YES WE CAN! COMMUNICATING LIBRARY VALUE TO A PARENT BODY

CONTENT STREAM:
Academic - Communicating Value

ABSTRACT

INTRODUCTION
The presentation describes The University of Queensland (UQ) Library's journey towards systematically measuring and communicating its value to its parent body. Work began with the re-establishment of the Library Quality and Assessment Advisory Group (QuAAG) early in 2013.

METHODS
QuAAG referenced business logic theory, including the Strategic Conversations Loop of sensemaking, choosing, doing and revising. For *sensemaking*, QuAAG initiated a project that first audited and assessed the usefulness of statistics gathered by Library staff. It sorted these into essentials for informing internal management (on the volume and quality of activity), figures required for external reporting (e.g. to CAUL), and data demonstrating value delivered as a benefit to the receiver.

Simultaneously, the project manager undertook a literature review on communicating library value, and from this knowledge base devised a table around UQ Library's customer groups. Seventy-one points of value were identified then mapped to UQ's 2014-2017 Strategic Plan.

From these, QuAAG *chose* 16 measures that demonstrated the Library's delivery of value. To provide context to the measures, librarians piloted the collection of additional qualitative data during consultations with customers. A simple question was asked, "What value does the Library provide *to you*?"

Finally, Library staff was informed, and collection systems were put in place. Data supporting selected measures will be collected throughout 2014 (*doing*), and will be *revised* towards the end of 2014 by QuAAG.

To communicate the Library's value, the University Librarian will present quarterly findings to the Deputy Vice Chancellor (Academic). These will also be added to the Library's website, for Library staff awareness and for communication to Library patrons.

RESULTS
It is anticipated that results could include: a positive influence on the size of 2015 funding to the Library; the Library featuring more prominently in UQ marketing campaigns; a greater awareness and appreciation of value delivered by the Library amongst Library staff, customers and the UQ Executive; and an increase in alumni and Friends of the Library memberships.

CONCLUSIONS
Employing business logic theory provides UQ Library with a framework with which to evaluate and document the value it delivers to its customers. This enables the Library to effectively communicate its value to its parent body. In the short term, activities reinforce staff morale, and in the long term, should help future-proof the Library service. It is work that the literature recommends all libraries undertake.

RELEVANCE
Reflection upon value delivered by libraries is essential in cash-strapped times. The ubiquity of Google as our chief competitor signals that we must think strategically, and converse in the business language used by our parent body. Our greatest value lies in libraries excelling in the Customer Support Value Discipline. This creates value through Customer Intimacy, i.e. via relationship building and tailored service provision. By focusing outward-looking measures on the value delivered to customers, libraries can communicate in concrete terms the positive impact we have on our customers and on parental outcomes, which culminates in transcendent societal value delivered over generations.

PAPER

SUMMARY

This paper serves as background to the conference presentation. It outlines the theories behind The University of Queensland (UQ) Library's project to communicate its value to its parent body, as well as key themes from the reviewed literature. This material will only be touched on at the presentation, where the focus will be instead on the project's inputs, processes and outcomes.

The paper is divided into five parts: an account of the project background; a discussion of the customer-centred Business Logic Theory; notes on the measurement of library value; and a short description of the project. It ends with a summary of the questions to be answered in the presentation. The paper includes two appendices.

PROJECT BACKGROUND

Late 2012, UQ Library undertook two days of operational planning for the coming year. As a key stakeholder, the Senior Deputy Vice Chancellor was invited to speak. He foreshadowed a percentage cut to all UQ budgets in 2013, as a result of the recent change in state government. By the end of the planning session, attendees agreed it was critical that the Library be able to demonstrate its value to our parent body (the UQ Executive).

It was a wake-up call for many. In these cash-strapped times, it was realised that we could no longer rely on the notion of a library as 'the heart of the university' (Oakleaf, 2010) to provide a protective mantle. Concern was also evident over the rising use and acceptance of non-scholarly tools such as Google, which could render a library into invisibility (Town, 2011). But how could UQ Library demonstrate and communicate its point of difference?

A key outcome from the planning session was the reformation of UQ Library's Quality and Assessment Advisory Group (QuAAG). It began monthly meetings early in 2013. Its first order of business was 1) to instigate a project to measure and communicate UQ Library value, and 2) to audit and assess the usefulness of statistics currently gathered by UQ Library staff. The project was estimated to take at least two years, and would result in a significant culture shift for library staff.

