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Articulating Worth: Communicating the Library's Value Proposition

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Abstract:

Libraries invest significant resources in collecting data and reflecting on the tremendous value they bring to their communities. Unfortunately, the message sometimes fails to have a significant impact beyond the safe confines of the assessment committee room.

This paper focuses, from a practical perspective, on strategies for communicating the value message to internal and external audiences (including senior library managers and staff, donors, campus administrators, etc). Some basic concepts, such as simplicity and conciseness, apply to all audiences while other factors must be tailored to the group being targeted. For example, senior leaders will be more persuaded by clear linkages to the strategic plan while campus administrators may be more compelled by rankings and reputation.

The author suggests that, to be truly effective, the library value conversation must be carefully planned in a systematic, creative and highly customized way. Libraries must identify the key stakeholders for a particular message, then map out the specific content to be shared and the specific approach or medium to be used for conveying that content to that audience.

Keywords: Assessment, Metrics, Communications

INTRODUCTION

Libraries often invest significant resources in gathering data and reflecting on the significant value they bring to their organizations. Unfortunately, traditional approaches (or "mediums") for communicating the results of library assessment activities are often very passive, dry and text-intensive. When shared at all, results are buried deep inside library web pages or printed and bound into lengthy reports, then duly forgotten. Practitioners tend to choose one method for communicating their results and then to rely on that one method for all stakeholder groups. As such, they fail to engage and inform key constituents of the library's value proposition in a language that is meaningful to them.

This paper suggests that neither happenstance nor humility have a place in the conversation. Libraries need to be deliberate and systematic in communicating the value proposition. They must exhibit great creativity to capture the audience's attention in an already noisy ecosystem. They need to be bold – sometimes even audacious – to convey an authentic belief that the information is important and that others want and need to know it. Most importantly, they need to tailor the message and the strategy used to convey that message to each individual user group.

The assertions draw considerably on personal experience and conversations with assessment librarians, library staff and campus leaders over many years. Examples are often taken from the author's home institution, McMaster University in Hamilton, Canada – not because McMaster has always done it right, but because the circumstances are close at hand.

Current Practices

Typical approaches to sharing the results of library assessment activity tend to fall into one of two categories. In many cases, library metrics are gathered, discussed within small internal groups, but shared in only the most limited way beyond the safe confines of the library assessment team. Conversations with practicing assessment librarians suggest a combination of factors may be at work. It is possible that library staff involved in assessment initiatives become consumed with the collection and analysis of the data and simply run out of time and energy to actually share the results more broadly. Good intentions fade away when the deadline for the next big survey rolls up. A lack of formal training in communication / public relations could also play some role: A recent study of 44 job postings for assessment librarians identified many frequently-requested competencies – but formal communication/outreach skills were not among them.[1] It is also possible that library staff may feel under-confident about the validity of their survey instrument or subsequent analysis. Alternatively, they may perceive, rightly or wrongly, a lack of interest in library metrics on the part of their campus community.

In other cases, library metrics are shared, but in ways which fail to engage the intended audience. Libraries tend to use a single approach to reach all stakeholder groups. The library may post a large data set (perhaps one written by a third-party vendor) – with very little additional commentary or analysis. Alternatively, they may share carefully-bound print

[1] Erickson, S. and S. Passonneau, "Core Competencies for Librarians with Assessment Responsibilities," 2014 Library Assessment Conference, Seattle Washington.

reports or lengthy email attachments with their user groups – then consider the consultation done. Regardless, they stop short of making the metrics meaningful to the organization. In doing so, they miss a singular opportunity to use data to tell the library's story.

The Need for New Approaches

The best approach to communicating the library's value proposition is considerably more robust and multifaceted. The strongest programs involve a deliberate and systematic approach to communicating out. Very little is left to chance. These organizations plan both the messages and methods for delivering them well in advance. A strong focus on creativity and inventiveness generate fresh new ideas that capture the audience's attention while remaining true to the essential message. Perhaps most importantly, these organizations are attentive to the needs of their various user groups. The same hammer cannot be used for all jobs. Libraries have many constituencies or stakeholder groups, both internal and external, and each requires its own messaging and its own strategy for getting the message out.

