

Live Long and Prosper: Demonstrating the Value of your Information Service

This article by Susan Mansfield describes a number of techniques, which can be used in isolation or together, to demonstrate the value of an information centre.

Introduction

There are a great many ways the information centre can help an organisation achieve its goals. For example, by providing customer-focussed service offerings and getting involved in knowledge management initiatives to create a more efficient and effective workforce or by providing value-added services to external clients as a profit centre. These activities demonstrate the necessity for the information centre but not always to the key decision-makers and not always enough to support its long-term future, especially when times get tough.

The BIALL Conference in 2004 had as its theme the role of the legal information profession in changing times. Times had indeed been changing and colleagues were being hit with much reduced budgets, downsizing of their information centre's activities and redundancy. This prompted me to offer a paper to the conference taking the form of a practical toolkit of techniques that could be used to demonstrate the value in what you do. It drew heavily on a number of books and articles which are listed as further reading. This article reproduces that paper. Every information centre will be different so you must determine what your own organisation's management values, and how they will know it when they see it, then choose the techniques that may help. Each technique could be the subject of its own article so you may wish to do some further reading as necessary.

Communication

Communicating with busy senior people can be quite intimidating so you need to be prepared, determined and assertive to make the most of your opportunity. Know what you are going to say and develop a "lift speech" so that whenever you have 20 seconds or so of serendipitous one-to-one time with a senior manager you have a sales pitch ready. You might ask if they have heard of a new service you have recently launched and offer to drop

by their desk to demonstrate it to them or ask their opinion about something you are doing or just show off a great achievement you made recently. Keep your lift speech up to date and maybe even have a few depending on the circumstances and at what floor the senior manager alights. Get off at the same floor and extend your lift speech along the corridor for a vital few extra seconds.

More formal written communication can take place in business plans. If your organisation has an established planning cycle with documentation then ensure that you have a section within this. If that isn't possible then develop your own document including your overall aims and objectives, which must support the business objectives of your organisation, your strategic thinking for the next few years to deliver these aims and your operational plans for the forthcoming year with resource implications. Ask to present quarterly updates to management meetings. Better still recruit your own information services strategy group of senior managers endorsed by management and empowered to make day-to-day decisions on behalf of management. If an information strategy group already exists, perhaps with an ICT focus, then see if you can encourage some clear thinking and bring your issues to that group. If you just can't get an audience with the Board then brief your manager regularly with information to pass on. Engineer chance meetings, just don't get yourself a reputation for stalking, and use your lift speech so that other Board members or those who have the ear of the Board might be prompted to ask your manager something.

Collect user feedback and stories about your successes. Save notes and emails of thanks and comments from surveys. Document verbal feedback or encourage the person to put it in an email to you, or even better, your manager. Solicit case studies and ask probing questions such as how the response your centre gave impacted a project, did it help win a contract or client or a save a specific amount of money or how long would it have taken the requester to identify the information for himself. Storytelling is an extremely powerful way of

illustrating your points and works much better than bland facts and statistics. Use these stories in your lift speech and reports, on your publicity material and wherever else you can.

Presentations

Presentations are a major opportunity to showcase what you do or get buy-in for what you'd like to do. Again – be prepared and know what you are talking about; show your enthusiasm and passion for what you do and come across as knowledgeable. Practice in front of an audience if you are not used to presenting. Try out your presentation in front of a “friendly” prospective audience member to get their feedback on how their colleagues are likely to react and what kind of questions they may ask. Refine your presentation in light of this and counter issues before they are raised. Be sure you keep it simple and go slowly, clearly and concisely; importantly use common language not jargon. Use examples of what it will look like, feel like and sound like when your objective is delivered and quote success stories. Talk about solutions not problems and know the financial and other resource impacts. Give them time to ask questions and don't over-run. Leave further information behind or circulate it in advance if necessary. With really important presentations, where you may need the audience to approve what you are recommending, try to have a pre meeting with each of them individually and go through the issues answering their questions in advance. Get them warmed up and receptive before the actual meeting.

Never start your talk apologising for what you are about to do, not about its length or content or appropriateness or anything else. As soon as you start apologising you have created a negative perception and that's before you have even begun. You'd be amazed at the number of people who create just such a negative preface.

Reports

You need to keep track of what you are involved in and your progress towards goals to show your worth. Set and agree objectives with your manager or the Board. SMART objectives are: specific, measurable, achievable, relevant and timely. You only need one or two measures but they should be important to the organisation.

Be an integral part of the bigger picture and scope defined pieces of work as projects with critical paths and milestones, break down the work activities and allocate responsibilities. Highlight dependencies to other projects and activities and monitor your progress against plans. Microsoft Project is very easy to learn and use for project planning but you can just as easily use Excel for charts and presentations.

