Instructors

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By the end of the day you will be able to...

- Translate larger institutional goals into library goals and outcomes to understand the library’s value [Know the vision]

- Utilize tools for a needs assessment [Understand the environment]

- Develop a plan to provide and evaluate programs and services that demonstrate library value [Get ready to advocate & Evaluation planning]
By the end of the day you will be able to…

- Identify the tools and methods used for data collection and analysis [Make sense of the data]
- Communicate evaluation results [Communicate the value]
Demonstrating the library’s value
Trend: As costs rise and budgets fall, hospital administrators question the value of every unit.
Your Turn

Why do you think libraries need to demonstrate value?
Here is one hospital administrator’s perspective

• You are either generating revenue, or supporting those who do
  OR...

• You are helping to control operating expenses or supporting those who do
  OR ...

• You are creating expenses that add recognized value
  OR...

• You are creating expenses that must be controlled or eliminated to reduce overhead
Means, not ends

“Libraries are not ends in themselves, and they should not be supported because they have intrinsic value.”

Why demonstrate value?

Emergence of library advocacy to:

• Show the impact of the library on the larger organization’s mission and goals
• Show accountability for your resources
• Demonstrate that the library provides value-added services that contribute to the bottom line
IRS mandate for community benefit

- New reporting requirement claimed by nonprofit hospitals

- Programs must meet at least one of these criteria:
  - Improve access to health care services
  - Enhance the health of the community
  - Advance health care knowledge
  - Reduce the federal government’s financial responsibility for health care
Library service is value-added

- **Cost savings**
  - Institutional & Personal

- **Time savings**
  - Travel, discovery, skills acquisition, opportunity for other uses of time

- **Access**
  - Opportunity to use/apply information

- **Impact on clinical, research, safety, practice**
You need to become skilled at using basic evaluation to help you prove your library’s value.

- Online journals
- Research Support
- Patient Education
- Inter-library Loan
- Professional Development for staff
How & what to evaluate

- What to evaluate depends on:
  - What you need or want to know
  - Identifying what is important to your users
  - Identifying what is important to stakeholders

- Use “smallball” evaluation
  - Base hits or home runs?
Know the vision
Know the vision

- Align the library’s mission, vision & goals with the organization’s mission, vision & goals

- The library’s value = library’s contribution to achieving the organization’s mission & goals
Your goal is to show your organization that you are invaluable to its mission and goals.
How libraries add value

<table>
<thead>
<tr>
<th>Mission Concept</th>
<th>Organization Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clinical care</td>
<td>Provide excellent clinical care</td>
</tr>
<tr>
<td>Education</td>
<td>Provide services, resources needed for teaching and learning</td>
</tr>
<tr>
<td>Management of operations</td>
<td>Reduce corporate risk; increase profitability</td>
</tr>
<tr>
<td>Service</td>
<td>Improve the lives of patients and their families</td>
</tr>
</tbody>
</table>

Understand the Environment
Needs Assessment
Needs Assessment

Why conduct a needs assessment?

• Understand needs, desires and problems in context

• Validate assumptions about your contributions and services

• Provide a baseline for future evaluation

• Help to develop the blueprint to plan and evaluate your contributions and services
Components of environment

- The organization
- Your library
- Clients/users
- Stakeholders
- The community
## Assessing the environment

<table>
<thead>
<tr>
<th>Existing Data</th>
<th>Informal Methods</th>
<th>Formal Methods</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Usage statistics</td>
<td>• Observation</td>
<td>• Interviews</td>
</tr>
<tr>
<td>• Web statistics</td>
<td>• Stakeholder discussions</td>
<td>• Focus groups</td>
</tr>
<tr>
<td>• Records (i.e., training attendance)</td>
<td>• Unsolicited feedback</td>
<td>• Structured observations</td>
</tr>
<tr>
<td>• Budget information</td>
<td>• Talk to clinicians</td>
<td>• Surveys</td>
</tr>
<tr>
<td>Needs Assessment</td>
<td>SWOT analysis</td>
<td></td>
</tr>
<tr>
<td>------------------</td>
<td>---------------</td>
<td></td>
</tr>
<tr>
<td><strong>Strengths</strong></td>
<td><strong>Weaknesses</strong></td>
<td></td>
</tr>
<tr>
<td>Internal</td>
<td>Internal</td>
<td></td>
</tr>
<tr>
<td><strong>Opportunities</strong></td>
<td><strong>Threats</strong></td>
<td></td>
</tr>
<tr>
<td>External</td>
<td>External</td>
<td></td>
</tr>
</tbody>
</table>
YOUR TURN

