

# PROVING YOUR LIBRARY'S **VALUE**

A TOOLKIT FOR TRANSPORTATION LIBRARIANS

# **PROVING YOUR LIBRARY'S VALUE**

**A Toolkit for Transportation Librarians**

**A.J. Million, Sheila M. Hatchell, and Roberto A. Sarmiento**

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# FOREWORD

In a time of constrained budgets, demonstrating added benefits, effectiveness, and contributions to an organization's strategic goals is critical for all programs, as well as for administrative and support functions. Ensuring that maximum value is derived for every dollar invested is a function of both cost and perceived benefit. In transportation libraries, we have the input, output, and return on investment (ROI) measures available to accurately illustrate how well we are performing in terms of cost. However, we need to provide context to the numbers: what have we truly impacted in the activity of our enterprise?

The task is complex for libraries and information centers, requiring detailed descriptions of how information provided to users is reflected in the final decision, action, report, research, or other activity. Was a new idea path followed? An approach confirmed? A new connection discovered? Time saved in discovering a solution? Some portion of costs avoided? Communicating value is one approach to completing this task. It requires more effort than collecting metrics within our control, and closer partnerships with the work of our users. When funding decisions are being made, telling effective value stories is paramount.

The Transportation Research Board's *Transportation Knowledge Networks: An Information Management Strategy for the 21st Century* (2006) and *Implementing Transportation Knowledge Networks: A Business Plan* (2010) call for a National Transportation Knowledge Network (NTKN), a coordinated network of consortia collaborating to improve information sharing across the United States. Strengthening and building the NTKN means integrating library and information science professionals into the research and planning processes at their respective agencies. This Toolkit starts transportation libraries on this path and helps advance those who are already on it.

Within the following pages are strategies and guidelines for transportation libraries to more effectively capture and communicate the value of information services to their parent organizations. Based on best practices and anecdotes, techniques for data gathering, assessing value, and tailoring the message are all covered here. While most are adjusting to doing more with not enough, making the investment in valuing library services can be the tactic that builds champions and garners support at the local organization and within the national transportation community.

Amanda J. Wilson  
Director, National Transportation Library  
U. S. Department of Transportation

# INTRODUCTION

PURPOSE OF TOOLKIT

RESEARCH PROCESS

FINDINGS

TOOLKIT DESIGN



## PURPOSE OF TOOLKIT

Historically, all types of libraries have faced pressure to demonstrate their worth. Professional literature supports this. In fact, “valuation studies reach [at least] as far back as the 1970’s.” (1) Though an overwhelming amount of research assessing public and academic libraries has been published, the same is not true for special libraries. When narrowed to transportation, the literature is almost non-existent. This lack of research underscores the need to investigate and develop tools to help transportation libraries demonstrate their value.

Of the more than 55 valuation/ROI reports that the authors identified, nearly 50 were aimed at academic and public libraries.

It’s important to recognize that the transportation library community does have a tool to determine value, or in this case, the return on investment (ROI) produced by a specific library. (2) Jerry Baldwin’s 2003 ROI calculator was a welcome solution that gave practitioners some means to address this issue, however much has changed over the past decade. It is now commonly accepted that holistic solutions should be adopted instead of the prevailing “dollars and cents” approach. As Carol Tenopir notes, “Libraries don’t convey ‘cost’ using prices like many services so they have to be aggressive in communicating it other ways.” (3)

Financial figures are still important (as you will see later on), but these do not completely present, nor do they help management understand, the value a library

brings to its organization. To communicate this, librarians must “articulat[e] a value proposition that can be expressed in social as well as economic terms and present [...] in credible and evidence-based advocacy arguments.” (4)

In other words, transportation librarians need to provide management with examples of how their library provides value based on stories or narratives, while also incorporating hard counts to support key facts. Indeed, “there is a hard and soft side to measuring value. The soft side is intended to directly confront a growing narrative of library decline.” (1) This Toolkit was created to provide examples, guidelines, and applications of this approach. It was written by the authors after conducting in-depth research, analysis, and discussions, and by evaluating this approach in the field.

Additionally, this Toolkit was developed to address the perception that libraries are less relevant than they once were. Perhaps on-site usage is not what it used to be. With changes in technology, however, the project team believes that the services which libraries provide have remained the same (or increased), staff has found ways to do more with less, and improved services continue to be offered. It is the responsibility of librarians to prove this.

Still, the reality is that many transportation libraries have not been effective when identifying, documenting, and demonstrating their successes. Some contributing factors include:

- ① “The tendency of librarians to market their libraries and library services as a product class rather than as a unique service delivering specific and quantifiable benefits.” (5)
- ② “The view of the library as a cost centre, a vulnerability exacerbated by the tendency of librarians not to take the needs of the accountants and lawyers who manage our organizations seriously.” (5)
- ③ That librarians tend to be introverts, undervalue themselves and their services, and have a hard time tooting their own horn.

We are at a point where “[...] library leaders and advocates are strongly voicing the need for new and convincing arguments that link library facts and figures to community development and social and economic prosperity.” (4) As managers, transportation librarians need to realize that, generally, our approach to communicating value may need to be refocused to include

**“Recent cost/benefit analyses using tools developed by business and industry suggest that public libraries often outpace other sectors in the efficient use of tax dollars.”**

{ WORTH THEIR WEIGHT/  
AMERICANS FOR LIBRARIES COUNCIL }

areas not previously considered. If these issues have been ignored, then they need to be addressed.

Simply put, it is the belief of the authors that we have reached a threshold: libraries must adapt and become better communicators or they will run the risk of reinforcing a false narrative—that libraries are relics and everything is online—and suffer the consequences.

## RESEARCH PROCESS

This Toolkit is the product of a comprehensive literature search. It distills contemporary research for the transportation library community. A survey was conducted to gather primary information and supplement our findings while ROI calculator options were developed. Real world lessons were requested from practicing librarians. The authors brought a variety of perspectives to this project: one is a contractor solo-librarian, one is the manager of a state government library, and the third manages a private university library.

## FINDINGS

According to our research, we determined that a balanced approach is best for transportation libraries to prove value. We propose a number of qualitative success examples (stories) supported by quantitative metrics (hard counts) to make this point. One still needs to be conscious, however, that this is not a hard and fast rule—some managers may respond better to hard counts, while others may prefer a good story. The person gathering stories and metrics will need to decide the best approach to communicate. It is crucial that librarians be attuned to their organizational audience.



The team also found that communicating value is most accurately addressed by individual libraries. Some may argue that transportation organizations share common values, and the Toolkit should provide guidelines that could be applied anywhere. We disagree. What each organization values, their mission, vision, core values, etc., differs considerably. To be effective, librarians need to customize several broad guidelines to speak to their organization. Blindly following the guidelines contained in this Toolkit would be a mistake. There is no one-size-fits-all solution.

Additionally, though all transportation libraries perform similar work, they differ in how they provide services, how they are managed, the priorities they set, and what metrics they keep. After a period of analysis, the project team realized that all of these functions are specific to individual libraries. To properly document value requires the development of library-specific goals, metrics, and success stories.

Perhaps less understood are the benefits employees derive from library services that help them become better employees, individuals, and citizens. This social return on investment or “SROI...[and its] reporting practices developed by corporations and nonprofit organizations are capturing new types of ‘profitability’ and providing a broader picture of the value organizations [bring] to their communities.” (4)

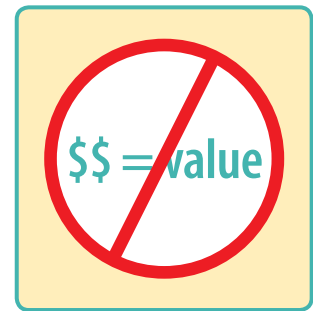
Yet to be determined is the value of social media and what benefits can be associated with it. We are all learning how to use these tools, and it will be exciting to identify ways to determine the rewards they provide.

Last, the use of ROI and calculator-based approaches needs to be addressed, especially their limitations. Dollar figures and statistics are not as objective as they are often perceived to be, and they rarely provide the context to frame figures. Other times, figures appear to be so optimistic that management can’t take them seriously. “ROI may provide us with calculations that seek to document a financial relationship between action and benefit, but too often in the library community, these studies are poorly constructed, ineffectively executed, and naïvely communicated.” (6)

## TOOLKIT DESIGN

This Toolkit was designed to be used by special libraries that support transportation professionals. Its focus, examples, and, to some extent, language, are geared toward the transportation information community. Its guidelines and findings may be applied to any type of library, however, and it is our hope that this Toolkit will prove to be useful to other librarians.

Although a calculator is included, its use is not emphasized. Instead, it is our firm belief that it is more important for librarians to spend their time gathering examples, collecting data, and crafting an effective product that will communicate value directly to decision-makers.



# INTRODUCTION

This Toolkit is not a shortcut, nor is it bulletproof. A substantial investment of time and effort will be required to gather all of the pieces needed to get you to the point where you can succeed. The Toolkit will not eliminate this reality; however, it will give you options on what pieces to gather, how you can gather them, how you can organize your findings, and finally, how to put it all together.

This Toolkit is not perfect. There may be guidelines, ideas, examples, and concepts that the authors either chose not to include or were simply missed. We ask your forgiveness and encourage you to contact the authors directly to express your views.

“Often, presenting ROI to administrators causes them to focus on the dollar side of things which isn’t the point.”

{NEAL, 2011}



# PLANNING AND PREPARATION

ORGANIZATIONAL ALIGNMENT

FACTS, ISSUES, AND PROBLEMS

VALUE VS. ROI





# PLANNING & PREPARATION

**“Value cannot be demonstrated until value is defined”**

{ OAKLEAF, 2010 }

Charging headlong into your boss’s office to elucidate the merits of your library isn’t wise, at least not without knowing what you are up against. The future may be unpredictable, but choosing not to plan is worse! Fortunately, by electing to familiarize yourself with several planning concepts, you can substantially improve your odds of “wowing” decision-makers. This chapter focuses on these concepts.