Write a monthly report outlining your achievements for that month such as projects or objectives completed

or major milestones reached, joint projects with other departments or staff development. I particularly like the ABCD format, which I learned from a colleague at HM Treasury. It is one landscape page split into quarters headed Achievements, Benefits, Constraints, Do Next. Its brevity means it is likely to be read and it forces you to concentrate on highlights. It may provoke dialogue and thus give you the opportunity to report more broadly on the issues. Whatever your format, only include what management cares about and will understand. Use diagrams or graphs to illustrate your points.

If you have new ideas you need to gain support for these first and informal one to one sessions are probably best. Understand whom you are communicating with. Does the grand picture or lots of evidence and detail persuade them? Do they want a flipchart drawing or a weighty report? Once you have initial interest write up your proposal to get a formal mandate to proceed and keep checking back to it to prevent scope creep. In larger projects or those over a longer time frame you may wish to submit project summaries and monthly project reports to highlight progress.

Statistics

You need to count a great many things to evidence what you do but only by combining these raw statistics can you show what value you add and what could be achieved. Luckily software can help you in the collection and analysis of these figures. You don't need bespoke solutions and you can rely on desktop tools such as Excel or Access.

You may need to record transactional information such as numbers of items ordered, checked in, circulated, borrowed or processed. You may like to know the number of enquiries made or searches performed and the type of request or the department asking. Importantly you need to record the time spent and if your organisation has an effort recording system see if you can use this adding your own effort recording codes if necessary to reflect what you do. If you make a charge for your services this should be captured as well.

You can then use this data over time to show volume changes in transactions or requests and time savings made. Include statistics in monthly and annual reports to support your points and break down by department if appropriate. You can see who is really using the information centre and what services are most highly used, although you should remember and acknowledge that raw statistics don't actually show if you are cost effective, contributing to the organisation's overall objectives or adding value by providing such services in the first place.

Performance indicators

Performance indicators can also be referred to as performance metrics, key performance indicators,

performance measurement and critical success factors. Performance indicators are not statistics, they are quantitative measures that combine statistics to create much more powerful measures. The key to using performance indicators successfully is to resist the temptation to measure too much or to end up measuring things that aren't actually important to management. Things that get measured get attention so make sure you choose measurements linked to your strategy, which show how you support your organisation's objectives.

You can use combinations of such things as: resources assigned to the information centre for example collection size, number of professional staff, annual budget etc.; the processes and activities which turn resources into services, such as the cost of ordering a book, or the cost of receiving a journal; or the direct products generated or how much the information centre's services are being used, such as number of requests received, number of visitors to the library, number of books lent or journal articles delivered.

So, for example, if you combine the resources assigned with the products or services generated as a result you can develop efficiency indicators or operational performance indicators such as the cost per enquiry answered. Other examples might be:

- Spend on information per user (you could even compare this to spend per user on something else)
- Registered users you have as a percentage of the population
- Average number of enquiries answered per user or per head of population
- Failure rate per number of enquiries

These measures indicate the volume of activity but say little about its "goodness". To try and show the impact of the information centre's services on the business, you need to look at the uses made by a customer of your products and services and the degree of satisfaction felt with the outcome. However several parallel activities can impact on an outcome. An increase in information literacy might be the result of your internal training programme but it might also be the result of a policy change in recruitment practices to recruit only literate staff. It can be notoriously difficult to assess just the information centre's role.

Cost benefit analysis

It may not be easy to show in a quantitative way the information centre's value, influence, innovation and value-add, but presenting senior management with pound signs is usually a very powerful argument that speaks their language and makes your value self-evident.

Cost benefit analysis (CBA) calculates the cost of providing information in relation to the value gained from its provision to show its true value. You can do CBA before undertaking a project by using estimates, or after by measuring past costs and realised benefits.

The most common CBA models are:

- Return on investment – the cost of providing information in relation to the derived benefits
- Present value analysis – the cost of the service compared to its future estimated annual rate of return
- Payback period – how long it will take before the profit pays for the cost of the service compared to the estimated life of the service

The use of these models is not easy in information centres which tend to be not for profit departments. You may recover your costs but that is not the same as generating a profit, which must be a completely new income stream for the business. And the benefits derived from information services are particularly difficult to quantify. Asking users directly about benefits is unreliable - they don't usually know and often overvalue, but you need to place a pound cost here somehow. You can measure benefits as a decrease in costs in other areas and probably need to use a blend of both methods. Even the costs are hard to calculate accurately, direct costs such as the cost of a subscription or the cost of equipment are straightforward but indirect costs such as staff time assisting clients, training, troubleshooting etc. are much more difficult. When you consider the nature of costs and have to account for fixed costs which will not vary, variable costs which change in direct relation to output and marginal costs which measure each additional unit of output you can see that CBA is a time consuming exercise.