SWOT Exercise
Get Ready to Advocate
Where to go & how to get there

Goals
Outcomes
Activities and outputs
Resources
Goals

- Statement(s) of purpose – why we do what we do and for whom

- Examples:
  - Patients and their families will have improved health information literacy
  - Staff will have access to information for timely clinical decision-making
  - Acquisition of library materials will be cost effective
Choose a program goal *strategically*

- Does it support the mission or goals of the organization?
- Does it build on information gained in your SWOT analysis?
- Do you have other assessment information to support the need for the program?
<table>
<thead>
<tr>
<th>Institution</th>
<th>Library</th>
</tr>
</thead>
<tbody>
<tr>
<td>❑ Offer … compassionate exemplary care, with a specific commitment to treating complex cases</td>
<td>❑ Provide access to knowledge based health care information</td>
</tr>
<tr>
<td>❑ Extend the limits of health knowledge through research and integrate this new knowledge to our clinical and teaching practices</td>
<td>❑ Committed to knowledge-based health care practice and life-long learning</td>
</tr>
<tr>
<td>❑ Assess and develop new technologies and procedures to prevent, assess and manage medical conditions</td>
<td>❑ Use the best of traditional and innovative technologies to facilitate information transfer</td>
</tr>
</tbody>
</table>
A logic model is a planning tool connecting activities to outcomes.

Logic Model

Resources: If we get these resources...
Activities/Outputs: Conduct these activities, deliver these products, reach these people
Outcomes: We will accomplish these outcomes
A Logic Model

Goal:

<table>
<thead>
<tr>
<th>Resources</th>
<th>Activities</th>
<th>Outputs</th>
<th>Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Work backward to activities, outputs, and resources

<table>
<thead>
<tr>
<th>Resources</th>
<th>Activities</th>
<th>Outputs</th>
<th>Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1.png" alt="Image of flour and rolling pin" /></td>
<td><img src="image2.png" alt="Image of person carrying groceries" /></td>
<td><img src="image3.png" alt="Image of cake" /></td>
<td><img src="image4.png" alt="Image of the word YUM" /></td>
</tr>
</tbody>
</table>

- **Resources**: Flour, rolling pin
- **Activities**: Shopping for groceries
- **Outputs**: Baked goods
- **Outcomes**: YUM!
When planning your program, begin with the end in mind.

Plan backward:

- Resources
- Activities/Outputs
- Outcomes

Implement forward:
The logic model

- Helps organize your thoughts – both before and during a project/program
- Provides a framework for planning and evaluating programs
- Clarifies intended outcomes
- Acts as a communication tool
- Good source for more information:

  W.K. Kellogg Foundation Logic Model Development Guide (see class bibliography for link)
The model may change over time

- Resources
- Activities
- Outcomes
- Outputs
YOUR TURN

Logic Model Exercise
## Logic model worksheet

**Goal:**

<table>
<thead>
<tr>
<th>Resources</th>
<th>Activities</th>
<th>Outputs</th>
<th>Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Logic model group activity

☐ Choose a goal (or use one of your own)
  ■ Promote user self-sufficiency
  ■ Provide physical and virtual learning environments
  ■ Improve patients’ and families’ health information literacy
  ■ Provide information to staff for timely clinical decision-making

☐ Identify outcomes, then activities, outputs, and resources
Lunch time!
YOUR TURN

Logic Model Discussion
Create a Plan
Evaluation Planning
Evaluation plan

Purpose: To demonstrate that you have achieved your outcomes

Tips:
- Build your evaluation plan from your logic model
- Consider your audience
- Use credible measures
- Use what you are already collecting
Evaluation plan

Example

Stated Outcome:

- Clinicians will report using health information in a clinical setting

- Evaluation plan: A follow-up questionnaire to training participants asking if they have used the resources since their class
Evaluation plan – key components