## ORGANIZATIONAL ALIGNMENT

An important issue for transportation librarians to understand is that of “organizational alignment.” Alignment refers to tailoring a library’s activities to promote specific and enumerated institutional goals. Demonstrating value requires that a connection exist between these activities and goals. Therefore, alignment is an instrumental step to consider during the planning process.

Alignment also entails determining how your library fits into the “big picture.” While this may be difficult, spending time reviewing your organization’s mission statement can help. It’s important to have a picture of the direction your parent agency is moving in. As noted in “Worth Their Weight”: “How does [a library] create added value? By aligning its goals with the economic

and social goals of the governance units within which it is embedded. By seeing other agencies as partners, rather than competitors. By understanding that it can work more effectively by sharing resources and cooperating.” (4)

Conducting a self-assessment will speed this process along. To do so, we suggest gathering your parent agency’s guiding documents (mission, vision, strategic plans, goals, core values, etc.). Next, create a list of library operations that support each objective. The aim is to produce a framework that illustrates what your library should promote. Another approach, when a mission statement isn’t available, involves talking to co-workers about what they perceive your employer’s goals to be.

Still, why should you align your library at all? Don’t goals change? What’s the point of aiming for a target that may be inconsistent or worse? Guiding documents can’t cover everything! Intuitive as this can be, we believe that such a conviction carries risk. If a library’s goals differ from its parent, it runs the risk of being seen as superfluous. The point of aligning to stakeholder values is to ensure that management cares about what your library offers.



## FACTS, ISSUES, AND PROBLEMS

Given their significance, in addition to alignment, several other issues deserve acknowledgement. Unfortunately, thanks to the day-to-day realities that most librarians face, it's hard to find time for planning. Although aligning with your agency is important, it's best to consider all planning issues and not just a few. The following checklist can help you do this:

- ☐ Alignment and Guiding Documents—Have you reviewed your employer's guiding documents? It's imperative to know what they say so you can position your library.
- ☐ Target Audiences—Identify who you are "selling" your library to. This will usually be supervisors and decision-makers, but sometimes the audience is different. What do they expect? What is their preferred method of communication?
- ☐ Success Stories—At some point you need to present success stories. What type of stories will resonate? Do you have any, and what do you need to collect them?
- ☐ Library Metrics—Transportation managers love metrics. Do you collect any that can supplement your stories? Do they align with your audience? Only collect data for activities that matter.
- ☐ Testimonials—Success stories and metrics are useful, but testimonials add a personal touch. Identify any patrons who might be willing to provide them.
- ☐ Documentation—It's easy to overlook annual reports and budgets. If they are available, analyze them for proof of your assertions. Aim to tell a coherent, progressive story.
- ☐ Time—Few librarians have free time. Realistically, how much time do you have to dedicate to advocacy work? Consider scheduling it on your calendar.
- ☐ Effort—You need to make a judgment about the amount of effort to invest. Do you think it will justify the reward?
- ☐ Working with Stakeholders—Does your organization permit working with stakeholders? Determine the pros and cons of including management in your effort.
- ☐ Telling Stories—Are you comfortable telling stories? If not, familiarize yourself with the art of storytelling, because any effort to demonstrate value requires this.
- ☐ Professional Literature—Our profession puts a premium on learning. Have you reviewed the recent valuation literature? Does it support the arguments you are hoping to make?

**“Begin with the end in mind.”**

{ COVEY, 2004 }

# PLANNING & PREPARATION

“The easiest and most succinct way to communicate ROI is on a per-library use basis. Doing so eliminates multiple chances for error. Still, this runs into the problem that self-reported information doesn’t match up with reality—only perception.”

{STROUSE, 2007}

By now, it should be apparent that planning is a complex process. To be sure, utilizing our checklist and drafting a sketch of your activities can simplify things. Doing this provides issues to consider and a guiding rule (alignment) to follow. It does not, however, address collecting usable, reliable evidence and presenting it, which is covered in Chapter 3.

Take presentations as an example. While most librarians focus on the specific implications of details and data, the medium and mode that facts are presented in matters. Different audiences expect different things, and your communication style often makes the difference between success and failure. Additionally, because information can be presented in a multitude of ways, an awareness of the factors that determine an optimal approach can aid planning.

**① Presentation Format**—Diverse formatting options exist. On one hand, you can adopt a traditional approach to make your case. On the other hand, an informal process may be best. Regardless, plan work around a format that maximizes your chances of success.

**② Time and Place**—It’s possible that you won’t have the luxury of determining where and when you present, but this too will have an impact. Do you need to schedule a meeting in advance? Develop a story that resonates. Be prepared!

**③ Content**—Although we recommend that you adopt a mixed approach—incorporating stories or anecdotes supported by metrics—there may be cases where only one is called for. Stay flexible, determine what your audience wants, and deliver it.

Finally, remain cognizant of the link between style and substance; metrics add teeth to your arguments. While we argue they should not be exclusively relied on, metrics are (generally) worth the effort to gather. It comes as a surprise, then, that in the course of our research, we found evidence that “[hard] metrics are collected in alarmingly low numbers, for corporate, academic, and government libraries.” (7)

Drawing on our professional experience, we believe that transportation is an outlier to this trend. Still, for those unfamiliar with the use of metrics, we recommend adopting a few principles. First, determine if metrics are worth collecting. Second, figure out where you can gather them. Remember that “successful metrics first and foremost speak to organizational and user values.” (8) We’ll go into more detail in the next chapter, but for now consider their sources:

- ① **Web Server**—Statistics from your server can be used to document visitors, and identify where they are coming from and what resources they are accessing.
- ② **Library OPAC**—Metrics on circulation, cataloging, and acquisitions are quickly accessible here. Most catalogs track figures automatically.
- ③ **Other Tools**—Financial management software, library/agency annual reports, surveys, vendor’s reports, and manual activity counts all can provide additional evidence supporting your value propositions.

“We have noted that the concept of social return on investment (SROI) is gaining acceptance in the corporate world.”

{WORTH THEIR WEIGHT/  
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Though this list isn’t comprehensive, it’s obvious that each provides a mechanism to collect normalized data. If you decide to gather metrics, look for similar tools and start well before you need them. The time may come sooner than you think.

## VALUE VS. ROI

Our final planning concept is substantially more abstract than those previously mentioned. Often, both librarians and the professional literature refer to value and return-on-investment (ROI) interchangeably. Given that this has become common parlance, we would like to set the record straight for the purpose of this Toolkit.

In simple terms, ROI is an approach that assigns economic value to organizational functions. It shows a specific dollar value that a library provides. For our purposes, however, “value” encompasses a much broader range of benefits. These benefits may include, but are not limited to: social, economic, emotional, and psychological outcomes. Thus, we view ROI, as traditionally used, as a small piece of a larger puzzle.

Historically, the library community has not seen it this way. Instead, the tendency has been to adopt processes in which a librarian assigns a monetary value to a quantifiable library function and then applies a mathematical formula to a metric to derive a cost. The result is then expressed as a monetary ratio: per every action the library undertook, the organization saved/spent this amount of money. These are most evident in the calculator models created by libraries and posted to their websites.

# PLANNING & PREPARATION

Realistically, not everything is quantifiable. In many instances, it's impossible to demonstrate that a return on investment has occurred using monetary terms, and reporting value using this approach, though direct, cannot represent everything a library brings to the table. Consequently, our research has led us to believe that it is the wrong approach to adopt in most circumstances.

To be sure, management will always be interested in the financial bottom line. Our issue is that financial considerations are only a piece of a much broader bottom line that includes other important factors. In this regard, we emphasize the provision of value as defined by the goals of a parent institution. We believe that value propositions can be expressed in broader, more meaningful ways than traditionally thought.



## WHAT TO COLLECT

- Anecdotes and Success Stories
- Contextual Documentation
- Relevant Information
- Financials
- Hard Metrics on circulation, cataloguing and acquisitions
- Testimonials

## WHAT NOT TO COLLECT

- Detached Figures
- Everything
- Nothing
- Cost-Intensive Data
- Unnecessary Information



Examples of what to collect: **Success Stories** (Above left): the MnDOT Library was the recipient of the 2012 John Cotton Dana Library Public Relations Award. **Contextual Documentation** (Above right): Washington State DOT's Main Library remodel featured compact shelving to maximize use of space.



