

Yes We Can!

Communicating library value to a parent body

Majella Pugh

Associate Director

Collections and Information Resources Service

The University of Queensland (UQ) Library

Australia

Presentation overview

UQ

Why

Concepts & frameworks

How

Final thoughts

The University of Queensland

- Founded in **1909**
- 56,000 courses
- 370 programs
- 4 campuses
- 6 faculties
 - covering all disciplines
- 8 institutes
- Ranked in **top 100** internationally; & **top 3** in Australia
- 2013: **48,716 students** (11,475 international)
- Most overseas students from: China, Singapore, Malaysia
- **7,000 staff**



The University of Queensland Library

- **Largest** library in Queensland
- **15 branches**, including new off-site warehouse
- One of the largest libraries in Australia
- **E-preferred** policy since 2010
- **1,000+** online databases
- **30,000+** multimedia items
- **1.2 million ebooks**

- Over **2 million print volumes** (journals and monographs)
- Extensive manuscript, microform and pictorial collections
- Is **digitising** unique collections (inc. UQ theses)



Why UQL is investigating value

IMPETUS

- Planning days, late 2012
 - No usual % **budget** increase
 - **Ubiquity of Google** (a “non scholarly tool”)
- Digital disruption – focus on **spaces**
- No longer rely on being the **University’s ‘heart’**

- A slippery slope?
- How to prove value? Via current statistics?

Why UQL is investigating value

GOALS

- Be more **strategic**
- Prevent future **budgetary erosion** in an increasingly competitive UQ environment
- Exploit Library's **Point of Difference** (to Google)
- Determine if **statistics collected** could prove value
- **Empower** Library staff
- Communicate Library value in the language of the UQ Executive



Be true to the principles of a
GUARDIAN



But think and speak like a
MERCHANT

Thanks to: Sue McKerracher, CEO, ALIA

Concepts & frameworks

Concepts & frameworks

Overview

UQ BUSINESS SCHOOL COURSE: *Strategy in Action*

Integration logic

Execution logic

CUSTOMER-CENTERED

Generic value disciplines

Customer value proposition

Strategic conversations loop



Concepts & frameworks

GENERIC VALUE DISCIPLINES

Leading Edge

- **Product or service leadership** (*e.g. Apple*)

Low Total Cost

- **Operational excellence** via economies of scale in the supply chain (*e.g. Bunnings*)

★ Customer Support

- **Customer intimacy** via relationship building and tailored services (*e.g. UQ Library*)

Concepts & frameworks

CUSTOMER VALUE PROPOSITION

A clear customer need

Who

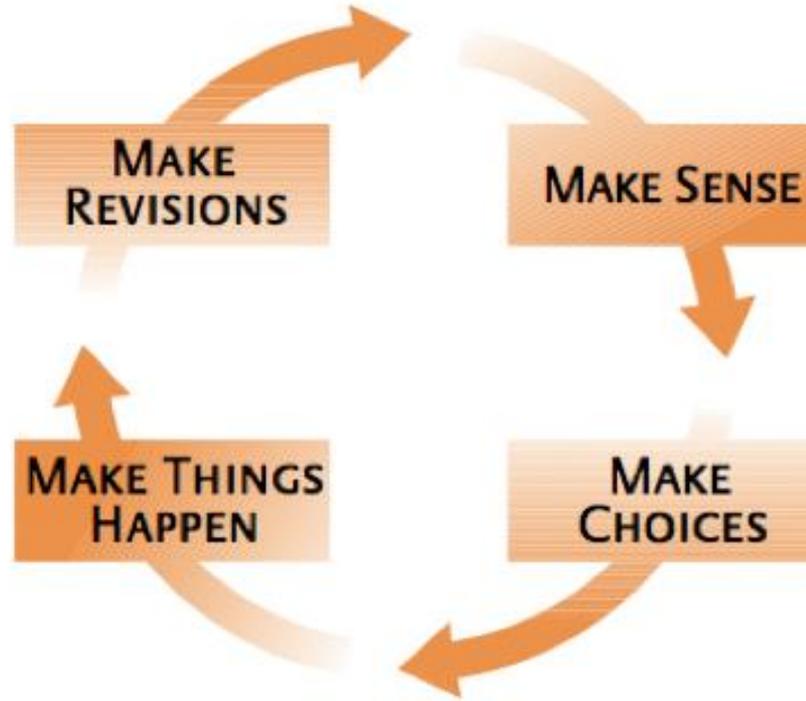
What

How



Concepts & frameworks

STRATEGIC CONVERSATIONS LOOP



1. Sensemaking

- *external*
- *internal*

Sensemaking (external)