- Indicators
  - Achieved from outcomes

- Target
  - Specified from indicator

- Data
  - Methods for data collection
  - Analysis of data
  - Frequency of data collection
<table>
<thead>
<tr>
<th>Outcome</th>
<th>Indicator</th>
<th>Target</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved searching skills</td>
<td>Higher test scores from pre- to post-training</td>
<td>85% of students will show improved test scores</td>
</tr>
<tr>
<td>Cost-benefit of services</td>
<td>Cost comparison of your services to alternatives</td>
<td>Library acquires resources at a 50% savings over alternative</td>
</tr>
</tbody>
</table>
Evaluation plan

Indicators

Take Home Messages about Indicators

• All indicators are imperfect
• Accuracy, in part, is in the eye of the beholder
• Accuracy (and credibility) are more important when the stakes are high
## Take Home Messages about Targets

- Be realistic when writing targets
- Should be valuable to you and stakeholders
- Be sure stakeholders agree targets are adequate
Evaluation plan:
Data sources for evaluation

- Existing records and statistics
- Observation
- User and stakeholder input
- Survey results
  - Formal
  - Informal
- The literature
- Specialist or expert input
Evaluation plan:  
Methods for data collection

- Attitudes and beliefs: surveys, interviews, focus groups
- Behavior: surveys (self-reported behavior), interviews, focus groups, observation
- Knowledge: written or oral tests
- Skills: observations, hands-on tests
- Savings: statistics (output, use, financial)
Evaluation plan:
Methods for data collection

Tips for data collection:

☐ Choose your method
☐ Consider quantitative & qualitative data
☐ Get expert assistance
☐ Pilot your methods (collect and analyze)
☐ Collection frequency
**Evaluation plan**

**Outcome** (from logic model): Clinicians will report improved skills in accessing health information resources after training sessions

<table>
<thead>
<tr>
<th>Activity</th>
<th>Indicator</th>
<th>Target</th>
<th>Data Source</th>
<th>Data Collection Frequency</th>
<th>Data Analysis Methods</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is done to achieve the outcome</td>
<td>Measurable result of activity</td>
<td>Specific indicator measurement desired</td>
<td>Origin of indicator measurements</td>
<td>Date, time and intervals</td>
<td>Organize, examine, learn from the data</td>
</tr>
<tr>
<td>Provide search skills training</td>
<td>Clinicians report using resources after training</td>
<td>After training 80% of clinicians report their searching was better</td>
<td>Clinicians (Pre- and post-session questionnaire)</td>
<td>Collected twice: before and after training sessions</td>
<td>Compare pre- and post-training self-reports of use; spreadsheets</td>
</tr>
</tbody>
</table>
YOUR TURN

Evaluation Plan Exercise
Evaluation plan worksheet

**Outcome:**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Indicator</th>
<th>Target</th>
<th>Data Source</th>
<th>Data Collection Frequency</th>
<th>Data Analysis Methods</th>
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</tr>
</tbody>
</table>
Evaluation plan

Exercise

- From your logic model select an outcome and describe:
  - An activity that will help achieve the outcome
  - Indicators of outcome results
  - Targets for indicators
  - Data source
  - Data collection frequency
  - Data analysis methods
Making sense of the data
Data analysis

• Think about data analysis before collecting the data

• Identify experts that can help with data analysis

• Test your collection and analysis tools

• Leave enough time

• Go “smallball” if needed
Your statistics

☐ What do you collect, and what do you do with them?

☐ Operational metrics (measures needed for daily library management activities)

☐ Strategic metrics (measures that show the library’s value to the organization)

Some analysis tools

- **Benchmarking**
  - How you compare to others of similar size and circumstance
  - A common measuring stick to evaluate process performance

- **Cost/Benefit Analysis**
  - Use to evaluate the benefits of a program or service

- **Return on Investment**
  - How much your investment in the program or project earned for the company

- **Calculators**
  - Use to illustrate the retail value of your resources and services
## Benchmarking