As manager of the library value project, I began by conducting an extensive literature review. To frame the project's processes, I used Business Logic Theory, including the Strategic Conversations Loop of *Sensemaking, Choosing, Doing and Revising*. I had recently learnt the theory in a week-long UQ Business School (UQBS) course

(University of Queensland, 2013), and saw it as a powerful framework within which to evaluate and document the Library's value-enablers. More importantly, I agreed with Jantti (2014) that it is critical for a library to speak the same business language as its organisational executive body. Hence, 'patrons' are called 'customers' throughout the paper, as supported by Matthews (2013).

BUSINESS LOGIC THEORY

The relevance of business logic theory

Traditional ways of collecting data measure the volume of activity and the quality of performance which guide internal workflow and staffing decisions. These measure input, process, output and outcomes (Matthews, 2013) – *what gets measured, gets managed* (Jantti, 2013).

New ways of collecting data must broaden to measure the value (*the utility or benefit*) of the library from the perspective of *external* customers (individuals, and organisational units) (Matthews, 2013). Value can be measured through the *impact* (change or difference) the library makes to the life of its customers. It requires a new *outward* facing mind-set (Jantti, 2013), focusing on *strategic collaboration*. Libraries must engage with customers, to not only know and anticipate their needs, but to also ask them what *they* value (Town, 2011). Done well, it drives change and innovation, and provides benefit to the institution. In keeping with this, the first priority listed in UQ Library's 2013-2017 strategic plan is to focus on the user experience.

Without linking to customer and stakeholder values, measures will lack force or meaning (Town & Kyrillidou, 2013). Thus, to be strategic, measurement of UQ Library's positive impact on its customers must be *outcomes* based, linked to UQ Executive's Key Performance Indicators (KPIs). These are built around UQ's three pillars of Learning, Discovery, and Engagement, plus Enablers. Chosen measures will demonstrate the Library's key value to UQ: supporting its vision of *'knowledge leadership for a better world'*, and its mission, which begins *'The University of Queensland positively influences society by engaging in the pursuit of excellence through the creation, preservation, transfer and application of knowledge'*.

In short, UQ Library must demonstrate and communicate that its role in UQ's data-information-knowledge-wisdom pyramid is critical to the success of UQ's vision and mission (University of Queensland, 2013; Marshall, 2012; Town, 2011; Jantti, 2013).

Business logic theory and customer value

In business logic terms, what value does a library offer? To answer this, we must first establish what our customers value, prove we are providing it to them, then show that it benefits the organisation. The UQBS course taught that organisations (for profit and not for profit) must have a business model with a customer value proposition (CVP) (i.e. a clear customer need) at its core, or it will fail. Two models were taught: Integration Logic, and Execution Logic.

In order to establish the CVP, we must ask:

- **who** is the customer
- **what** is the job they want done, and
- **how** will we meet their need.

There are three generic Value Disciplines based on the CVP:

- *Leading Edge* (via Product or Services Leadership)
- *Low Total Cost* (via Operational Excellence, created by economies of scale in the supply chain), and
- *Customer Support* (via Customer Intimacy, created by relationship building and tailored services).

An organisation must focus on one of the three Value Disciplines in their business model. Once established, meaningful measurement of value can occur. The other two areas are deemed 'Fit for Purpose', and enable the dominant Value Discipline. Focus on more than one Value Discipline will create a 'Zone of Mediocrity', and the business model will ultimately fail. Fit for Purpose activities are best measured for benchmarking. The UQBS course depicted best practice as a potential trap reinforcing mediocrity, as it sets a minimum standard.

An organisation will never make all of its customers happy. It cannot do all things for all people. Thus, choices have to be made to maximise customer value, and to protect against employee burnout and resource depletion.

In my assessment, UQ Library excels in the *Customer Support* Value Discipline, underscored by a strong customer-focused culture amongst Library staff, and relationship building. UQ Executive is strategically focused on the *Leading Edge* Value Discipline, as evidenced by 'The UQ Advantage' campaign. This is borne out by the Vice Chancellor's remarks to the 2013 external UQ Library Review panel, that he wishes the Library to show leadership and take risks.

In this environment, UQ Library will struggle to demonstrate value using the *Low Total Cost* (Operational Excellence) Value Discipline, as it operates a free service. Minimising operating costs risks decimating our *Customer Support* excellence (revenue and costs being the two key economic levers). It will not demonstrate value using the *Leading Edge* Value Discipline, as it does not focus on creating game-changing products or services.

