through assessment happens by:

- ▶ Identifying a goal or problem

- ▶ Selecting an assessment method

- ▶ Sharing that information with all stakeholders

▶ Tell your story!

Questions?

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