COMMUNICATING INTERNALLY

Libraries often spend limited time communicating the value proposition to internal audiences. This scenario is troubling. How can the library persuade key external audiences of its value when it has not adequately convinced the people within its own organization?

Speaking to Library Leadership

Conversations with managers and leaders about data and library value are not always easy. Assessment colleagues sometimes report some difficulty getting and staying on their management team's agenda. Meetings get cancelled when more pressing matters arise. Managers may ask few questions and provide only limited feedback on the results.

The situation, while frustrating, is fixable – but requires assessment team members to rethink how they package and present information to individuals at the highest levels within their organizations. One could argue that it's not a question of getting on the agenda once. It's a question of being asked back, again and again. It's a question of making oneself invaluable to the organization. A massive and unfiltered data dump is not the answer.

The following pieces of advice may seem, on first blush, to be obvious. But observation suggests that these concepts are not always followed. When they are, the results can be extremely positive.

1. Establish Clear Linkages to the Strategic Plan: Senior leaders care deeply about organizational mission and strategic directions. The metrics team's key role is to clearly and crisply articulate the linkages between the library's strategic plan and the data they have collected. Practitioners should be particularly vigilant about data collected out of idle curiosity. "Interesting to know" is not a good reason to collect or present data.

Also, practitioners should not assume that leadership team members clearly see the connection with the strategic plan - even if they were personally responsible for writing it. Senior leaders are busy people. The strategic plan, so carefully crafted two or three years previously, is no longer top of mind. Assessment staff are encouraged to quote the precise component of the plan that the data relates to. Lay those linkages out in tables - with arrows, distinctive fonts and colours. Point aggressively! Do whatever it takes to answer the critical question, “why should we care?”

2. Focus on Simplicity and Conciseness: Einstein once said, “If you can’t explain it simply, you don’t understand it well enough.” Strip down the data to reveal the core message and filter out the noise. Provide the detail for those few who want it, but don’t set the default view to an unfiltered mass of tables and densely-formatted text. Be courageous about identifying priorities and filtering large amounts of data into a digestible and meaningful message. Writing a 20 page report is much easier than synthesizing that same information down to a pithy 1-page summary.

3. Use Graphics to Create Visual Interest: One simple visual can make a large data set compelling and meaningful – but only if designed with care. Avoid complex chart types (e.g., radial diagrams that very few lay people truly understand). Default to the visual and put the hard data behind it for those who are truly interested.

4. Provide Preliminary Analysis and Recommendations: A big dump of data is helpful, but not nearly so helpful as a carefully culled presentation that focuses on trends and makes concrete (if even preliminary) recommendations for consideration. Again, senior leaders are busy people. No leader will be an expert in all the data being presented nor will she or he necessarily have had the time to scrutinize the data fully.

5. Available in Advance / Re-findable After: Large data sets that arrive at or just before the meeting will frustrate any senior leadership team. Make sure that the materials are available in advance – sent electronically to those who have time to view it. Have paper copies available at the meeting. Equally important….Make sure that the materials are re-findable after the meeting in a medium that’s easy to navigate and use. The senior leader who wants to track down that compelling fact should not have to search endlessly to find it again.

6. Establish a Regular Frequency for Updates: Strongly encourage a regular meeting with the senior leadership group. Remind the team that these conversations provide a singular opportunity to drive evidence-based decision making within the organization. The practitioner who has followed the first five steps and is routinely providing concise, strategy-focused data and analysis, will be a welcomed guest at most senior leadership team tables.

A Brief Aside: The McMaster Model for Library Metrics Using The Balanced Scorecard

McMaster uses the Balanced Scorecard as the framework for its strategic plan and the container for its key metrics.[2] This comprehensive performance management system, devised by Kaplan and Norton to encourage a "balanced" four-perspective view on an organization, requires clear linkages between strategy and metrics.[3] In keeping with the BSC approach, metrics are discussed each month by the leadership team in relation to specific components of the Strategic Plan. (Figure 1 presents the annual calendar for strategy and metrics conversations.) The discussion is led by the Director of Assessment and Accountability.