By way of example you might wish to compare the cost of providing full text access to a database with the cost of subscribing to the journals within the database. You may need to take into account the cost of subscribing to the journals, the cost of subscribing to the database, the cost of increased hardware or software, the savings from increased shelving space and processing of journals and related invoices and the benefit of being able to access more journals in the database than the library actually subscribed to in hard copy.

Activity based costing

Activity based costing is a tool first used in the manufacturing sector, which can be applied to information centres. It makes it possible to work out the true cost of a product or service and is useful in making resource decisions or assisting in budgeting, forecasting and performance measurement. It is particularly useful in information centres where there is a diversity of products, processes and customers and there are significant overhead costs not easily assigned to individual products. Information centres may have to work harder to define their products, which are not as tangible as in manufacturing, but the process is quite straightforward although it can be time consuming and should not be undertaken lightly.

First you need to define the major cost types such as staff, premises and ICT etc and the costs against these. Then you should define the major processes such as

acquisition, information access and supply and activities such as selection, cataloguing, assisting customers and managing the library system. Lastly you need to define the services or products offered to clients such as view periodicals, full text access, borrow books, use workspace and search assistance. Then you can allocate the costs to the activities and assign the activities to the products.

If you take an online database search as an example, the things you might need to include would be the direct labour hours, the online database charges, the computer you use to access the database, its maintenance, software maintenance, the electricity which operates it, the chair you sit on, the training you received to operate the database, the space you occupy, depreciation etc. Each element may have to be worked out individually such as computer maintenance, which may be determined by the number of research questions answered to give a cost per question. You need to use the total capacity to answer questions, not the expected number of questions otherwise you charge excess capacity to individual products which will inflate their cost.

Balanced scorecard

So far I have focussed on process measures and outcome measures but pushing process improvements and doing more things faster or cheaper isn't necessarily indicative of the bigger picture. You need to show you are doing the right things, and there is a way of taking non-financial measures into account.

You can communicate both value and performance using a balanced scorecard, which lets you see if improvements in one area have been at the expense of another, and represent several perspectives simultaneously. You can consider quite disparate elements together such as becoming more customer focussed, shortening response times, improving collection quality, emphasising teamwork and developing new services. The balanced scorecard is based on the understanding that no single measure can assess all key areas of the service.

The traditional scorecard is based on answering four questions:

- How do customers see the information centre? (customer perspective)
- At what must the information centre excel? (internal perspective)
- Can the information centre continue to improve and create value? (innovation and learning perspective)
- How does the information centre look to stakeholders? (financial perspective)

A revised scorecard including the information centre's physical collection, access to electronic databases and resources obtained from elsewhere such as document delivery services may be more successful in government and not-for-profit organisations.

You formulate targets in each of these areas, about three to five measures in each, and design measures for each broad strategy you have chosen for your information centre.

- Customers tend to be concerned with time, quality, performance and service and cost.
- Managers tend to focus on critical internal operations enabling them to meet customer needs such as the time and cost of processing new materials or the cost and quality of document delivery.
- The innovation and learning perspective looks at the library's ability to grow, learn, develop and introduce new services and will focus on the introduction of new services, the technological infrastructure and the skills of library staff.
- The financial perspective will vary according to your sector: in government and not-for-profit profitability is often not relevant. However, in all sectors the aim is to demonstrate you make effective use of the funding provided.

Using a balanced scorecard and its multidimensional metrics based on your strategies will change the focus on performance away from what you have done to what you seek to become.

Baselining and benchmarking

Benchmarking can sometimes be used erroneously when the speaker means baselining. Baselining is a useful tool in its own right where you, exactly as the term implies, set a baseline against which you measure. This can be by acquiring a baseline from other organisations or by measuring a baseline in your organisation before you implement a change in order to measure it again after the change and see the difference.

Benchmarking is a much more involved process where you identify, understand and adapt outstanding practices and processes from competitors or organisations which are considered leaders in their field to help your organisation improve its performance, identify industry trends and foster new ideas for service development. It is a formal exercise which requires time, a budget, careful planning and preparation. You need to be committed to its success, have the support of your senior management, know yourself, your customers and your organisation and choose partners who are also committed. If you can't engage in a formal benchmarking project you might still be able to access published or informal information on comparable information centres and you might be able to find best practices internally in other departments.

Stakeholder management

Stakeholder management is a very useful tool to help you manage your key stakeholders: those who depend on

your services in their work; those who might lobby for you or consider you an unnecessary overhead; those who have the ear of the board; those who have had good or unfortunate experiences of using your service; those who don't use you at all; those who are friendly or hostile to you etc. You can't manage everyone so focus on key people who can have a significant impact on you or close you down.