In summary, UQ Library's best opportunity is to demonstrate how *Customer Support* (via *Customer Intimacy*, created by relationship building and tailored service) creates value for the UQ Executive, which has a strategic focus on the *Leading Edge* Value Discipline.

Unmet customer needs

Business logic theory also helps identify areas of unmet customer need (value gaps), and point to strategic innovation opportunities suitable for development into projects. The Execution Logic framework of *Arenas, Vehicles, Differentiation, Economic Logic, and Staging* (over horizon periods 1 to 3); and the Integration Logic framework of *Customer Value, Capabilities and Resources, Organisation Value and Strategic Initiatives* ensure optimal project selection. For higher education, staging can be guided by the annual NMC/ EDUCAUSE Horizon Report, which is framed around horizon periods 1, 2 and 3 (1 year or less; 2-3 years; 4-5 years).

These methodologies are best used in conjunction with the repeating Strategic Conversations Loop. Varied customer input should be captured via scenario planning, pre-mortems, interviews and in particular, observation. Customers are less

likely to know what they want when asked out of context. Task/ activity observation addresses the gap and is a window into the user experience.

Business models must build-in flexibility for 'Black Swan' events - the 'unknown unknown' threats, such as the Global Financial Crisis of 2008. Awareness of the macro environment is critical, however, specific predictions should not build-in rigidity. Strategies should adapt, like jazz, not be fixed, like a symphony. Finally, libraries must beware the 'Marco Polo Syndrome', that is not jump on bandwagons without careful thought, just because they are there (as was China; as are MOOCs) (University of Queensland, 2013).

Methodology

The UQBS course suggests the following methodology:

1. Understand the library's existing business model
2. Determine what can be leveraged
3. Develop a roadmap
    1. Satisfy a real customer need (a job that needs to be done)
    2. Construct a blueprint outlining how the library will fulfil it
    3. Compare the existing business model to the blueprint, to identify what needs changing, keeping or developing
4. Identify barriers to getting the job done by the customer themselves (insufficient funds, access, skill or time), and step in.

'Four quadrant' frameworks like BCG's Boston Box (a matrix which plots against market growth and relative market share) can be used to identify library activities as one of four types viz a viz strategic importance. These are: opportunities for expansion (Questions); unique services (Stars); bread and butter services (Cash Cows); and areas or services no longer viable (Dogs).

Cox and Jantti (2012) recommend aiming for Blue Ocean markets (untapped spaces), not Red Ocean markets (e.g. the established information market space, dominated by Google). They point to where their university can add value: engagement, access, discovery and collection development. They cite Neal as recommending that academic libraries embrace the 'human objectives' of success, happiness, productivity, progress, relationships, experiences and impact.

MEASURING LIBRARY VALUE

Characteristics of value measurement

Since the commencement of UQ Library's value project, ISO/DIS 16439:2014 has been published. It should now be the starting point for such projects, as it defines and codifies a process that writers (before its arrival) described as 'difficult' (Koltay and Li, 2010), a 'real challenge' (Matthews, 2013), and 'no easy task' (Poll and Payne, 2006).

According to the literature review, there are three common ways to approach value using economic theory**,** as:

Value-in-use (favourable consequences, e.g. derived from reading or using a service/ information), *return on investment* (the ratio of the cost/ use efficiency of a library resource), and *value-in-exchange or purchase value* (what one is willing to pay for

the service or information in money and/or time). However, the latter approach is not helpful for most libraries, unless fees are charged. As such, it is not recommended by the literature review, and is not discussed here.

To determine the value of a library's impact on customers' lives, the value can be calculated as either an indirect measure, or a direct measure. Results can be considered from three broad impact perspectives: personal, organisational or financial (Matthews, 2013).

Personal perspective:

Personal indirect value-in-use measures include student retention rates, the number of Research Higher Degree completions, and results from surveys. A personal direct value-in-use measure can be the results from a standardised exam. Most library studies involve personal indirect use measures of students, but offer unclear results (Oakleaf in Matthews, 2013; Cox and Jantti, 2012).