# BUILDING YOUR CASE

ANECDOTES AND SUCCESS STORIES

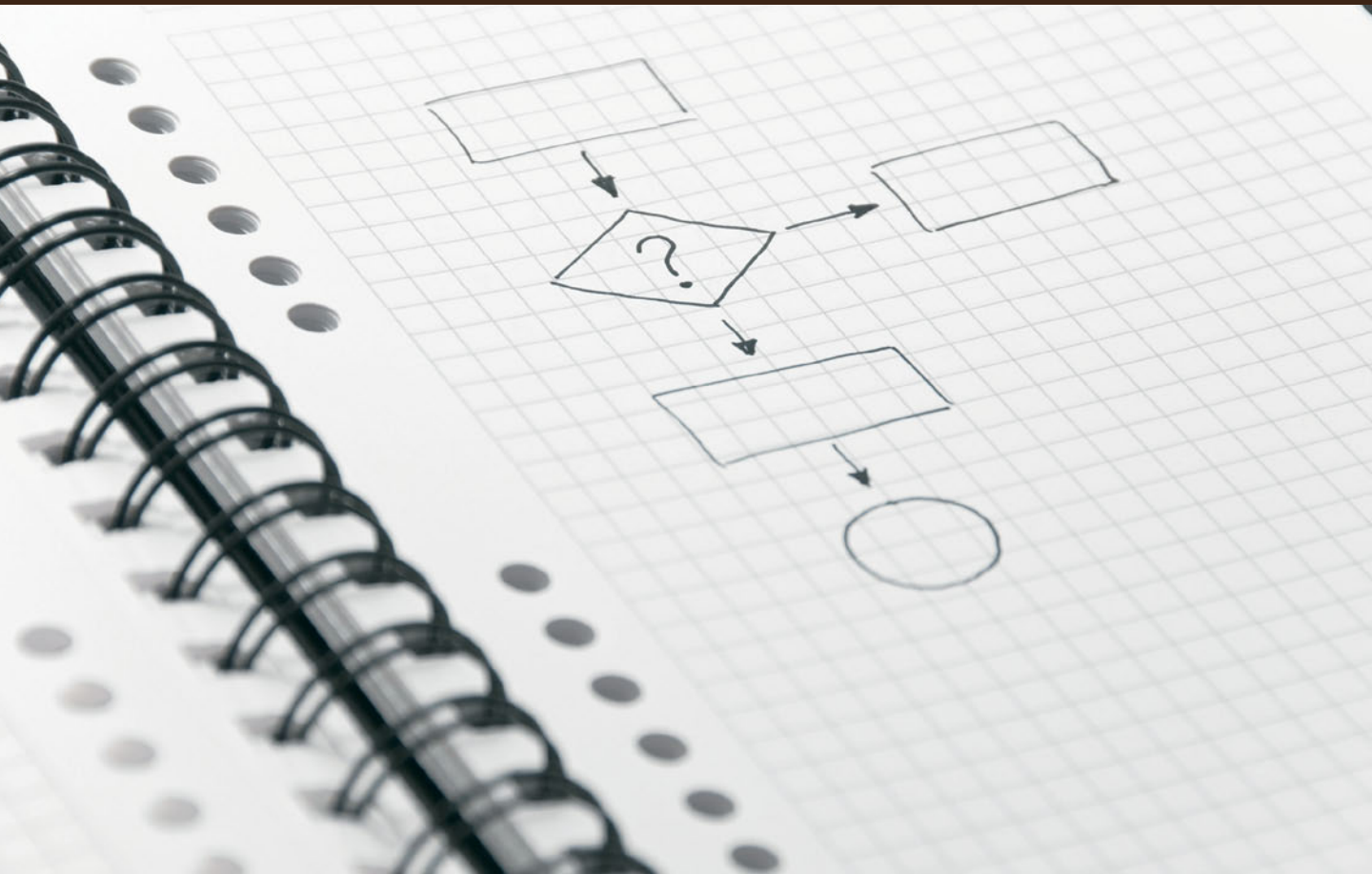
COMMUNITY AND SOCIAL IMPACT

METRICS AND STATISTICS

SURVEYS

CONTINGENT VALUATION

CALCULATORS AND  
THEIR LIMITATIONS



# BUILDING YOUR CASE

While writing this Toolkit, the project team surveyed patrons at twelve different transportation libraries. Out of 444 respondents, 77% said that their library's quality of service "exceeds expectations." Despite positive findings like this, many forms of assistance don't fall under a traditional numerical rubric; instead, they fall between the cracks, and while important, even lifesaving at times, they have a tendency to be overlooked. It's unfortunate, then, that the dangers associated with letting success go unnoticed may as well be considered an occupational hazard.

In the preceding chapter, we developed a planning framework to avoid this hazard. It was argued that ROI is used too often and that holistic approaches, ones encompassing more than basic statistical counts, are as close to an ideal as can exist. It was also explained why library valuation—that which is recorded and presented—should be tied to your parent organization's mission, goals, and objectives.

This chapter discusses both selling points and evaluation techniques. Intended to help you build your case, examples are provided of what your library may bring to the table. Cases-in-point are broken (a la carte) into six categories: Anecdotes and Stories, Community and Social Impact, Metrics and Statistics, Surveys, Contingent Valuation, and Calculators and Their Limitations. We suggest that you review these categories and then adopt instances or lessons learned which apply to you. We would also like to reiterate that this Toolkit leaves all choices about implementation up to the reader. Discussion has been limited to ensure that the principles set forth can be used in a variety of environments.

## SUCCESS STORY

“Access to technical standards is very important throughout our organization. The library is responsible for managing a subscription agreement with the producers of a national standards database. The library pays for agency-wide access to a selection of full text standards with the rights of unlimited access to the standards within our administration. In addition, when there is a need for a new standard it can be added to our selection with immediate access.

Our subscription cost is about \$130,000 a year. Last year our agency's staff performed almost 5,000 downloads of almost 1,000 different standards. Without a subscription, single access cost to a standard would generally cost \$200.

If, each of our almost 5,000 users had bought standards individually, the cost to our agency would have been \$1,000,000. The coordination of access to standards made by the library saves the organization a significant amount of money each year.”

## SUCCESS STORIES

“Our agency had not documented its history from the Interstate era to the present. When we celebrated a significant transportation anniversary, we had no documented history to refer to when the public or the media asked historical questions.

I proposed a research project to record formal, oral interviews with some of our Interstate “pioneers,” and detailed the background of some of our most important policies. The project would also document technical innovations and implementations that improved safety and saved money.

The project was awarded to a local university history professor with expertise in organizational histories and it is now underway.

Once completed, this project will: 1) illustrate the many facets of administration and planning of a statewide transportation system for new employees, 2) help us educate our legislators and policy makers in the executive branch about

transportation issues, and 3) provide the DOT public relations staff with answers to general media and public inquiries.”

“The Library provided valuable information which helped us develop a repeatable and measurable test with good relevance. This saved me at least 40 hours of my time. The newly developed test will provide means for comparing new components/features to current product ensuring design quality and safety for customers. It will also provide over 500 hours of labor/revenue for our location.”

“The librarian went the extra mile by searching out not only internal information related to a particular standard, but correlated the subject with similar standards. She also went so far as to reason out why some standards were used and why others were not. She also referred me to a technical expert who would be better able to answer questions on the procedure. Her efforts saved me a significant amount of time and quickly raised my understanding of the subject matter. Thank you very much!”

## ANECDOTES AND SUCCESS STORIES

An effective way to communicate value is by telling a story. Stories are easy to document and even easier to

understand. As such, they are exceptionally popular—an engaging story that grabs your reader’s (or listener’s) attention and communicates how a particular service impacted their work, if not the institution, is worth

# BUILDING YOUR CASE

talking about. For this Toolkit, we identified three different areas into which stories can be organized: Access, Administration, and Service.

## Access

Although metrics are well suited to track the quantitative aspects of library value, they have trouble measuring quality. Stories are quite the opposite. They can highlight lending and borrowing, cooperative projects, and gift management (among other things), all in ways that speak to the value of increased access to information.

- ① **Cooperative Projects**—Has your library been involved in a group project that expanded information access? Many transportation libraries submit reports to the TRID database.
- ② **Electronic Resources**—How is your library's website unique? Are electronic resources made available and can you tell stories about patrons using the site?
- ③ **Gifts**—Were any donations acquired and what was their impact on your collection?
- ④ **Special Collections**—Describe any unique material that your library holds. Sometimes it is one-of-a-kind. Northwestern University's transportation menu collection—the only one of its type in North America—is an illustrative example.

## Administration

Reflecting on the examples below, consider partnerships that your library has entered into and/or supports, identify staff accomplishments, and discuss administrative activities. Telling a good story will humanize your library and demonstrate that management does much more than oversee daily operations.

- ① **Business Decisions**—How has your support helped upper-management make informed business decisions?
- ② **Comparisons**—Can you provide a story of something that you are doing better, faster, and/or cheaper than another group?
- ③ **Grants**—Have you applied for, and received, grant funding to accomplish work that would otherwise be impossible? Does staff use library resources to apply for grant funding? State departments of transportation regularly vote on NCHRP proposals. In many instances these have been developed with the help of librarians.
- ④ **Partnerships**—Identify and describe all organizational partnerships (and the benefits that were received).
- ⑤ **Staff Accomplishments**—Are there reasons to brag about the people your library employs? Consider profiling them to showcase awards received, published writing, presentations, and committee work.

- ⑥ **Space Planning**—Have you provided support to aid remodeling and retrofitting efforts?



Karen Perrin, Technical Reference Librarian from IDOT Library—with two IDOT employees looking at the IDOT Author's Display

## Service

Libraries exist to serve their customers. Consider any research your library has conducted, problems it has solved, and examples of support provided to individuals and/or offices. Document issues that can't be communicated in any other way. Telling stories provides an opportunity to emphasize intangibles and highlight user satisfaction.

- ① **Current Awareness**—Are your users staying up-to-date using routing services (or something similar)?
- ② **De-accessioning**—There is a cost associated with keeping material. Has staff time been committed to de-accessioning, and were the materials properly disposed of?

- ③ **Digitization**—What types of digitization projects have been completed? The Los Angeles Metropolitan Transportation Authority's library digitized a substantial photo collection and saw an uptick in use after posting them online.

- ④ **Embedded Projects**—Were any of your librarians or staff embedded in major agencywide initiatives? How did this play out?

- ⑤ **Events Hosted**—Has money been saved and have travel expenses been avoided by using library space to host an event?

- ⑥ **Hard-to-Find Information**—Talk about resources that staff couldn't find on their own. Possible examples include old newspaper articles, unpublished reports, standards, etc.

- ⑦ **Institutional Publications**—Identify and present a bibliography of all internal and external publications to which the library contributed. Explain how the library was involved in their creation.

- ⑧ **New Services**—What services have been added in recent years, and what is planned for the future?

- ⑨ **New Employee Orientation**—Does your library participate in orientation? If so, do you help new hires get acquainted?

# BUILDING YOUR CASE

- ⑩ **Preservation of Resources**—What are you doing to preserve resources and ensure that they will be taken care of in the future?
- ⑪ **Public Display Area**—Does the library have a display area? What does it offer other than something pretty to look at?
- ⑫ **Research for VIPs**—Do you have any examples of service that was provided to high-level patrons? Stories about VIPs will stand out.
- ⑬ **Teaching**—How many classes or brown bag events were held? How many people attended? What did they learn?

colleges and universities. SROI can extend to the state, regional, and even national levels. When building your case, consider the communities that your library is a part of and determine how you made them “better.”