The presentation is stripped down and focused. Members of the Leadership Team are presented with a one-page summary of the entire Scorecard (see Figure 2) at each strategy meeting. Each metric is directly linked to a specific perspective. In each case, the organization is scored on its success in meeting its pre-determined target. The simple scoring is represented by stop sign buttons (Green = meeting target. Yellow = approaching target. Red = not meeting target). Each metric is presented as its own set of worksheets – but with the top sheet including a single graphic, table and score. Those interested in more details are welcome to read through the package but can otherwise get a clear snapshot of the situation from a single page view.

Figure 1: McMaster University Library Scorecard One-Page View (for use by the Leadership Team at monthly strategy meetings)

McMaster University Library Scorecard *(October 16, 2013)*

McMaster University LIBRARY

	OBJECTIVES	MEASURES	Score	STRATEGIC INITIATIVES*
USER PERSPECTIVE	**1. Integrate the Library into the University's Teaching, Learning and Research Mission**	1.1 New Content in Institutional Repository		Cloud Storage Digitization Institutional Repository
		1.2 Research Grants		
		1.3 Library Involvement in Student Learning (F2F)		Learning Support Library Services Staffing Model
		1.4 Library Involvement in Student Learning (Online)		Learning Support
	2. Improve discovery of and access to scholarly resources	2.1 Collection Satisfaction		Electronic Books Integrated Library System User Needs
		2.2 Downloads from the Institutional Repository		Institutional Repository
		2.3 Use of Licensed E-resources		Web Site Re-engineering User Needs
		2.4 Objects Digitized		Cloud Storage Digitization
		2.5 Electronic migration of serials		
	3. Create world-class teaching and learning spaces	3.1 Upgraded Classrooms		
		3.2 Satisfaction with Library Spaces		Accessibility User Needs
		3.3 Silent / Quiet Study Seats		User Needs
		3.4 Gate Count		User Needs
	4. Strive for exemplary service that is responsive to user needs	4.1 Service Satisfaction		Library Services Staffing Model User Needs
INTERN PROCE	**5. Marketing: Promote awareness of the Library's rich collections, state-of-the-art facilities and exemplary services**	5.1 Library News Stories		Marketing

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[2] V. Lewis, S. Hiller, E. Mengel and D. Tolson, "Building Scorecards in Academic Library Research Libraries: Performance Measurement and Organizational Issues." Evidence Based Library and Information Practice. 8 (2), 2013.

[3] R. Kaplan and D. Norton. The Balanced Scorecard: Transforming Strategy into Action. Boston: Harvard Business School Press, 1996.

Figure 2: McMaster University Library Annual Strategy Calendar

MONTH	TOPIC
September	Review User Perspective – Round 1
October	Review Learning & Growth Perspective – Round 1
November	Review Campus Engagement Perspective – Round 1
December	Review Financial Health Perspective – Round 1
January	Review User Perspective – Round 2
February	Review Learning & Growth Perspective – Round 2
March	Review Campus Engagement Perspective – Round 2
April	Review Financial Health Perspective – Round 2
May	Annual Review – Staff
June	Annual Review – Leadership Team
July	Annual Review – Leadership Team
August	Introduce updated scorecard and strategic initiatives for the coming year

Talking to Library Staff

Discussing library value with internal staff can be more difficult than expected. Data-intensive reports and presentations can be met with glazed eyes - even by the most enthusiastic staff members. Many colleagues are genuinely interested in library metrics and the broader issues of value – but a good number are much more focused on their primary work responsibilities. Front-line staff in particular can become frustrated by lengthy discussions of abstract value concepts when the issues facing them each day are big, thorny and, at least in their perception, not receiving the attention or resources they deserve. Lengthy lapses in the conversation exacerbate the situation with staff colleagues loosing the thread of the conversation or, worse yet, forgetting that they had ever been involved in the dialogue in the first place.

The focus on simplicity, conciseness and visual meaning described in relation to management holds equally true for staff colleagues. In addition, consider the following advice:

1. **The Rule of 7:** Harvard Business School professor Robert Kaplan's adage for communicating strategy holds great merit. To truly be internalized, key messages need to be communicated "seven times in seven different ways." This mantra does not suggest that the listener is unintelligent. Rather, Kaplan suggests that staff colleagues are busy focusing on their primary responsibilities and need repetition and variation to allow important content to resonate. Abstract concepts must be approached and circled in a variety of ways to truly capture people's full attention.