Sensemaking (external)

Outcomes-Based
Real-Customer-Need
Strategic-Collaboration
Transcendent/Societal
Enabling
Innovation-Driver
Point-Of-Difference
Customer-Engagement
Customer
Outward-Facing
Meaningful-Measures
What-Do-You-Value
Positive-Consequences
Impact-on-Lives
External-Customers
Benefit-To-Receiver
Utility
Value

Sensemaking (external)



Sensemaking (external)

Value-Assessment-In-Infancy
Constantly-Evolving-Needs

Challenges

Building-Trust-and-Credibility
Iterative Time-Consuming
Difficult-To-Quantify Meaningful-Impact-Measures
Slow Long-Term-Tracking Intangible
Cultural/Socioeconomic-Background
Previous-and-Other-Influences
Direct-Proof-Hard-To-Establish User-Group-Variations
Privacy

Sensemaking (external)



A word cloud of various benefits and outcomes. The words are arranged in a roughly circular shape, with 'Benefits' being the largest and most central word. Other prominent words include 'Improved-User-Experience', 'Fluency-In-The-Language-Of-Merchants', and 'Future-Proofing'. Smaller words include 'Partner/Build-Networks', 'Identify-The-Undervalued', 'Library-Staff-Development', 'Promotion', 'Budget-Stability-Or-Improvement', 'Advocacy', 'Raise-Staff-Pride', 'Challenge-Misconceptions', 'Increased-Awareness', 'Support-For-Initiatives', 'Increase-External-Engagement', 'Focus-On-Value-Enablement', 'Marketing', 'Visibility', and 'Open-up-Dialogue'.

Partner/Build-Networks
Identify-The-Undervalued
Library-Staff-Development
Promotion
Budget-Stability-Or-Improvement
Fluency-In-The-Language-Of-Merchants
Improved-User-Experience
Challenge-Misconceptions
Increased-Awareness
Advocacy
Raise-Staff-Pride
Future-Proofing
Support-For-Initiatives
Increase-External-Engagement
Focus-On-Value-Enablement
Marketing
Benefits
Visibility
Open-up-Dialogue

Sensemaking (internal)



Sensemaking (internal)

1. UQL QUALITY & ASSESSMENT ADVISORY GROUP (QuAAG)

Quantitative data audit (hard) (*volume*)

- Statistics collected
- Tools

Qualitative data audit (soft) (feedback, surveys) (*quality*)

- Regular UQ or UQL surveys
- 2014 Ithaka survey responses
- Reviewed *Genie Wishes* from 2013 strategic planning process

Sensemaking (internal)

2. UQL PROJECT BOARD

Used **literature review** & **UQBS frameworks**:

- Identify **UQL value enablers**
- **Map** UQL value enablers to **UQ KPIs** for 2014-2017

Discussed findings re: **suitability** for value communication, with QuAAG

Sensemaking (internal)

Findings

UQL QuAAG: DATA AUDIT

- **200+** sets of figures collected monthly
- **12 tools** (serious flaws in 2)
- UQ Library staff – **unclear** on use/ why collected
- Patchy collection following 2010 realignment
- **Internal** workflows, and **external** reporting
- **Some** could demonstrate value enabling by UQL
- **10+ surveys**



Sensemaking (internal)

Findings

UQL PROJECT BOARD: VALUE AUDIT

- Identified **9 customer groups**
- Itemised **71 ways** UQL enabled value to customers
- Determined UQL's **Customer Value Proposition (CVP)**
- Confirmed that UQL's CVP supports **UQ's Mission and Vision**