Today, it’s arguable that SROI is more important than ever before. “In an industrial society, inputs and outputs worked fine for benchmarking. But, as information workers in service economies grow, it is much more important to provide measures for outcomes and intangible impacts.” (9) Clearly stated, today’s workplace is different than it once was. It stands to reason, then, that the social impact your library has may be very important; enough so that it warrants a substantial effort on your part to promote.

## COMMUNITY AND SOCIAL IMPACT

Another way that libraries add value is by improving their respective communities. Framed as a social return on investment (SROI), these opaque benefits are increasingly seen as legitimate. Broadly defined, communities can be your organization as a whole, departments and offices within the organization, or local



Osher Lifelong Learning Institute (OLLI) members learn about the MnDOT Library.

- ① **Collaborative Space**—Discuss providing group workspaces, hosting cultural events, and reading clubs. Do you provide Wi-Fi, interview preparation for job applicants, and brown bag lunch presentations?
- ② **Community Events**—Has your library hosted any community events that fostered goodwill or received positive attention?
- ③ **Non-Work Issues**—Document how you help employees with problems that are not work related.
- ④ **Gathering Space**—What are you doing to make the library a center for the exchange of ideas? Do you host speakers and thought-provoking programs?





WisDOT library customers benefit from the welcoming iCommons space.

- ⑤ **Organizational Aura**—Some things make work a nice place to be. Does your library contribute to an aura of productivity and comfort? As an example, in 2007, the Wisconsin Department of Transportation (WisDOT) converted its library into an iCommons to make it more welcoming.

## METRICS AND STATISTICS

Though we believe that relying exclusively on metrics is unwise, we recognize they have a place in helping you to build your case. Hard facts lend a sense of gravitas. Indeed, “[i]t cannot be stressed enough that qualitative metrics [by themselves ...] only present a one-sided perspective in the subject of library value to your organization. So, the need remains to be able to use [...] quantitative hard facts to tell the stories brought out by [your] qualitative findings.” (10)

Despite our prior caveats, the use of metrics, especially quantitative ones, are important. We only caution that

“When our panel members turned their attention to this issue, they began to discuss concepts that might be used to capture a broader value picture. One of the most promising appears to be social return on investment (SROI) – a measurement approach developed by expanding traditional cost/benefit analysis to include the economic value of cultural, social, and environmental impacts.”

{ WORTH THEIR WEIGHT / AMERICANS FOR LIBRARIES COUNCIL }

they should be used properly to meet your larger, overarching goals. Metrics and statistics aren’t useful when reported as esoteric numbers, but instead require contextual framing and/or careful calculations. It is a delicate and interesting balance. Exceptions exist, but rarely when detached from the stories and foundations that help to make them relevant.

Additionally, metrics and statistics create a unique opportunity that stories and anecdotes cannot: the potential for standardization. One example comes from the International Standards Organization (ISO). ISO 11620:2008 “specifies the requirements of a performance indicator for libraries and establishes a set [...] to be used by [...] all types. It also provides guidance on how to implement performance indicators.” (11)

# BUILDING YOUR CASE

Although this standard isn't suited for transportation, it helps to illustrate a point. Metrics allow for standardization, and standardization lets you compare performance. If you want to show how your library stacks up against others, consider adopting benchmarks.

Finally, before providing applicable examples, something needs to be said about money. Libraries regularly face challenges that range from the political to the practical, but most often they relate to funding. Numerous studies demonstrate that libraries save money. While the philosopher Plautus once said that, "you have to spend money to make money," libraries typically do something different. They save money by saving time. As the old adage says: "Time is money."

Take the results of a 2007 study conducted by Outsell, Inc. This survey of special libraries "found that assistance results in an average of 9 hours saved per interaction." The study also "found that \$2,218 in direct costs is saved for each average interaction." (10) Public libraries in Florida, Pennsylvania, and South Carolina have also been determined to add between \$4.48 and \$8.32 to their state's respective economies per dollar invested. (1)

Although figures aren't available for transportation, our survey did identify two related facts. First, respondents indicated that they spend an average of 7.3 hours per week searching for information. Second, they reported an average wage of \$35 an hour. Demonstrably, organizations in the transportation sector seek out information and pay staff to do so. Figures like these as classified by Administration, Operations, and Services, like below, are of the sort you will want to utilize.

## Administration

Metrics and statistics are great for tracking administrative activity, especially when it connects to the budget. But, not everything can be properly quantified. When used in conjunction with anecdotes and stories (and properly arranged), administrative figures do a great job of revealing the contributions your library makes to the bottom line.

- ① **Dollars Saved**—According to your best estimate, how much money did you save this year? This quarter?
- ② **Dollars Reallocated**—Did you comb through your budget and reallocate funding to tasks and duties that were more important? If so, how much? Did performance factor into the equation?
- ③ **Employees**—How many full-time equivalents does your library employ? Can you link this to the level and quality of service provided?
- ④ **Free Resources**—Did your library use any free resources? How many times? How much was saved? Economic figures from the Bureau of Labor Statistics (BLS) come to mind as an example.
- ⑤ **Grants**—How much money did your library bring in through grants and donations?
- ⑥ **Multi-Year Subscriptions**—Did you save time and money by signing multi-year subscription deals? This can apply to any number of services.



- ⑦ **Publications**—How many internal and external publications did the library help to produce? How many did the library contribute to?
- ⑧ **Research Costs Incurred**—What percent of your budget was spent on resources that were needed by your patrons to conduct research? Why were those resources needed?
- ⑨ **Subscriptions Canceled**—How much was saved by canceling unnecessary subscriptions?

## Operations

Sometimes management glosses over daily operations, but it's also undeniable that lending, borrowing, and cataloging all contribute to the value that your library provides. Consider using metrics and figures here to spotlight operational activities. In a well-run library, all tasks add value, even routine duties such as labeling and shelving books.

- ① **Electronic Resources**—Libraries often purchase access to e-books and journals (rather than the items themselves). How many digital publications and/or resources did your library add? How many of these are accessible thanks to a subscription?
- ② **Licensing and Copyright**—Publishers and some subscriptions demand unique licensing requirements. How much time is spent reading licensing agreements and ensuring that copyright laws are followed?

- ③ **Gifts and Donations**—How many items have been donated to the library? Was money donated? Consider breaking these figures down by how the gifts and donations were acquired and their type.
- ④ **Items Added**—Track the number of items that you added to your collection. This will document long-term growth. Figures can be subdivided by serials, monographs, electronic access, etc.
- ⑤ **Items Cataloged**—How many items did your library catalog? Of these, were any unique? Management may view cataloging as a clerical function, so determine if this is relevant to them or not.
- ⑥ **Operational Changes**—What processes, practices, and procedures did you change that helped to make your library more efficient? Can you quantify any savings and/or efficiencies?

## Services

Services are the most important thing that a library can provide. Even though stories can communicate value, metrics, especially when collected over long periods of time, show precisely how many times a service was utilized and how often patrons relied on it. When trying to communicate a known quantity of a given service, metrics are the best tool for a library to use.

- ① **Circulation**—While overused, circulation figures are effective in demonstrating how much material has been used. Circulation counts may or may not include digital files accessed online.

# BUILDING YOUR CASE

- ② **Inter-Library Loans**—Does your library offer inter-library loan service? If so, how many items did you borrow? Were these materials requested from partner libraries? Some engineering publications such as the *Standard Specifications for Highway Bridges* are very expensive.
- ③ **Reference Questions**—How many reference questions were answered? Better still, how many of them were detailed? Who were these questions asked by, and what divisions do they work for?
- ④ **Repeat Customers**—Do you track total repeat customers? This can provide a rough estimate of customer loyalty.
- ⑤ **Hours Defrayed**—How much time did staff spend conducting research for engineers and management? If you track the number of hours defrayed, then it's possible to show that the library freed staff to work on other things.
- ⑥ **Routing**—Does your library route journals and periodicals? How many people did these items circulate to?



MnDOT Librarians identified major employers along future MnPASS corridors, providing valuable data for incorporating into marketing efforts.

## SURVEYS

In the last chapter, we discussed what your library should consider before starting to build your case, data collection being the most important. Thanks to their dynamism, surveys are an exceptionally utilitarian data collection tool. They provide not only an efficient way to collect information, but have the added benefit of concurrently gathering user opinions.

To collect qualitative (stories) and quantitative (metrics) information, we suggest that you consider conducting a survey. Specific needs are best addressed by targeting a particular audience. It's worth noting that the process does not have to be burdensome and all-consuming; all you need to do is collect enough information to assess a given issue. Questions should be customized to fit your agency, and it is highly possible that someone within your organization is experienced at creating and administering surveys. Ask for their assistance!

To help you, our survey that was developed to collect supplemental figures is provided in Appendix A. It can be adopted in part or as a whole for you to use. We also recommend that you review the following guidelines from *Internet, Mail, and Mixed-Mode Surveys: The Tailored Design Method*: (12)

## SURVEY GUIDELINES

- ✓ Use simple and familiar words.
- ✓ Be sure the question specifies the response task.
- ✓ Visually standardize all answer spaces or response options.
- ✓ Integrate special instructions into the question where they will be used rather than including them as free-standing entities.
- ✓ Provide unit labels with the answer spaces.
- ✓ Provide extra motivation to respond.
- ✓ Develop lists of answer categories that include all reasonably possible answers.
- ✓ Use forced-choice questions instead of check-all-that-apply questions.
- ✓ Place sensitive or potentially objectionable questions near the end of the questionnaire.
- ✓ Consistently identify the beginning of each question and/or section.
- ✓ To the extent possible, personalize all contacts to respondents (even when names are unavailable).
- ✓ Send a token of appreciation with the survey request.
- ✓ Keep e-mail contacts short and to the point.
- ✓ Actively seek means of using follow-up reminders in order to reduce non-response error.
- ✓ Avoid encouraging higher ratings during the delivery of the survey request.
- ✓ Choose measurement devices that will have credibility with those who will use the results, as well as with respondents.