### Career Home Runs

<table>
<thead>
<tr>
<th>Player</th>
<th>Final Game</th>
<th>Home Runs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Babe Ruth</td>
<td>1935</td>
<td>714</td>
</tr>
<tr>
<td>Hank Aaron</td>
<td>1976</td>
<td>755</td>
</tr>
<tr>
<td>Barry Bonds</td>
<td>2007</td>
<td>762</td>
</tr>
</tbody>
</table>

Credit: Library of Congress, Prints & Photographs Division, [reproduction number, LC-USZ62-98072]
Benchmarking

- Can improve your library's performance
- Can help you gain upper management support
- Can help prove the value of your library

http://www.mlahq.org/members/benchmark/
(from the MLA Benchmarking Network web page)
Benchmarking resources

- Your own library
- The competition
- Other hospitals/libraries in your system
- Other hospitals/libraries in your area
- MLA Benchmarking
- AAHSL Survey Statistics
Here are three ways to talk about the *monetary* value of your services:

**Savings**
What would your services cost elsewhere?
$400 in the stores NOW! $39.99

**Cost-benefit Analysis**
What value is received for each dollar spent on this service?

**Return on investment**
What is the percent gain for money invested?
How to rationalize a bargain

**Savings**
You pay $40 to get a $400 set of knives ($400-$40 = savings of $360)

**Cost-Benefit Analysis (CBA)**
For every dollar you spend on the knives, you get $10 worth of value: ($400/$40= $10/$1)

**Return-on-investment**
You save 900% (a 900% return on your investment):

\[
\frac{400-40}{40} = 9 \times 100\% \quad \frac{360}{40}
\]
Replacing your library

☐ What is the value of the resources and services your library provides?

☐ What would your users pay on the open market?

☐ Would your institution pay the retail costs?

☐ Would your institution pay for everyone who needs information or for select staff?
CBA: cost/benefit analysis

- The ratio showing dollar value of benefits gained for dollar value of costs
- Used to evaluate the monetary benefits of a program or service
- Benefits divided by costs gives the value realized by transaction
CBA

BENEFITS ÷ COSTS

Or

BENEFITS
COSTS
ROI: Return On Investment

- Percentage showing the return (increase in value) on dollars spent to achieve a benefit
- Amount the company’s investment in a program earned for the company
- Earnings on money spent
ROI

\[
\frac{\text{BENEFITS} - \text{COSTS}}{\text{COSTS}} \times 100
\]
This context may help interpret ROI

- ROI reflects the money realized (made or saved) by making an investment.
- ROI should be larger than the likely return on a bank account or certificate of deposit or some other investment instrument.
- Superior stock market return is 10%.
Preparing for CBA and/or ROI

☐ Select the program or service to value

☐ Identify benefits derived from program/service

☐ Identify who gets the benefit

☐ Convert the benefits to quantifiable terms (based on surveys and/or records)
CBA/ROI example #1

Subscription to online *Fictional Medical Journal* at Anytown Institution
The library spends $1600 for an institutional subscription to Fictional Medical Journal (FMJ) online.

7800 articles are viewed per year using the library’s subscription.
Assumptions

- Each user reads two articles per week
  
  (7800 articles/75 users = 104 articles per user per year)

- Without a library, users who needed an article published in FMJ would have to buy them for $35/article

- 75 users might each spend $3,640!

- An individual subscription is just $99
Summary: benefit/cost ratio

- Cost: $1,600 spent on FMJ

- Benefit to the users: $7,425
  (Money not spent for 75 subscriptions at $99/subscription)

- There is $4.64 in benefit to users for every $1 spent by the library ($7,425 ÷ $1,600)
Summary: return on investment

- **Cost:** $1,600 spent on FMJ

- **Benefit to the users:** $7,425
  Money not spent for 75 subscriptions at $99/subscription

- There is a **364%** return-on-investment
  \[
  \frac{(7425 - 1600)}{1600} \times 100
  \]
A CBA/ROI example #2

Document delivery service
(Interlibrary loan, or ILL)
ILL data

☐ Costs for ILL - $20
  ■ Librarian’s time ($20/hr x .25 = $5)
  ■ Fee charged by lending library - $15

☐ Benefits - $55
  ■ Patron’s time ($60/hour x .3 = $20)
  ■ Pay per view fee ($35)
Summary: benefit/cost ratio

- Benefit to the users: $55
- Cost: $20 per document delivery
- There is $2.75 in benefits to users for every $1 spent by the library ($55 ÷ $20)
Summary: return on investment

- Benefit to the users: $55
- Cost: $20 per document delivery
- There is a 175% return-on-investment
  \[
  \frac{(55-20)}{20} \times 100 = 175
  \]
Calculators that do the math for you

- Retail value calculator

- CBA/ROI calculator for books and journals

- CBA/ROI calculator for databases
Retail Value Calculator

Your institution realizes a benefit of $ for every one dollar budgeted.