2. Recognize Staff Concerns: Workplace power dynamics sometimes result in staff members feeling concern about specific metrics and value conversations. A decision to collect data in a specific area might be construed as an intention to eliminate services or downsize staff. Colleagues may perceive hidden agendas associated with the themes or areas chosen for review. Some may desire more attention while others desire less. And when the data is released, findings relating to staff –related areas will be of supreme concern.

Practitioners are encouraged to be highly respectful and sensitive to their staff colleagues' concerns. Great care should be exercised in explaining the true purpose of gathering the data and engaging in the conversation. When the data is ultimately released, the practitioner should be prepared to provide considerable detail in the areas that directly relate to the staff members' work lives. When possible, data should be collected in a manner that captures the whole service continuum: For example, data on dwindling in-person reference statistics can be clustered with metrics showing the increasing demand for chat-based services.

3. Engage Staff in the Process: Staff colleagues are often very eager to be involved in identifying metrics. Engagement early in the process helps staff members understand the context of the conversation and be less apprehensive about why the data is being collected. Further, staff members are often the closest to the data themselves and can be instrumental in both identifying blind spots and understanding the true meaning behind the trends.

4. Choose Appropriate Mediums: Staff members typically have even less time than their managers to sift through lengthy reports and massive tables of thinly-analyzed data. The concept of emailing staff groups lengthy reports and asking for feedback within a prescribed time period is virtually guaranteed to fail. Typically very few staff will have the time to even open the files, let alone navigate through the data to find the key components that interest them. The result can be demoralizing and dramatically reduce interest or support in the values exercise.

Many organizations have found success with more engaging, hands-on activities. Best strategies involve face-to-face opportunities to work with the data in the company of their colleagues. The concept of making metrics "fun" should not be ruled out of hand. (At the author's home institution, some success was achieved with metrics workshops where groups of staff were given clusters of data and asked to formulate their own conclusions and recommendations. In addition, a Strategy Fair was held with booths set up for each key strategic initiative – complete with popcorn and music.)

COMMUNICATING EXTERNALLY

Libraries often fail to communicate out about key metrics to their external communities. Very few organizations put their assessment plans in a public place – let alone the actual data emerging out of these various initiatives.[4] When documents are shared, the reports are often scoped at a high level and generated by third-party providers with minimal local analysis and recommendations. To make matters worse, the reports are often buried so deeply in library websites that they are virtually invisible.

Many reasons can be surmised for the poor showing. Sheer lack of time is always a key factor: Staff members spend copious amounts of time planning and administering the

[4] Some university libraries, such as Cornell and McGill, do put their assessment plans up online.

instrument, then run out of energy when it comes to sharing the results. Lack of confidence about the validity of the instrument and the accuracy of their analysis, already identified as a concern in relation to internal communication, is magnified many fold when considering external audiences.

Libraries' tendency to treat external stakeholders as a single group exacerbates the situation. Finding common ground within library staff is hard enough. Using a single message to reach out to a diverse external audience is almost impossible. Enhancements to study space will be highly valued by students but far less so by faculty. The deans and the Provost may be far more concerned about the Library's contribution to the university's teaching mission. Library donors may have a strong focus on reputation.

Finally, fear of making the library look bad also comes into play. Metrics, if designed effectively, will identify both an organization's strengths and weaknesses. Some organizations shy away from sharing bad results for fear of negative implications (reduced funding, diminished reputation, etc.) Reporting out at a very superficial level may help hide the warts.

Once again, the remedies for some of these issues are simple – at least in principle. Organizations have found good success through the following strategies:

1. Use a Segmented Approach to External Communication: Effective communication does not happen by luck. Successful organizations plan the communication strategy for key assessment initiatives in a deliberate and systematic way to ensure that efforts are being expended where they are most needed. The plan identifies and prioritizes each stakeholder group (perhaps flagging them as high, medium or low). The library then identifies the key message(s) to be conveyed to each group, and the key strategies ("mediums") for communicating that message to that group. As shown in Figure 3, the content and the strategies can be very different for different stakeholder groups. The results that are well received by one group can be of great concern to another. The video blast to students could be construed as unprofessional to faculty or senior campus administrators.