Organisational perspective:

Matthews (2013) recommends partnering with internal units (e.g. university student services) to obtain broader perspectives on indirect value-in-use. Jantti (2014) speaks of joining existing corporate data silos together, leading to richer results. Here, surrogates (proxies) can be used to demonstrate implied value (e.g. student use of library resources), as finding direct proof is problematic in libraries (Poll and Payne, 2006; Poll, 2011; Oakeleaf, 2010; Jantti, 2013). Surrogates indicate the possibility of impact and imply value (Tenopir, 2014). Triangulation with other measures provides support for findings and assumptions. Surrogates are shown to be reliable over time (Jantti, 2014).

Financial perspective:

Value-in-use can be expressed in dollar figures through:

1) Indirect use benefits. This is the economic impact of tangible outcomes facilitated by the library and its services, though they are 'impractical to calculate' (Matthews, 2013) - via:

- Contingent valuation (as used by the British Library in 2003 (Poll & Payne, 2006)):
  o *willingness to accept* – the sum customers are prepared to accept as compensation, if the service were given up; or
  o *willingness to pay* - the price that customers would pay to keep a service, if the service were slated to be removed.
- Triple bottom line framework - the financial, cultural, and environmental contribution to a community
- Social impact audit – which gives a social return on investment (SROI).

2) Direct use benefits (or tangible benefits), where direct measurement is possible - via:

- comparison of the cost of library services to the price of similar, non-library services

- calculation of the dollar value of the time saved by the library using an average salary for the customer.

3) Non use benefit, which is derived from possible future use, or prestige value from the library's mere existence.

Matthews (2013) posits that all three should be added together to derive the financial value perspective.

Financial valuations are not recommended as a sole measure by the literature review (e.g. Tenopir, 2014). They are more convincing when used in conjunction with social impacts (Poll, 2011; Town, 2011). Economic value tools may only reflect instrumental aspects of library activities, and will therefore have a short-term focus - intangible benefits must be built in. Town (2011) found that economic tools were not particularly relevant to proofs of value at the University of York Library, though students wanted 'value for money'.

Tenopir (2011, 2013) in the LibValue project, recommends measuring personal indirect value-in-use. She has linked the value derived by academics from reading journal articles obtained from the library (including UQ's), to personal success and faculty productivity.

A flavour of the challenges for libraries wishing to demonstrate value

Challenges highlighted by the literature review frequently cite privacy and the difficulty in establishing meaningful impact measures when attempting to demonstrate and communicate value (Koltay and Li, 2010). Poll, who had significant input into the new standard ISO/DIS 16439:2014, notes that customer perceptions/ attitudes towards libraries are influenced by previous experiences, as well as their cultural/ socioeconomic backgrounds (Poll, 2011). She also writes that a service can have different value and impact for different user groups, and that long-term effects cannot be assessed if customers are no longer contactable (Poll, 2011).

Writing with Payne, the authors warn that all methods are time-consuming, and that environments and needs are constantly evolving (Poll and Payne, 2006). They caution that the impact of library services is for the most part intangible and difficult to quantify, and that influences on an individual are manifold (e.g. friends, colleagues, media, teachers). The latter makes it difficult to trace changes and improvements back to the library.

The ARL's SPEC kit 318 (Koltay and Li, 2010) stated 'we cannot help but admit that the glass of library impact investigations is almost empty... impact assessment is a field in its infancy for research libraries'. The publication of ISO/DIS 16439:2014 presents a major step forward.

A flavour of the benefits for libraries wishing to demonstrate value

The literature review elicited numerous benefits for libraries that do embark on the path of demonstrating and communicating value, based on its impact on customers. For example, Poll and Payne underscore an increase in the perceived value of the library, leading to a deeper understanding of how the library supports academic processes (an advocacy benefit) (Poll and Payne, 2006). They note other benefits as improving dialogue with stakeholders, building networks, challenging misconceptions

(held within the library and by stakeholders), and professionally developing library staff.

A key paper written by Creaser and Spezi speaks of raising the library profile/ visibility (a promotion benefit), providing evidence of support for initiatives, and identifying what is not valued. This enables decisions around which library services can be stopped to free-up time to accommodate time-consuming tailored services (Creaser and Spezi, 2012).

The UQBS course adduces future-proofing the unit's (library's) position in the eyes of the organisational parent as a key benefit. By keeping the customer at the centre of core business and checking their valuation of service/ products, there results an improved user experience. Contemporaneously, this reinforces staff morale during a global or organisational paradigm shift such as a financial contraction (University of Queensland, 2013).

Observations on measuring library value

Most of the literature reviewed describes studies conducted on students. It has only recently started looking at impact on researchers (Crease and Spezi, 2012).