Finally, in the event that you choose to conduct a survey, we recommend that you stay mindful of three issues (these may or may not be obvious, but can influence your survey results): First, note the difference between informal and scientific surveys. Informal surveys equate to a straw poll and scientific surveys gather information from a group representative of a larger whole. Second, not all surveys produce accurate results.

Additionally, surveys are only as effective as the process that is used to gather data. Indeed, “[b]efore conducting research it is suggested that interviews be conducted with users to help shape the survey. It is very easy to produce a poor survey if it is not planned correctly.” (9) Building on this recognition, also know that, “[u]ser feedback, [...], is notoriously difficult to obtain—work-

# BUILDING YOUR CASE

ers often say they are too busy to respond, and typically they don't attach much importance to a survey from the library." (13)

## CONTINGENT VALUATION

The fifth way that you can make your case involves utilizing a survey-based economic technique to determine the value of non-market resources. Recall earlier that libraries don't charge for their services in the same way that the private sector does. "Contingent valuation estimates a library's value by what would be lost in terms of access to materials and services and cost of alternative information services if the library ceased to exist." (14)

Based on our survey, which found that 86% of respondents believe that their transportation library is "a worthwhile use of money," most patrons agree they contribute to their organizations. But, to an extent, knowing this does not provide a way to ascertain enumerable values. Contingent valuation allows this by providing a framework from which to ask, not if a library is worth the cost, but what that cost would be if the library did not exist. This makes it possible to collect user-reported feedback, which can be used as an analog to traditional dollar amounts.

A potential drawback to this approach is that relying on numerical responses may introduce a degree of variability. After all, not all library users feel like they can put a price on the services that a library provides. Opinions may differ from person to person. That said, the contingent valuation model can also be carried over to non-statistical methods by posing practical questions as you report to management. For example, ask if your library did not exist:

- How would staff stay abreast of current happenings in their field?
- Where would engineers and planners obtain standards and specifications?
- How would research publications be preserved and made available?
- Who would manage donations as staff retires? Would their collections be thrown away?
- How expensive would it be if the department paid for individual subscriptions as opposed to institutional ones?
- Who would manage digital licensing issues?
- Would the department lose staff that would migrate to an agency that offers continuing education resources?

## CALCULATORS AND THEIR LIMITATIONS

A final way that libraries can determine value involves the use of predefined ROI calculators. Typically built to take numerical statistics and produce a defined output (benefits) as compared to cost (expenses), we have yet to find one that is adaptable to every possible environment. Calculators are arguably better than nothing. They can produce great looking figures which may be hard to qualify. They also are devoid of any sort of story component, and are subject to the same problems as statistical approaches. Therefore, we suggest that you use them cautiously. Many variables need to be taken into account to accurately measure value.

ROI calculators do, however, have a long history and certainly deserve to be mentioned. Unfortunately, in

the course of conducting our literature review, nearly all examples came from public and academic libraries. They do not translate well to either special libraries or the transportation industry. Still, an example is provided in Appendix B for you to review and/or customize.

That said, research from the Americans for Libraries Council provides some interesting data. According to *Worth Their Weight*, “A benefit-to-cost ratio of 3:1 or better is common among the library valuation studies [...] reviewed.” And, also worth noting, “Because this type of economic analysis is commonly used across industries and businesses, it puts libraries into an evaluative framework that permits comparisons with other

types of organizations. When this occurs, public libraries consistently outpace other sectors.” (4)

In the event that you choose to adopt an ROI calculator-based approach, stay mindful of the lessons from the previous sections. We recommend that telling stories enhanced by metrics and statistics is best. At least one investigation substantiated this approach by stating that, “[e]stimating ROI should be based on identifying and surveying knowledge workers using a mix of questionnaires and in-depth interviews.” (9) But, it is certainly possible that management expects a numerical comparison of costs-to-benefits and calculators are excellent at providing that.

## A DIFFERENT KIND OF STORY

### The Unintended Consequences of Perceived Value by Using an ROI Calculator

“A few years ago as part of a justification for a major purchase, I was tasked by my supervisor to come up with some return on investment (ROI) figures for the library. My research led me to the National Network of Libraries of Medicine ROI ‘retail value’ calculator (<http://nnlm.gov/mcr/evaluation/roi.html>). I quickly realized that I either had or could accurately estimate the required data to plug into the calculator. The ROI of our library to our organization was beyond significant: it neared 240%. My supervisor was very pleased and all the figures were included in the budget proposal.

Unfortunately, when the proposal was submitted for approval by upper management, the deputy director overseeing it immediately demanded that the ROI information be removed. She indicated that the 240% ROI figure could be used as an argument to cut the library's budget in half while at the same time argue that the library could continue to be of significantly more value than its operational costs.

*Perhaps I should have anticipated that showing a high cost/benefit ratio for the library could be interpreted as the department getting more than it needed.”*

**Suggestions:** Use a more realistic 1:3 ratio; don't rely on hard metrics alone, use them to illustrate stories. Hard metrics by themselves do not represent the full value proposition the library brings to the organization.

# COMMUNICATION

CRAFTING A NARRATIVE

PRESENTING FINDINGS

CONSIDERATIONS





As information experts, the expectation is that librarians should provide the best, most authoritative information to the decision-makers who oversee them. In good economic times, it may be accepted that some things (like libraries) sell themselves. But, for better or worse, logically collecting evidence and presenting it to management won't guarantee that you'll win them over or even communicate value. The dictum that style trumps substance is often true.

**“Over the past decade, most library supporters have come to understand that advocacy is much more than lobbying – it involves strategic communications, outreach to stakeholders, and partnerships with institutional allies, and mobilization of users of all ages and types.”**

{WORTH THEIR WEIGHT /  
AMERICANS FOR LIBRARIES COUNCIL}

This chapter explains why communication matters. First, it shows how to craft an overarching narrative that can utilize the techniques presented in the previous chapters. It explains how, when, and where you should make your case. Finally, auxiliary considerations—especially those that “connect the dots”—are taken into account.

## CRAFTING A NARRATIVE

Do you recall earlier how we discussed storytelling? To communicate value, you'll need to tell a story. Unlike in the previous chapter, however, the goal should not be to discuss specific, detailed issues. Instead, the goal should be to craft a larger narrative that aligns with your agency's values; is tailored to fit your audience; synthesizes metrics, anecdotes, and other information into a set of coherent points; and suits the format and environment in which you present.

Take the dual factors of alignment and your audience. It has been established that you should be collecting information to prove that your library helps achieve institutional goals. Communicating value, however, requires that you go a step farther. Success in this endeavor is a function of what you say and who you speak to.



Librarian Laura Wilt from Oregon DOT describes library services to a customer during an open house.

In terms of what you say, it's important to do two things: speak coherently and talk about issues that matter. It's easy to stay on topic—assuming, of course,

that you completed the alignment checklist in Chapter 2—but speaking with a clear voice takes work. Setting aside questions of how to do this, presenting a narrative is vital. When doing so, focus on topical, relevant issues that relate to the “big picture.” Otherwise, your audience is left to make sense of things on their own.

Identifying who your audience is also matters. By necessity, selling your library requires talking to people, but not everyone is the same. As a case in point, the U.S. Secretary of Transportation cares about different issues than a traffic engineer in Montana. Reflecting on this, another reason to build your case around a narrative is that value isn’t touched on when you say what you think your audience wants. You need to touch on what they really want. (15)

Last, considerations relating to evidence, format, and your professional environment play a role in shaping what your message should look like. Unfortunately, none of these issues can be acted on without knowing how they relate to your library. Consequentially, a rule of thumb is to simply, “[t]ell the whole story. Explain not just what you did, but why you did it.” (16)

## PRESENTING FINDINGS

As important as it is to craft a clear, consistent narrative, even the most alluring story needs to be grounded in reality. Presenting, and proving, that your library adds value is a complex undertaking. It is nuanced enough, in fact, that any attempt to make a value proposition should be tailored to fit your environment.

Undoubtedly, libraries should market themselves. But, how this is done impacts your prospects for success. Keeping with this spirit, this section presents tips, tricks, and suggestions (as below) to use in developing your communication pieces. These include a discussion of formatting, language, and content. Each should be considered when developing your message, supporting it, and when trying to win over an audience.

**“A value proposition will state the measurable value or tangible customer benefits that a product or service will provide to its customers and will illustrate the return on the investment or other tangible positive outcomes of choosing a particular service provider over its competitors.”**

{CAMLEK, 2010}

## Formats

The famed media theorist Marshall McLuhan once wrote that: “the medium is the message.” By this, he intended to argue that how information is presented can shape what type of message is conveyed by a given work. As you prepare your communication tool, bear this in mind. The format you adopt can impact what is communicated.



For example, time constraints determine what your audience is drawn to. When time is an issue, white papers, metric dashboards, and equivalent approaches are best—your audience will be looking for quick “take-aways.” Other times, management may ask for an objective accounting of library activities. If this is the case, present them with an in-depth research report. Last, depending on your organization’s culture, some formats are preferred, while others are habitually eschewed.

Regardless, options to consider include:

- **Conversations**
- **Metric Dashboards**
- **Podcasts**
- **Presentations**
- **Research Reports**
- **Videos**
- **White Papers**

Although it’s up to you to choose what medium to adopt, the primary issue is straightforward: pick a delivery mechanism that complements your narrative and suits your professional environment. Share stories of your library adding value and incorporate facts or figures when necessary. To help you along, examples are provided in Appendix C that can be used as a handy reference.

## Language

Another issue to consider is the use of language. Fortunately, language is easy to control for by adopting high-impact keywords and incorporating basic communication principles. Indeed, coupled with on-target messaging and formatting, the effective use of language is a powerful tool with which you sell your library.