Mapped results to **30 draft UQ KPIs**

Sensemaking (internal)

Findings

9 CUSTOMER GROUPS

- UQ Executive and other senior staff
- Researchers and higher degree students
- Teaching academics
- Undergraduate students
- Alumni
- Hospital staff
- Community
- Cyberschool

Plus: 'all customers'

Sensemaking (internal)

Findings

CUSTOMER GROUPS MAPPED TO UQL VALUE ENABLERS

Customer or Sub-group (Who)		Value Library Delivers/ Enables (What)	Delivers/ Enables (How)	Quantitative Measures	Qualitative Measures	Partners
0. All (generic)						
	0.1	Offers access to the largest academic collection of resources in Queensland	Collections, including Fryer Library's; Document Delivery; patron recommendations (orders); ebook PDA; streaming media; offairs; eSpace; Summon; classic catalogue; MyLibrary; LTS developer enhancements	Bibliographies from UQ publications and student papers; usage statistics	Interview; survey; pre & post intervention assessment; observation	Customers; non-customers
	0.2	Teaches information literacy (enabling effective operation in an e-environment)	Training in advanced searching; production of bibliographies (EndNote, Refworks etc); Library 101	Bibliographies from UQ publications and student papers; usage statistics	Interview; survey; pre & post intervention assessment; observation	Customers; non-customers
	0.3	Delivers right information, at right time	Collections, including Fryer Library's; Document Delivery; patron recommendations (orders); ebook PDA; streaming media; offairs; eSpace; Summon; classic catalogue; MyLibrary; LTS developer enhancements	Bibliographies from UQ publications and student papers; COUNTER, Circulation and other usage statistics	Interview; survey; pre & post intervention assessment; observation	Customers; non-customers

Sensemaking (internal)

Findings

UQL's CUSTOMER VALUE PROPOSITION

Who, What, How

UQ Library enables value through the provision of:

Quality collections, spaces, and tailored services that meet UQ's information needs in order to execute its **vision** of *knowledge leadership for a better world*

and contributes to UQ's mission:

'The University of Queensland positively influences society by engaging in the pursuit of excellence through the *creation, preservation, transfer and application of knowledge...*'

Sensemaking (internal)

Findings

UQL VALUE ENABLERS MAPPED TO UQ KPIS

UQ's 2014–18 STRATEGIC KPIS – mapped to UQ Library's VALUE DELIVERY

Section	UQ STRATEGIC KPI	UQ QUANTATATIVE TARGET BY 2018	LIBRARY VALUE AUDIT	VALUE ENABLERS OFFERED BY LIBRARY	UQ OR LIBRARY QUALITATIVE MEASURES	LIBRARY QUANTATATIVE PROXY MEASURES (Inferred value)	HOW MEASURES DEMONSTRATE LIBRARY VALUE	General Notes	
LEARNING	1	Percentage of QTAC first preferences with an OP 1-5 (or equivalent) (domestic undergraduate)	45% from: 27.5% (S1 2013)	Key: 4.1, 1.6, 1.10 Additional: 0.1 to 0.12 1.2, 1.3, 1.7, 1.8 3.5, 3.6 4.2 to 4.11 8.1 to 8.5	<ul style="list-style-type: none"> • Collections (p&e; heritage; offairs/ MM; PDA) • spaces (individual, group study, relaxation, LCR, networking with peers, 'third place', secure 24 hour, assistive technology rooms; device charging) • personalised, staffed services (queries, chat, 1-on-1, embedded teaching/ classes/ presentations, current awareness, AskIT; referencing support) • self service options (computers, room bookings, auto-loans, BDMs, printing, scanning, renewals; document delivery and Scan and Deliver services; purchase recommendations) • online Learning Resources • digital literacy • MyLibrary & website • Summon, classic catalogue • enhanced IT services and products developed by LTS 	<p>UQ applicant survey? – Library question?</p> <p>Engagement with Library social media</p> <p>Feedback to Library (e.g. via online Patron Suggestions/ Feedback, to Library staff)</p> <p>Once enroled:</p> <p>UQ Student Experience survey – Library question?</p> <p>And</p> <p>Library patron satisfaction survey</p>	<p>No. of Cyberschool members applying to UQ with an OP 1-5 (or equivalent) as first preference</p> <p>Once enrolled:</p> <p>Recorded Library activity (see KPI 7)</p>	<p>Library is nominated as forming part of applicant's motivation to select UQ. Is therefore integral to the UQ Advantage</p> <p>Positive Cyberschool membership experience encouraged students to apply to UQ</p> <p>Activity indicates Library services/ resources benefit (provide value) to patrons. Can be tracked as an annual trend and against Go8 libraries</p>	<p><i>Library Value Audit legend (71 points of value offered)</i></p> <p><i>Customer group:</i></p> <ol style="list-style-type: none"> 0. All 1. UQ Executive 2. Researchers and RHDs 3. Teaching academics 4. UG students 5. Alumni 6. Hospital 7. Community 8. Cyberschool <p>*****</p> <p>30 UQ Strategic KPIS, mapped to 71 points of value offered by UQ Library</p>
	2	Percentage of enrolments with an OP 1-5 (or equivalent) (domestic undergraduate)	45%	As for KPI 1	As for KPI 1	As for KPI 1	No. of Cyberschool members enrolling at UQ with OP 1-5 (or equivalent)	As for KPI 1	