Themes from these readings can be grouped around impact, measures, data and customers. *Impact* can be specific or generic (direct or indirect), with the customer using the library for task, personal or activity reasons (Matthews, 2013). Here, 'soft' evidence of impact can be objectively observed, or solicited from customers (the latter providing subjective opinions/ anecdotal evidence) (Poll, 2011). Poll states that user satisfaction does not measure impact. Rather, it is a qualitative assessment of library outputs (Poll, 2011). Matthews (2013) underscores that LibQUAL+ is not designed to address the issue of what impacts the lives of students.

Impact *measures* can be implied (from usage statistics), explicit (testimonials), or derived (e.g. return on investment, or contingent valuation) (Tenopir, 2013). They can be direct (e.g. evaluation of bibliographies, observation of behaviour/ task execution) or indirect (e.g. collection of feedback via paper or online surveys) (Koltay and Li, 2010). Measures can be immediate, future or long-term; actual or potential, and their impact can be intended or unintended (Poll, 2011).

Data collected can be qualitative ('soft'), such as surveys (print, phone, online), interviews, focus/ discussion groups, observation, and user self-assessment of skills and competencies gained. They provide a rich source of 'stories' about personal experiences or judgements, which can be organised to recognise patterns and crucial points (Poll and Payne, 2006; Poll, 2011). Triangulation surveys will give an indication on how typical are the case study experiences (Nitecki and Abels, 2011).

Data collected can be quantitative ('hard'), for example before and after tests, the analysis of publications, usage data, logbooks, transaction logs, or longitudinal studies. Methods should try to measure *changes* in competencies or behaviour, or to find correlations between library use and a person's academic or professional success (Poll and Payne, 2006).

Customers should be actual and potential (Poll and Payne, 2006). Observed methodology can be structured or non-structured, with or without the customers' participation, open or covert. Solicited methods produce stories which are invaluable for the illustration and plausibility of dry results (Poll, 2011). Creating data-based

personas demonstrates value well - e.g. an associate professor in physics reads... or the most successful academic reads... (Tenopir, 2013 and 2014).

Two authors put forward key observations outside these four themes. Matthews notes that a library's intangible assets include human capital, information capital, and organisational capital (e.g. culture, leadership, alignment, teamwork). He goes on to caution that the library's collection represents potential value or potential positive consequences. It is not a value in its self - assets must be applied to generate a positive outcome (Matthews, 2013) (i.e. *a bell is no bell til you ring it*...). Town warns that transcendent value or higher-order benefits are the hardest to demonstrate in the short-term (Town, 2011 and 2013).

Tips from the literature

Once the Sensemaking phase has been completed in the Strategic Conversations Loop, decisions must be made around processes (*Choosing*) before measurements are collected. The literature review stressed only tracking measures of interest to the most senior person in the organisation (Taylor, 2011). There should be 15 to 25 measures at maximum (Marshall, 2012), which act as a report card, and/ or as a decision making tool (Taylor, 2011). Multiple methods, both qualitative and quantitative, should be employed (Tenopir, 2011 and 2013; Creaser and Spezi, 2012).

Decide first which values are to be demonstrated, then collect the data. It is critical that existing data is not forced into fitting a value (i.e. don't put the cart before the horse): the activity should drive the metric; the metric should not drive the activity (Marshall, 2012). Action research, closely linked to reflective practice, is recommended by LIRG/ SCONUL (Poll and Payne, 2006). Some authors suggest considering the use of a Balanced Scorecard, and/ or a values scorecard approach (Taylor, 2011; Town, 2011 and 2013).

Care should be taken to define value, outcomes, and return on investment before measurement commences (Tenopir, Fleming-May and Chrzastowski, 2011; Koltay and Li, 2010; Poll, 2011; Taylor, 2011). Robust processes should be developed to collect and use data (Oakleaf, 2010). Objectives should be clearly articulated - what is to be achieved (Poll and Payne, 2006), with success criteria/ KPIs developed to determine if objectives have been met (Poll, 2006). Answer what is it that the library enables customers to do - what does the library change (e.g. skill, competency, behaviour) (Poll and Payne, 2006). A formal measurement plan should be established (Oakleaf, 2010).