In regards to terminology, research conducted by the Special Library Association (SLA) is illustrative. Starting in 2007, the organization conducted an alignment project that included a study of how keywords shape managerial perspectives. Based on interviews, favorable terms were collected. (17) Although using these terms may not improve your outcomes, we recommend that you review them to clarify common biases and misconceptions.

## WORDS AND TERMS

### *Don’t Use*

Acquisition

Collection Development

Cataloguing

Information Analysis

Library Instruction

Reference

Taxonomy & Metadata

Online Searching

continued on next page

Words and Terms, continued

## ***High-Value Words***

Anticipates Industry Trends  
Culture of Continuous Learning  
Collaboration  
Expert Analysis  
Facilitates Good Decision-Making  
Gain Competitive Advantage  
Innovative  
Insights and Trends  
Knowledge Sharing  
Leadership  
Value-Added Intelligence

## ***Use***

Classification  
Customer Assistance  
Market Intelligence  
Organizing  
Purchasing  
Research  
Selection  
Teaching

## ***Words That Work***

Advantage  
Association  
Insight  
International  
Knowledge  
Professional  
Strategic

## ***Other Words to Recommend***

21st Century  
Advocate  
Catalyst  
Continuous Improvement  
Collaborative  
Data Driven  
Mission Driven  
Outcome Driven  
Professional Learning Community  
Transformative  
Transparency  
Visionary

## Integrating Content

The last thing to consider before communicating with stakeholders is how you should incorporate content into your final product. Already, Chapter 3 enumerated ways that you can build your case. Having crafted a narrative, determined a format, and tailored your language, what remains is to prove your point.

To be clear, integrating content can be accomplished in different ways. Rather than focusing on specifics, we feel that you would be best served by addressing larger, inter-related issues. The point of adding supplemental evidence is to support findings. What you present to stakeholders is important, but above all else, one thing should be clear: if you are able to keep your message interesting, tie it to examples, and are able to verify points by providing context, you'll be ahead of the curve.

## Tips for Content

- “[Library] stories must be human interest stories. Look for and emphasize the benefits that libraries provide people. Whether related to saving lives or saving fuel, tying [library] programs to real people helps to improve your message.
- Link to current events. Connect your [library] to what is happening in society or in your community or organization. Do not overlook popular media as a source of inspiration. [... M]ovies can give your communications a point that is relatable to the audience.
- Give specific examples. As you conduct staff interviews about their needs, take pictures and keep notes. These can add personal elements to your communications.” (16)

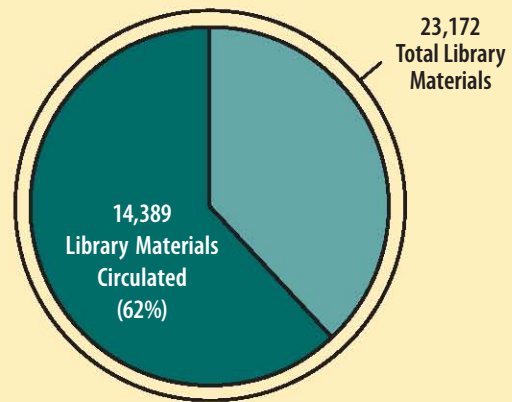
## THE VALUE OF VISUALS

### Data without visuals:

Library materials circulated: 14,389

Total library materials: 23,172

### Data with visuals:



## CONSIDERATIONS

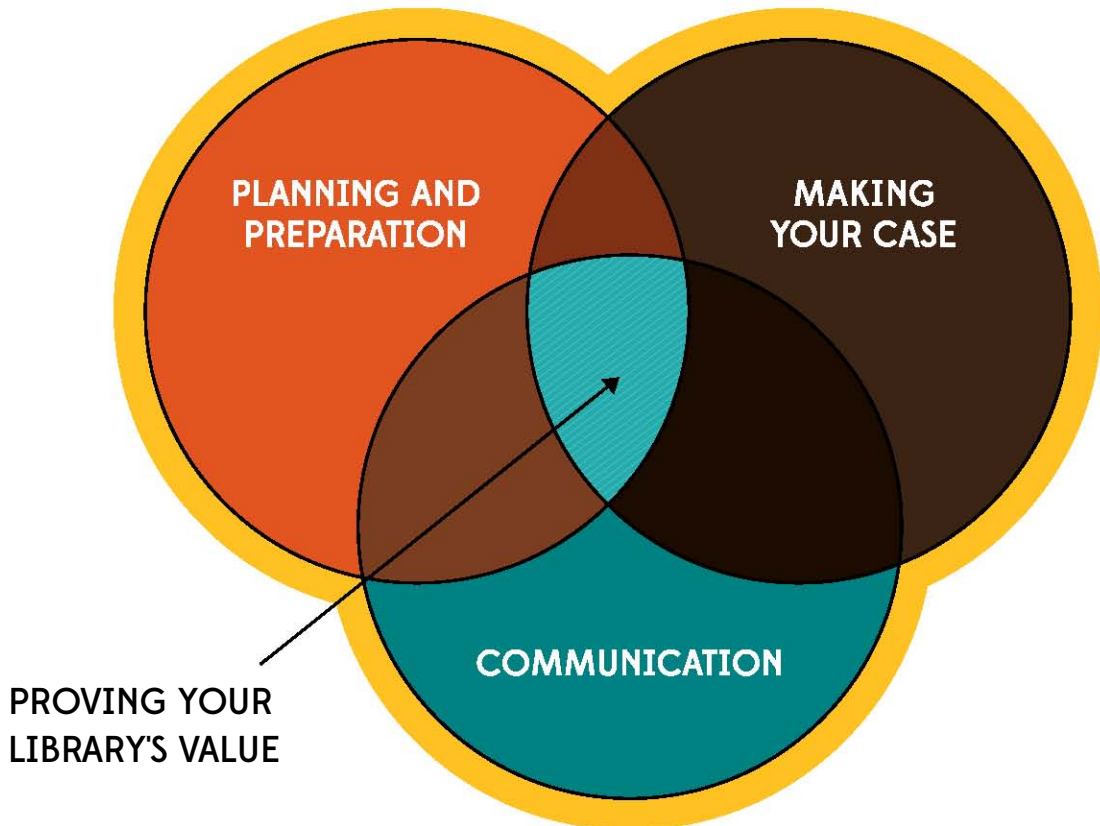
This chapter has provided suggestions about how to prove your library's value. For some, it may appear somewhat disjointed, with more specific recommendations being desired, but holistically the result is a set of focused communication practices. After all, it has been determined that you should craft a narrative to convey your library's worth. It has been found that your choice of language and formatting matters. Finally, tips for integrating content were provided to help buttress your arguments.

# COMMUNICATION

Taken as a whole, these issues reflect the understanding of the Toolkit's project team. Communication matters insofar as it is necessary to prove your library's worth. Having progressed this far, what remains is for you to "connect the dots" for your audience.

When do you present? Where do you present? What would your organization be like if the library didn't exist? All of these remain to be answered, and cer-

tainly they are important questions. Unsurprisingly, the answers to these questions can be found in your previous work. It's fitting, then, to leave the answers to you. By now, you should be familiar with the ways your library adds value. Without deviating from the guidelines we've presented, start making plans to bring them to the attention of others. **It's time for you to make your case.**



# CONCLUSION

FINAL PRODUCT

WHERE TO GO FROM HERE?

FINAL THOUGHTS





## FINAL PRODUCT

It is the authors' hope that the previous chapters were informative, illustrative, and instructive. If you plan to build a case that tells your library's story and demonstrates its value with supporting documentation, it must be aligned and tied to what your institution values. What you value matters. What the leaders of your organization value matters more.

One great story that relates the impact of a library on a bottom line will convey value. Don't turn in your circulation statistics or number of reference questions answered, but instead, use a combination of qualitative value supported by quantitative statistics where relevant. Surveys, calculators, and the use of contingent valuation may be useful in your particular situation for framing evidence. Capitalize on SROI (Social Return on Investment) and include how your library is a gathering space that supports idea generation and your collaborative efforts with other offices. Take a hard look for the value your library provides, but which has gone unrecognized.

To maximize the impact of your efforts, be clear, concise, and incorporate high value language. Avoid library jargon as much as possible, and speak in a language your audience relates to. Also, be sensitive to your audience's needs as you consider the amount of content to include and the appropriate delivery mechanism.

## WHERE TO GO FROM HERE

Once your work is completed, take a moment to gather feedback from your audience. Just know that your work is not done; library valuation is an ongoing process. Recognizing and documenting the ways that your

library adds value should become a way of life, something for which time is built into your work calendar.

Keep an open mind as you consider what value your library is bringing to your organization, while also keeping an eye out for new developments. Talk with your colleagues, share experiences and outcomes, and take the opportunity to learn. Once you have been through the process, consider re-writing your position description, and that of additional library staff, so that the work and tasks reflected in them are aligned with and reflect the mission, vision, and goals of your institution.

## FINAL THOUGHTS

If the transportation sector is really dealing with a "new normal," then money will be scarce in the future. A consequence of political gridlock and high gas prices, transportation libraries will become targets for downsizing. Indeed, this has occurred many times over the past 10 years. None of us can predict when this will occur next, but we can take steps to prepare and position ourselves as a valuable partner within our organizations, one that staff cannot live without and one they will advocate for on the library's behalf.

As we reflect on our individual library's value, a logical next step is to take this work to the network level. Proving the value of Transportation Knowledge Networks—the value of library partnerships among our community at large—cannot be overstated. This will need to wait for a subsequent publication, but as you work through the process locally, take note of the importance of other transportation libraries and how they helped you serve your customers. A time may come where this knowledge will prove invaluable.

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## APPENDIX A: SURVEY

### METHODOLOGY

To gather unique data for this Toolkit, a survey was administered at twelve transportation libraries in the United States. This unscientific poll was directed at library users. Countermeasures were also applied to prevent selection bias. Available resources show that this survey was the first of its kind in the transportation sector.