Start with stakeholder mapping, identify the key people and plot them on a spreadsheet or list using the x axis to reflect their current support and the y axis to reflect their level of influence. Then plot realistically where you would like these people to be in terms of their support in say six months and develop a stakeholder management strategy to move them along the axis. A stakeholder map would usually not be shared outside your own team and should be revisited periodically and amended - as the political climate in your organisation changes so will some of the stakeholders. You may like to develop a communications plan alongside your stakeholder management strategy or an individual plan for each stakeholder but however you do it, target individuals with specific messages, cultivate relationships and perhaps select friendly managers with high profile projects and ask to contribute to their projects.

Customer consultation

Surveys are a useful way of finding out usage trends and other data such as how satisfied your customers are with your service, staff, location, premises or whatever you choose to ask about. You can adopt quite sophisticated analysis techniques to combine factors and break down the responses by department or other meaningful demographics.

A survey is easily administered in-house and can be pre-printed and distributed in paper form with space for responses or sent out via email. You can also create web-based surveys and purchase software to analyse responses or easily outsource the whole operation including the design, data collection, analysis and report and conclusions. Successful surveys are quick to answer and don't exceed more than 4 pages of A4 at the very most. You need to explain what you are doing and give an indication of response time to encourage people to complete it and you might find it necessary to send out reminders or offer a prize draw.

Make the questions clear and avoid jargon. Closed questions are best where the answer is multiple choice or asks for a response to be rated on a scale of typically one to five. If you want people to avoid sitting on the fence at number three you can choose an even number and ask for responses on a scale of one to four. Open ended questions usually get skipped by respondents but you can include space for comments at the end. Anonymity might encourage more honest responses. Test the survey against a few people for clarity. Structured questions make it easier to transfer the

responses to something like Excel to tabulate and analyse the results.

To demonstrate your value be sure to publish the results soon after in summary form and outline what they actually mean. This is your opportunity to explain things, show off what you have done (especially if you are showing a comparative improvement on a previous survey) and get support for what you would like to do in response to issues.

Focus groups are useful to home in on specific issues. In a focus group, you bring together from six to nine users to discuss issues and concerns about the features of a service or product perhaps. The group typically lasts about two hours and is run by a moderator who maintains the group's focus.

Committees can serve several purposes. You can have an advisory board to give you the opportunity to learn how your users view the services and flag up any problems. You can test new ideas against an advisory board and use these people as champions and business change managers when you implement new services. You can hear from them what is happening in the business areas and develop your services accordingly. Such champions can cascade information they gain through the committee into their business areas and pass information back to you. Chosen well these people will be strong allies who will present a united front in fighting your corner with senior management. You should choose active users of the information service and may wish to have all sectors and levels of staff involved but the inclusion of quite senior people will be useful to you. You may wish to have an advisory body with good representation and a more senior strategy group who can be more available to you, perhaps monthly, and actually make decisions on behalf of senior management.

Conclusion

Information is now recognised as a key corporate resource and yet information centres are still being downsized and closed. CEOs **do** see information as valuable but continually perceive libraries as not. We may have changed our job titles to Information Managers or Chief Knowledge Officers and developed a whole host of new competencies but sometimes our roles are perceived to remain focussed on resourcing and managing a physical collection. The information that adds value to an organisation is rarely acquired from books so we need to let go of our traditional baseline and become part of the real workings of our organisation – what people do, how they work and what they need to do their jobs better. We need to be organisationally aligned and client focussed. We need to think organisation rather than information centre and see the big picture; to be busy with only the things that add value. If the client doesn't perceive value there is none, so stop doing whatever it is you are doing. We need to market ourselves, not the library, and take steps to stop being seen as the keeper of

a collection. Possibly most of all we need to listen to what our clients want and be active members of the organisation.

None of the tools I have discussed, in isolation, will secure your long lasting future. You should use a combination or choose the most appropriate one for the situation. And of course they cannot take the place of

having a solid marketing and communications plan, a clear understanding of your organisation's goals, departmental objectives which are strongly aligned to these goals and a consistently excellent service well informed by customer insight. You can measure and illustrate as much as you like but it is a hollow activity unless effective communication with decision makers is taking place.

Further reading

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Biography

Susan Mansfield has a BA (Hons) in Business Studies, from whence came her fervour for SWOT analyses and activity based costing models, and an MSc in Information Studies. She has worked in public, professional practice, in-house and central government information departments during her career. In her current post she is the Programme Manager of a document and records management change programme for Scottish Enterprise so she gets to amend Gantt charts to her heart's content.