In the Doing phase of the Loop, all calculations should be recorded, so measures are repeated exactly over time (Taylor, 2011). Creaser and Spezi recommend using a wiki to record successful strategies, and to help identify patterns of success, recurrent questions and concerns. This also helps library staff be prepared and feel confident (Creaser and Spezi, 2012). Get a system to record standardised data, and record it systematically, consistently and uniformly. Value measurements should be an ongoing program, not a project (Creaser and Spezi, 2012)

Matthews, among others already cited (Jantti, 2014; Tenopir, 2014), recommends partnering with individuals and organisational units in order to determine value (remember, it is the customer who defines the value). Relationship-building is critical, which establishes trust and credibility. However, he warns it is a slow, iterative and time-consuming process (Matthews, 2013). Poll advocates using economic

measures as a secondary aspect of demonstrating library impact (seen as 'lower ranking' to social impacts) (Poll, 2011).

In articulating the value, UQBS taught linking value assessments to specific customer needs and tasks, using the customers' language (University of Queensland, 2013). Matthews recommends distinguishing between the value added by library staff, services and collections; versus space/ facilities (e.g. the 'library as 3rd place') (Matthews, 2013).

Supporting library staff during the process is critical. Oakleaf advises the provision of continuing professional development to staff on the measurement, demonstration and communication of value. This will help build their comfort, confidence and skills in the art of personalised service (including the correct timing of cold-calls) (Oakleaf, 2010). Others advise getting comfortable using and analysing confidential, but not anonymous, data (Koltay and Li, 2010). Managers must be prepared to promote and support the cultural change that this new way of thinking will bring to library staff. Staff buy-in is important. Note that the language used to communicate value will require agreement (Creaser and Spezi, 2012).

Finally, in leveraging the findings, use success stories in one area to promote similar services in other areas; engage multidimensionally - at all levels of the university (Creaser and Spezi, 2012).

UQ LIBRARY PROJECT

To recap: the Value Discipline in which UQ Library excels is *Customer Support*, via *Customer Intimacy*. This is created by relationship building and tailored services. Customer Intimacy is the hardest of the three Disciplines for competitors to imitate (e.g. Google).

With this in mind, QuAAG undertook a Sensemaking exercise late 2013, in which it identified nine customer groups, and 71 discrete points of indirect use value that UQ Library enables for its customers. It then matched these against the UQ Executive's 30 draft KPIs for 2014-2017. The resulting table detailed the *who, what and how* of the Library's Customer Value Proposition for its customers. The list was not deemed to be exhaustive, and is expected to change as UQ Library services respond to evolving customer needs.

The data mapped under each UQ KPI was discussed by QuAAG as to its suitability to realistically demonstrate Library value to the UQ Executive. Two-thirds of the KPIs were discarded as being 'too long a bow to draw' – e.g. *Percentage of academic staff at Professorial level who are women*. However, discussions brought to light opportunities to strengthen partnerships with non-Library services, such as UQ's Aboriginal and Torres Strait Islander Studies Unit. It also resulted in requests to insert Library value questions into existing UQ-wide surveys, such as that assessing 'The UQ Student Experience'.

As another key part of Sensemaking, QuAAG audited existing measurements collected by UQ Library. It discovered that close to 200 sets of figures were collected and recorded in at least a dozen tools. These ranged from bespoke software programs to Excel spreadsheets. Staff consulted during the process queried the purpose of some statistics. For a number, QuAAG found that the reasons for collection were no longer meaningful and recommended their abandonment.

Audit findings were sorted into three types: 'essential' statistics collected for informing internal management (on the volume and quality of activity), figures required for external reporting (e.g. to CAUL), and data able to demonstrate the value delivered as a benefit to the receiver. The audit resulted in improved communication about the statistics collected, as QuAAG created a staff portal that listed and linked out to the collection tools. The portal also noted how the measures assisted in the demonstration of value enabled by UQ Library.

These measures were then connected to 16 of the best-bet mapped UQ Executive KPIs. Surplus measures were deemed non-core, and were made optional for library staff to collect on a branch need basis only. Developer time to work on two existing in-house statistical tools was negotiated. This led to the suppression of out-dated collection tables, and the inclusion of fresh tables covering newer, value-enabling Library activities.

THE PRESENTATION

Key questions are being answered through this ongoing project, and these form the basis of the conference presentation. A sample of the questions are noted under the four stages of the Strategic Conversations Loop:

Sensemaking:

- Which is UQ Library's Customer Value Discipline of excellence?
- Who are UQ Library's customers/ for whom we are creating value?
- What customer value are we trying to create (i.e. our CVP, versus Google's – our chief competitor)?
- How does UQ Library deliver or enable this customer value?
- What can we learn from colleagues in other libraries about demonstrating and communicating value to parent bodies?