Offered online, participating librarians administered the survey to their patrons. Individuals who sought unrelated assistance (e.g. asking for directions) or those who did not use the library of their own accord were not polled. Finally, several agencies chose to distribute the survey via newsletters and e-mail.

As the results were compiled, it was determined that two libraries circulated more copies of the survey than their peers. Given that these agencies accounted for less than one-third of all responses, they do not appear to have skewed the results. Responses including falsified, half-completed, or error laden inputs, however, were determined to be non-entries and amended—or eliminated—as appropriate.

### QUESTIONS AND RESULTS

Question 1: What is your age?			(n=444)
21 and under	0.2%	1	
22 to 34	17.3%	77	
35 to 44	20.3%	90	
45 to 54	32.7%	145	
55 to 64	24.3%	108	
65 and over	5.2%	23	

Question 2: What is your gender?			(n=444)
Male	66.7%	296	
Female	33.3%	148	

## Appendix A: Survey, continued

Question 3: What is your highest level of education?			(n=444)
High school (or less)	2.0%	9	
Some college	13.3%	59	
Bachelors degree	43.5%	193	
Masters degree	30.9%	137	
Doctoral degree	7.4%	33	
Professional degree (e.g. J.D., M.D.)	2.7%	12	

Question 4: What best describes your job?			(n=444)
Administration	9.5%	42	
Clerical	3.8%	17	
Communications	2.5%	11	
Construction	7.4%	33	
Design	24.3%	108	
Information Technology	2.9%	13	
Legal or Paralegal	1.8%	8	
Maintenance	2.7%	12	
Planning	9.9%	44	
Research	11.7%	52	
Traffic	6.5%	29	
Other	16.9%	75	

Question 5: Where do you work?			(n=444)
State govt.	89.6%	398	
Local govt.	0.0%	0	
Federal govt.	6.1%	27	
University	0.2%	1	
Private sector	1.1%	5	
Non-profit	1.6%	7	
Other	1.4%	6	

# APPENDICES

## Appendix A: Survey, continued

Question 6: What is your annual salary in dollars? (n=420)	
Average: \$73,568	
Number Skipped: 24	

Question 7: I often use the transportation library for work. (n=444)				
Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
22.3%	38.3%	20.0%	14.2%	5.2%
99	170	89	63	23

Question 7a: [...] and when I do [...] I save time. (n=444)				
Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
32.4%	41.0%	22.1%	2.5%	2.0%
144	182	98	11	9

Question 7b: [...] and when I do [...] I save money. (n=444)				
Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
35.8%	30.9%	29.3%	2.3%	1.8%
159	137	130	10	8

Question 7c: [...] and when I do [...] my performance is improved. (n=444)				
Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
34.9%	43.2%	18.2%	2.0%	1.6%
155	192	81	9	7

Question 7d: [...] and when I do [...] I utilize information that I would not have found otherwise. (n=444)				
Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
37.4%	38.3%	20.0%	2.7%	1.6%
166	170	89	12	7

## Appendix A: Survey, continued

Question 8: Service provided by the transportation library exceeds my expectations. (n=444)				
Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
45.0%	32.4%	18.0%	2.7%	1.8%
200	144	80	12	8

Question 9: Management provides the support that the transportation library needs to succeed. (n=444)				
Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
14.2%	27.0%	47.7%	8.6%	2.5%
63	120	212	38	11

Question 10: The transportation library is a worthwhile use of money. (n=444)				
Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
51.4%	34.7%	12.2%	0.9%	0.9%
228	154	54	4	4

Question 11: Libraries (as a whole) are entering a period of decline and becoming irrelevant. (n=444)				
Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
5.0%	9.7%	18.5%	39.6%	27.3%
22	43	82	176	121

Question 12: I often search for information as part of my job. (n=444)	
Yes	No
84.0%	16.0%
373	71

Question 12a: If you selected "yes" [...] On average, how much time do you estimate that you spend weekly? (number of hours) (n=365)	
Average: 7.3	
Number Skipped: 79	

# APPENDICES

## Appendix A: Survey, continued

Question 13: Having access to authoritative information is important to my success at work. (n=444)					
Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	
48.9%	42.3%	8.3%	0.2%	0.2%	
217	188	37	1	1	

Question 14: I have the time to search for information well. (n=444)					
Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	
7.7%	36.5%	29.7%	20.5%	3.4%	
34	162	142	91	15	

Question 15: I search for information on my own rather than utilizing library services. (n=444)					
Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	
4.3%	34.0%	38.1%	20.0%	3.6%	
19	151	169	89	16	

Question 15a: [...] and when I do [...] I am satisfied with the quality of information I find. (n=444)					
Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	
9.5%	49.5%	33.6%	6.3%	1.1%	
42	220	149	28	5	

Question 15b: [...] and when I do [...] I am able to find what I am looking for. (n=444)					
Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	
9.5%	48.6%	34.5%	6.3%	1.1%	
42	216	153	28	5	



## APPENDIX B: CALCULATOR

### ABOUT

This calculator shows how it is possible to estimate your library's return-on-investment (ROI). Additionally, several other examples are provided in the Bibliography. In each case, the result is expressed as a numerical ratio (savings to cost) that distills value into monetary terms.

How you determine ROI depends on the way you quantify savings and costs. While reviewing the literature, it was determined that ranges should extend from 3:1 (4) to 10:1 (18) and even as high as 12:1 (2). Consequentially, figures will vary depending on the services you are able to enumerate.

### SUPPORTING DATA

(i) To calculate time saved by reference questions, figures were taken from Outsell's 2007 survey. (ii) Hourly compensation was determined by utilizing survey information from Appendix A. (iii) External costs refers to funding that your library brought in like awards, grants, and fees.

(iv) The cost of publications were estimated by adopting the average price of an National Cooperative Research Program (NCHRP) Report, or (v) a used, circulated copy at half-price. Each assumes that a savings was achieved by providing access to publications as opposed to patrons buying them.

(vi) Last, other savings refers to atypical ways that your library saved money. While difficult to quantify, Appendix A found that self-reported transportation library usage results in: saved money (67%), improved performance (78%), and the application of unique information (76%). All three are expressed as percentages of occurrence.

# APPENDICES

## Appendix B: Calculator, continued

### CALCULATOR

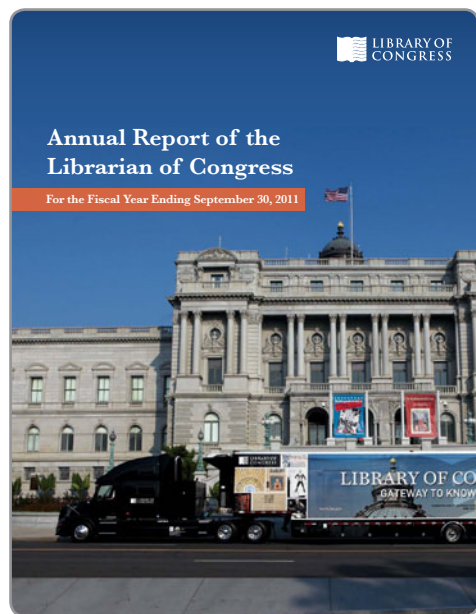
Reference Questions		Hours Saved (i)		Total Hours Saved		Hourly Salary (ii)		Reference Savings	
Number	Times	Hours	Equals	Hours	Times	Dollars	Equals	Dollars	
	[x]	9	=		[x]	\$35.37	=	\$	A
External Income (iii)		Interlibrary-Loans		Estimated Value (iv)		Inter-Library Loan Savings			
Dollars		Number	Times	Dollars	Equals	Dollars			
	B		[x]	\$40.00	=	\$			C
Items Circulated		Estimated Value (v)		Circulation Savings		Other Documentable Savings (vi)			
Number	Times	Dollars	Equals	Dollars		Dollars			
	[x]	\$20.00	=	\$		D	\$		E
Add Lines: A, B, C, D, and E				Total Savings			\$		
Divide by Costs				Total Costs			\$		
				Return-On-Investment					

## APPENDIX C: DELIVERY METHODS

## OPTIONS

As noted, it's possible to make your case in a variety of formats. Some approaches include: annual reports, briefs, metric dashboards, and video clips. The options presented in this section are not all-encompassing. Rather, they are intended to provide you with an idea of what others have done.

## ANNUAL REPORTS:

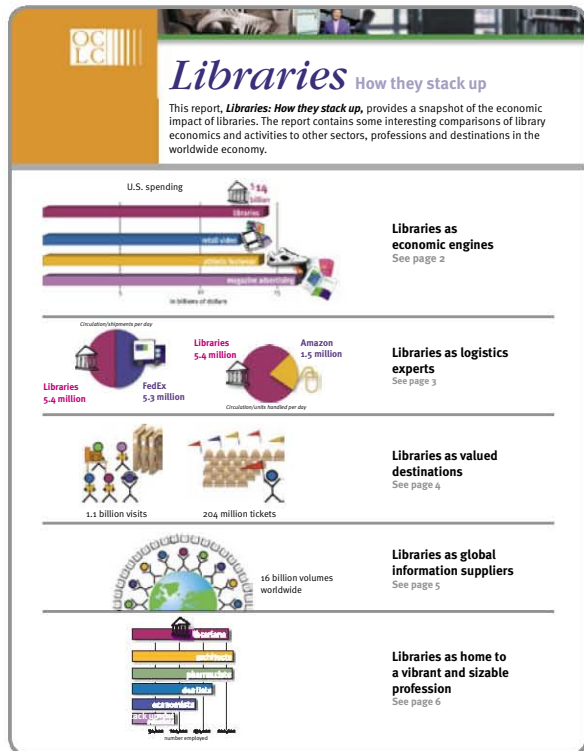


Annual Report of the Librarian of Congress for the Fiscal Year Ending September 30, 2011. U.S. Library of Congress, 2012.  
<http://www.loc.gov/about/reports/annualreports/fy2011.pdf>. Accessed October 1, 2012.