2. Choosing

Choosing

16 UQ KPIs SELECTED

Summary: 16 UQ KPIs where UQ Library enables value

KPI listed UQ/ UQL mapping document	UQ KPI	UQ qualitative measure	UQ quantitative measure	How measures demonstrate the enablement of value	Notes
Learning					
1.	Percentage of <u>QTAC first preferences</u> with an <u>OP 1-5</u> (or equivalent) (domestic undergraduate)	-	Potential: <u>Cyberschool</u> evidence	Familiarity with the Library/ positive experiences form part of applicant's motivation to select UQ	<ul style="list-style-type: none"> • TZ reported that there is potential to map students' to Ops. Eg. -<u>RightNow</u> CRM (Client Relationship Management) tool -a question on commencing/incoming student survey -Library survey via My Library, at the start of the year -<u>mapping</u> high engagement schools, and investigating further -<u>data</u> from programs such as Young Achievers
2.	Percentage of <u>enrolments</u> with an <u>OP 1-5</u> (or equivalent) (domestic undergraduate)	-	As above	As above	As above
3.	Percentage of <u>QTAC first preferences</u> (domestic undergraduate)	-	As above	As above	As above Plus: LPPG suggested schools could survey once students place QTAC preferences in September
4.	Percentage of <u>enrolments</u> (domestic undergraduate)	Potential: - <u>focus group</u> or sample interviews with schools (<u>Cyberschool</u> open day is a possible time)	As above	As above	As for 1

Choosing

STATISTICS – LIBSTATS TABLES



<u>LibStats</u> Table Group	Currency	Activity	UQL Use	UQL Stakeholders	External Reporting	Demonstrates UQL Value - Link to 2014-2017 UQ KPIs	<u>QuAAG</u> Recommendation on <u>Remaining Measures & Comments</u> <i>(Must collect/ Keep collecting/ Stop collecting/ Expand)</i>
1	Some	Print circulation	ROI (cost per use); % of collection used (ever or in current year); Spot checks; Trends	IAS CMG LPPG CAG Managers	CAUL annual statistics (total)	Learning: International students - <i>use</i> Engagement: Alumni - <i>use</i>	Must collect some (see pp.3-8)
2	Some	Document Delivery	Budget and staff allocations; Trends	DDAG Managers	CAUL annual statistics (total)	Learning: International students; and UQ students overseas - <i>use</i> Engagement: Alumni - <i>use</i>	Must collect
3	Some <i><u>Eventum</u> also used</i>	Enquiries and Turnstile	Space; Services; Trends	Managers	CAUL annual statistics (total)	Learning: International students Engagement: Alumni??	Must collect Turnstile data collection equipment must be improved