The sheer act of deliberately crafting such a document uncovers critical problems. For example, a library might determine that faculty and deans are the key stakeholder group for a particular message - but discover through this systematic review that all the communication tools are being directed to the groups libraries typically prefer talking to - students and library staff.

When possible, data should be segmented by stakeholder group to allow readers to find the information that relates to them. Rolling groups together (for example, clustering undergraduates and graduate students together) may neutralize problems and make the library results rosier – but may be masking the true nature of public perceptions.

As well, prepare more focused pieces on the results from key stakeholder groups. A series of two or three well-timed articles, each featuring the value statement from one specific user group perspective, can be a powerful vehicle for capturing the library's value. The content is more targeted, concise and easier to digest.

Figure 3: Communication Matrix for Library X's Survey of Undergraduate Study Space

PRIORITY LEVEL	STAKEHOLDER GROUP	KEY MESSAGE	STRATEGY
High	Undergraduate Students	Thanks for filling in survey. 10 key findings	Video blast to all students. Presentation to Students Union
High	Library Donors	5 key areas we need additional funding for	Letter from the University Librarian Presentation at donor event.
High	Campus Space Committee	10 key findings with costing	Full report with recommendations and costing. Presentation to committee
Medium	Graduate Students	Key findings that might relate to graduate students.	Presentation to Graduate Council.
Medium	Deans and Directors	5 key findings.	Story on library website. Letter from the University Librarian.
Medium	Library Staff	10 key findings	Presentation at staff meeting.
Low	Faculty	Key findings. Any areas of shared concern with faculty?	Story on library website.
Low	General Public	Top 5 findings	Story on library website

2. Build Web Visibility: The Library's public website is its primary tool for communicating with external audiences. Key metrics should be readily findable from the library's public website. Once found, the data and analysis should be presented in an effective and meaningful way. Once again, detailed data should be available, but should rarely be the default view. Shortcomings should be acknowledged with some sense as to how the library intends to move forward.

The McMaster University Library's scorecard is considered public document. New data is posted to the scorecard as it becomes available – even when the results are disappointing. In fact, the metrics and targets are reviewed each year. If the results are too positive, the targets are raised with the expectation that the organization will always be aspiring to be better than it is. In some cases, the library recognizes that the metrics chosen are fairly unsophisticated (e.g., total gate count). The library has made a conscious decision to share available data rather than wait for the perfect metric (which may never actually emerge).

3. The Human Touch: Actively seek out opportunities to talk about library value and related data to a variety of stakeholder groups. Do not expect to draw big audiences to special meetings in the library. Rather, identify pre-existing groups and lobby to get time on their agendas. Be respectful of each group's time. Get carefully crafted and concise materials out to each group in advance. Ensure that both the data and the presentation are customized to the group in terms of both content and approach.

CONCLUSION

Libraries invest significant resources in collecting data and reflecting on the tremendous value they bring to their communities. Unfortunately, the message sometimes fails to have a significant impact beyond the confines of the assessment committee meeting room. For a variety of reasons, both known and only surmised, the value message is sometimes not shared at all. If communicated out, it is often buried deep inside library web sites or lengthy and dry printed documents.

Some general concepts hold true regardless of the audience. Virtually every group, both internal and external, has limited time and attention to spend on library data – regardless of its importance. More is not better. Content should be presented simply and concisely, with the core message positioned clearly up front. The value added is the insight and recommendations – not the sheer volume of words and numbers. One carefully designed graph or chart is worth far more than pages of unfiltered data.

To be truly effective, the library value conversation must be carefully planned in a systematic and deliberate way. Libraries must identify the primary stakeholders for a particular message (not based on their traditional support of the library but on their need to receive the information). The specific content to be shared with each group should be mapped out with precision. Who needs to be thanked for participating in the survey or focus group? Who needs a full review of all key results and who needs a targeted message relating to one or two critical points? And finally, what is the most effective medium for conveying that message to that community? Where is a text-based report the best option and where would an in-person meeting or online video have a bigger impact?

Specific advice is provided for working with various groups. The library's own leadership team will appreciate clear linkages to the strategic plan. Library staff groups may want more access to the data itself and more insight into the components with direct relation to their work lives. Senior campus administrators may be primarily concerned with external rankings and reputation. Delivering the content stakeholder groups need will help ensure that the library's value message is heard.

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