Choosing:

- Once value enablers are established, what should be systematically measured?
- Do we already collect these measures?
- What can we stop measuring?
- What should we start measuring?
- What must we keep measuring for internal management, or external purposes?

Doing:

- How will the UQ Library systematically communicate this value to its parent body, its staff and other stakeholders?
- Which measures will UQ Library choose to systematically communicate?
- Which partnerships should UQ Library strengthen to facilitate the measurement and communication of its value to its parent body?
- What benefits does UQ Library expect to derive from communicating value to its parent body?

Revising:

- When and how should QuAAG revise the measurements and the value

communication strategy it recommends?
- What will UQ Library do differently?

The answers shaped QuAAG's recommendations. These will be discussed in the presentation, which will also update where UQ Library is in terms of its Strategic Conversations Loop. The presentation will outline UQ Library's future plans, with respect to the ongoing communication of its value to the UQ Executive.

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  - This study found that patrons value collections, guidance on where to publish to maximise impact, and the library's gateway function as a research portal and access broker

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- Contingent value of not having access to library-provided articles = **US$1,200**
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King, D., Aerni, S., Brody, F., Herbison, M., & Kohberger, P. (2004). Comparative
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- Analysed time saved accessing information through the library. Academics
would have to spend an average of **17 mins and $2.10** to find the information
they needed, from other sources

Koltay, Z., & Li, X. (2010). *SPEC kit 318: Impact measures in research libraries*.
Washington, DC: Association of Research Libraries. Retrieved from
http://publications.arl.org/Impact-Measures-in-Research-Libraries-SPEC-Kit-
318/
- Further data available: http://publications.arl.org/Impact-Measures-in-
Research-Libraries-SPEC-Kit-318/60
- Case study: Cornell University's (CUL) Library Research and Assessment
Unit quantified their library's value as a financial return on investment. They
give a dollar figure for the cost of services should CUL not exist (replacement
costs), for:
  - the use of physical volumes
  - articles accessed online and through Doc Del
  - answering questions to build research skills and contribute to CUL's
research results
  - in-depth consultations contributing to CUL's research results
  - the use of preprints from arXiv.org
  - distribution of Cornell-created content to the world through eCommons
  - laptops lent.

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- Case study: The time spent by University of Nottingham librarians involved in systematic reviews was costed, and documented as part of the research proposal at a high level, to develop robust search strategies

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- Elsevier White Paper #1: ROI of library resources = **$4.38** in grant income for every dollar invested, in 2006. (Similar to the British Library's £4.40 in 2003)
- Phase 1 (see: Tenopir (2010) for Phase 2): University of Illinois at Urbana-Champaign served as a case study to develop a methodology for measuring how university investment in library e-collections was returned to the university in the grant process

National Network of Libraries of Medicine. (n.d.). *Cost benefit and ROI calculator*. Retrieved from http://nnlm.gov/mcr/evaluation/roi.html

Tenopir, C. (2010). University investment in the library, Phase II: An international study of the library's value to the grants process. White Paper #2. *Library Connect: Partnering with the library community*. Retrieved from http://libraryconnect.elsevier.com/sites/default/files/2010-06-whitepaper-roi2_0.pdf

- Elsevier White Paper #2: ROI of research universities in 8 countries in helping the research grants process to succeed: estimated to be just under **1:1** for humanities/ social sciences based institutions, and **over 15:1** for scientific research based institutions. Most comprehensive research and teaching universities had a library ROI in grants in the range of **3to5:1**
- Phase 2 (see: Luther (2008) for Phase 1): Tests the Phase 1 methodology in universities across the globe

Tenopir, C. (2013). Building evidence of the value and impact of library and information services: Methods, metrics and ROI. *Evidence based library and information practice*, *8*(2), 270. Retrieved from http://ejournals.library.ualberta.ca/index.php/EBLIP/article/view/19527

- University of Queensland: Around 65% of articles are from the library - gives exchange value of journal collection based on critical incident of last reading.
- University of Tennesee, Knoxville: PPTs showing dollar amounts for: faculty contingent valuation and ROI (**2.9:1**); use of library workstations for students (**38.4:1**) and faculty (**24.8:1**); use of reference services by students (**6.4:1**) and faculty (**17:1**)