3. Doing

Doing

PROJECT OUTPUTS SO FAR

- Created statistics' **tools portal** on Library wiki
 - Lists, describes and links to tools
 - Notes strategic use (to promote staff understanding)
- **Rebuilt** 2 faulty collection tools
- **Partnered:** added value questions to UQ surveys (2 areas)
- Identified **gaps** in statistics collecting – emerging areas (digitisation, IR)
- **Communicated** early findings to UQL staff and UQ Executive
- Evaluated new **dashboards/** tools to visualise and communicate UQL value enabling
- Piloted **value question** in 2 faculties
- Continued to **collect statistics**

Doing

STATISTICS PORTAL - TOOLS (WIKI)

Quantitative sources

Tool	Description	Business owner	UQL stakeholders	Strategic UQL use	External reporting (outside UQL)
Aurion	Feeds into <i>UQ Business Objects</i>	UQ HR	All Library staff	Staff management	UQ
Annual Report	Library yearly snapshot/ report on activities	@Mary Lyons	Managers	Planning; Trends	No longer applicable
Branch statistics	Folders on LibShare for each branch. Includes folder for BRAN stats (<i>Excel spreadsheets used to collect statistics across the Library prior to 2006, before LibStats was implemented</i>)	n/a	n/a	n/a	n/a
Business Objects/ UQ Reportal	Repository for finance, staff/ academics, students	UQ Finance	Managers	Financial management; Planning services to assist students and researchers	UQ
CAUL institutional statistics	Australian university library members input selected annual data (e.g. on collections)	CAUL (UQ contact: @Mary Lyons)	Managers	Benchmarking	CAUL

Doing

PILOT: VALUE/IMPACT QUESTION

What value does UQ Library provide to you? – sample responses:

An invaluable service to the school is assisting with the **Electronic Course Profiles** each semester and organising the reference material. Both staff and students really appreciate this, since we now have **links** and updated issues for all references, **making them easy and convenient to find.**
(Professor, Veterinary Science)

The **literature search service** encourages clinicians to **incorporate evidence into their daily practice by simplifying the process** of engaging with library search systems *(Clinical Educator, Social Worker)*

This support has not only enabled busy therapists to **gain timely access to evidence**, it has also **increased their confidence** in searching databases to obtain high quality research. *(EBP Coordinator, Occupational Therapy)*

Issues for librarians: Fear of leading the witness (bias); F2F discomfort

Doing

IN PROGRESS/ NEXT STEPS

- End project & **operationalise**: understanding and communication of value becomes everyday work
- Develop a comprehensive ongoing **communication strategy** (UQL, UQ)
- Decide on an infographical performance **summary or dashboard**
 - Confluence wiki
 - JISC's RAPTOR
 - Springshare's LibAnalytics Insight
 - PQ Intota Assessment
 - EzParse or Kibana Elasticsearch
 - Google Analytics
- Address **gaps** identified in potential value enablement (*surveys*)
- Create **baseline** of statistics at end of 2014
- Focused research by two librarians with statistics Masters – **personal indirect value-in-use study?**

4. Revising

Final thoughts

- Dry & **time consuming**, but rewarding
- **All libraries must focus on value** in this Time of The Merchants
- Have a **person dedicated to value work** – time in between regular work hard to find: very focused
- Involve and support library **colleagues**
 - They collect the statistics
 - Need to understand why
 - Need to weave value enablement into daily consciousness, and feel confident
- Invest most time in **Sensemaking phase**, before ‘Doing’
 - What do you hope to **demonstrate/ achieve?**
- Use a **framework**
- **Partner** outside library
- Use **success stories** in 1 area to promote activities in other areas



Be true to the principles of a
GUARDIAN



But think and speak like a
MERCHANT

Thanks to: Sue McKerracher, CEO, ALIA

Key readings

ARL Library Assessment Conference

Creaser, C. & Spezi, V.

ISO/DIS 16439:2014

Jantti, M. (University of Wollongong) – *Value Cube, Marketing Cube*

Marshall, H.

Matthews, J.

Northumbria International Conference on Performance Measurement

Oakleaf, M.

Poll, R.

Tenopir, C. - *LibValue project*

Town, J. S.

Two appendices in paper (bibliography & economic studies)

m.pugh@library.uq.edu.au