# APPENDICES

## Appendix C: Delivery Methods, continued

### BRIEFS:



Libraries: How They Stack Up. Online Computer Library Center, Inc., 2003.  
<http://www5.oclc.org/downloads/community/librariesstackup.pdf>.  
 Accessed May 22, 2012.

### CALCULATOR:

**Library Use Value Calculator**  
 Updated figures, Feb. 2011

**What is your library worth to you?**  
 How much would you pay out-of-pocket for your library services?

- Enter in the left hand column the number of times per month you or your family use each service.
- Estimated retail value of each service (if purchased) will be calculated on the right.
- Total value of your library use is shown at the bottom of the worksheet.
- Tip: Use between entries and do not use commas.

**Value of Library Services**

Input Your Use	Library Services	Value of Services
	Books Borrowed	\$ 0.00
	Paperback Borrowed	\$ 0.00
	Children Books Borrowed	\$ 0.00
	Audiobooks Borrowed	\$ 0.00
	Interlibrary Loan Requests	\$ 0.00
	eBooks/Audiobooks Downloaded	\$ 0.00
	Magazines Borrowed	\$ 0.00
	Movies Borrowed	\$ 0.00
	CDs Borrowed	\$ 0.00
	Museum Passes Borrowed	\$ 0.00
	Magazine/Newspaper Use in Library	\$ 0.00
	Meeting Room Use per Hour	\$ 0.00
	Auditorium Use per Hour	\$ 0.00
	Adult Programs and Classes Attended	\$ 0.00
	Children's Programs Attended	\$ 0.00
	Computer Use per hour (e-mail, Internet, MS Word, etc.)	\$ 0.00
	Reference Questions Asked	\$ 0.00
Calculate the Value of Your Library Use		\$ 0.00

The calculator worksheet has been adapted from original downloadable spreadsheet by the [Massachusetts Library Association](#) and then adapted for the web by [Digitized Public Library](#). Maine State Library added extra accessibility coding and reformating for ease of reading online. This spreadsheet requires either Microsoft Excel or the [Excel Viewer](#). None of the calculator graphics is restricted since MSLS has permission only for their site.

**For more information**

- How These Values were Calculated
- How to Calculate and Use the Yearly Total Library Worth Site
- How to Calculate the Return on Investment (ROI)
- Feel free to link to this calculator for patrons where ever your library is or use yourself with acknowledgment as we did.

**Comments**

We'd love to hear what value you derived off

- If Maine State Library is your local library, please use our [feedback](#) form.
- A different library? [Email us](#) or [write](#) to send a message.

Library Use Value Calculator. Maine State Library.  
<http://www.maine.gov/msl/services/calculator.htm>.  
 Accessed May 22, 2012.

## Appendix C: Delivery Methods, continued

## DASHBOARD:

## Number of library items circulated

**Results Driver:** Bill Stone, Research Administrator**Measurement Driver:** AJ Million, Transportation Librarian**Purpose of the Measure:**

This measure tracks the movement of library items at MoDOT. This includes both checkouts and information provided through literature searches. Data comprehensively demonstrates the level to which MoDOT's Transportation Library and its librarian are being utilized.

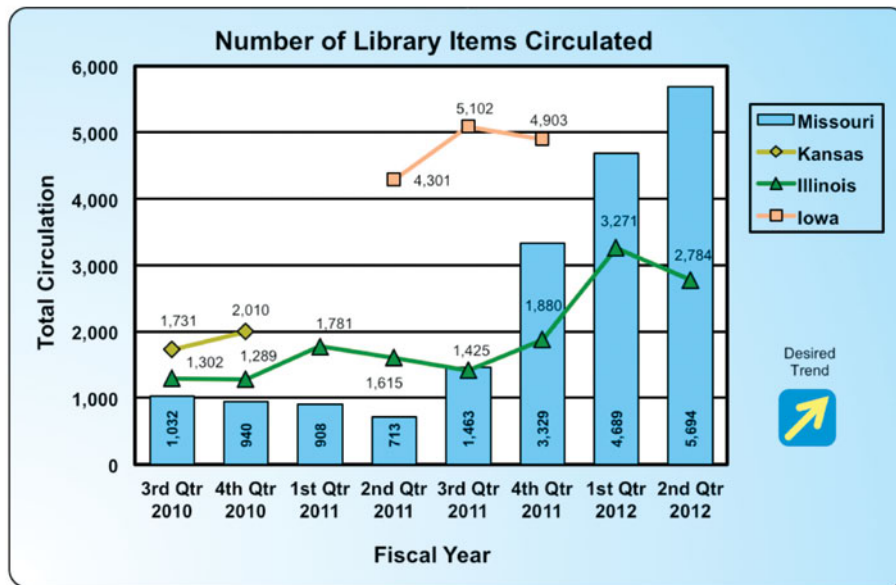
**Measurement and Data Collection:**

This measure counts documents, specific datasets, links to material located online, items from the MoDOT Library or its partners, and other resources acquired through the library which provide value added information. Data is gathered using statistics from the library's circulation recording process and the

Millennium integrated library system. Information is recorded according to standards agreed upon by the Midwest Transportation Knowledge Network. This is a quarterly measure with data collection beginning in April 2009.

**Improvement Status:**

Figures indicate that circulation continued to increase this quarter. The increase can be attributed to the same cause as the last two quarters – the creation of a secondary service in conjunction with Community Relations. MoDOT publications were posted to the social media website Scribd. A link to Scribd was added to the MoDOT social media page. The material posted increased circulation by over 1,000 items.



# APPENDICES

Appendix C: Delivery Methods, continued

## VIDEO:



Doctorow, C. Award-winning Book-Burning Hoax Saves Troy, MI, Libraries. BoingBoing.net. <http://boingboing.net/2012/06/16/award-winning-book-burning-hoa.html>. Accessed October 1, 2012.



# LIBRARY CONNECTIVITY AND DEVELOPMENT HIGHLIGHTS

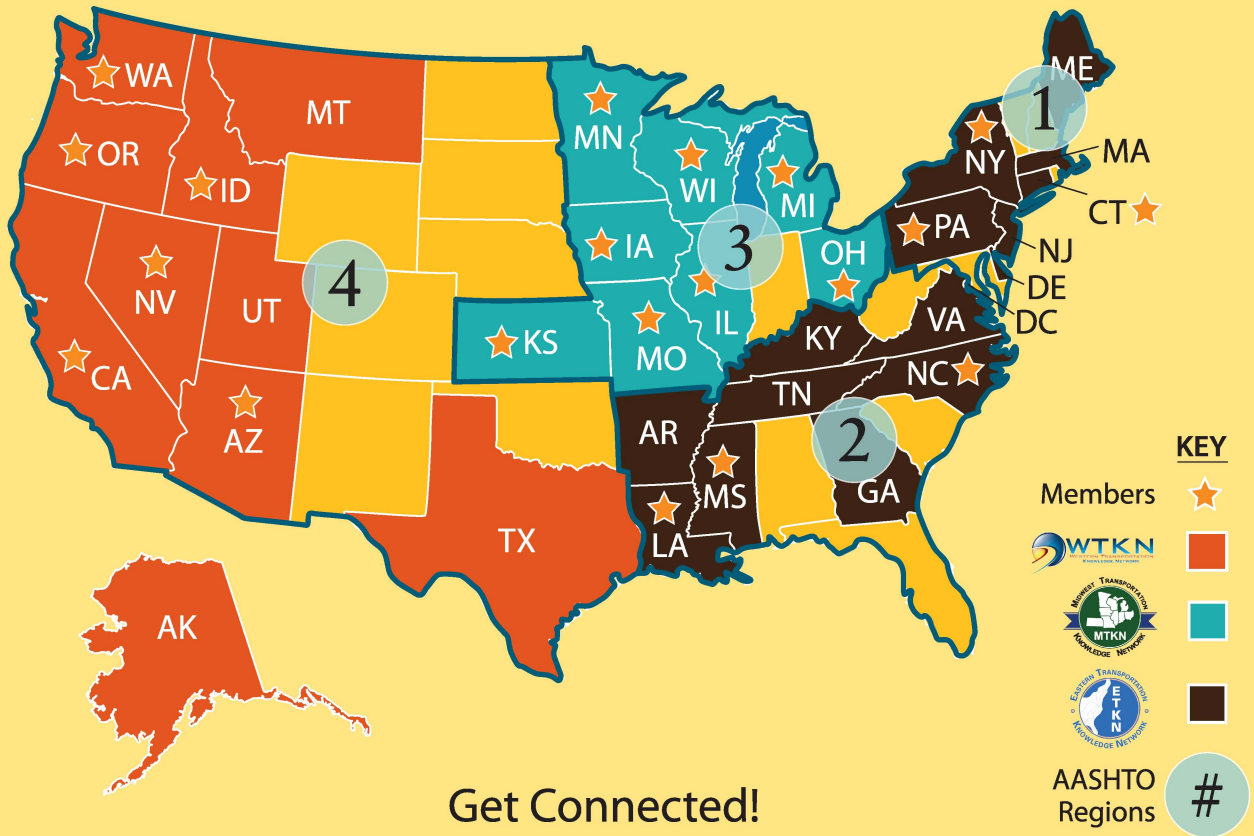


*Top row:* Midwest breakout session, National Transportation Knowledge Network First Annual Meeting, Washington DC, June 2009. *Center row, left:* NTKN Meeting, June 2009. *Center row, right:* Transportation Library Connectivity Pooled Fund Annual Meeting, Baton Rouge, LA, September 2008. *Bottom row:* Transportation Library Connectivity Pooled Fund Annual Meeting, Baton Rouge, LA, September 2008.



# Transportation Library Connectivity

Pooled Fund Study – TPF-5(237)



**For more information, please contact us!**

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[libraryconnectivity.org](http://libraryconnectivity.org)