Where is your library?

What type of library is it?

Library Annual Budget - you must enter your library's annual budget without commas

Number of months of stats you are using:

<table>
<thead>
<tr>
<th>Number of Uses</th>
<th>Library Resources or Services</th>
<th>Cost of Resource or Service</th>
<th>Value of Resources or Services</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Print and e-Books used (in house, checked out or online)</td>
<td>125</td>
<td>$ 0.00</td>
</tr>
<tr>
<td></td>
<td>Print journals used (in house or checked out)</td>
<td>35</td>
<td>$ 0.00</td>
</tr>
<tr>
<td></td>
<td>E-Journal articles accessed</td>
<td>35</td>
<td>$ 0.00</td>
</tr>
<tr>
<td></td>
<td>Document Delivery (Items borrowed for/delivered to users)</td>
<td>18</td>
<td>$ 0.00</td>
</tr>
<tr>
<td></td>
<td>Reference questions Answered</td>
<td>45</td>
<td>$ 0.00</td>
</tr>
<tr>
<td></td>
<td>Mediated searches</td>
<td>75</td>
<td>$ 0.00</td>
</tr>
<tr>
<td></td>
<td>Class hours taught (Sum of students/class x hours/class)</td>
<td>30</td>
<td>$ 0.00</td>
</tr>
<tr>
<td></td>
<td>AVs used or borrowed</td>
<td>150</td>
<td>$ 0.00</td>
</tr>
<tr>
<td></td>
<td>Self service photocopies</td>
<td>.10</td>
<td>$ 0.00</td>
</tr>
<tr>
<td></td>
<td>Meeting room use</td>
<td>50</td>
<td>$ 0.00</td>
</tr>
<tr>
<td></td>
<td>Hours of computer use (i.e. Internet, MS Word, etc.)</td>
<td>12</td>
<td>$ 0.00</td>
</tr>
<tr>
<td></td>
<td>Add another service or resource</td>
<td></td>
<td>$ 0.00</td>
</tr>
<tr>
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<tr>
<td></td>
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<td></td>
<td>$ 0.00</td>
</tr>
</tbody>
</table>

$ 0.00
Calculator data points

☐ Where do the values come from?

☐ What does each line mean?

http://nnlm.gov/mcr/evaluation/valuation.html
### Value of Library Resources and Services

Your institution realizes a benefit of $12.10 for every one dollar budgeted.

**Where is your library?** Missouri

**What type of library is it?** Academic

Library Annual Budget - you **must** enter your library’s annual budget without commas

**Number of months of stats you are using:**

<table>
<thead>
<tr>
<th>Number of Uses</th>
<th>Library Resources or Services</th>
<th>Cost of Resource or Service</th>
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</thead>
<tbody>
<tr>
<td>35224</td>
<td><strong>Print and e-Books used</strong> (in house, checked out or online)</td>
<td>125</td>
<td>$4403000.00</td>
</tr>
<tr>
<td>22268</td>
<td><strong>Print journals used</strong> (in house or checked out)</td>
<td>35</td>
<td>$779380.00</td>
</tr>
<tr>
<td>1762613</td>
<td><strong>E-Journal articles</strong> accessed</td>
<td>35</td>
<td>$61691455.00</td>
</tr>
<tr>
<td>1525</td>
<td><strong>Document Delivery</strong> (Items borrowed for/delivered to users)</td>
<td>18</td>
<td>$27450.00</td>
</tr>
<tr>
<td>17425</td>
<td><strong>Reference questions</strong> Answered</td>
<td>45</td>
<td>$784125.00</td>
</tr>
<tr>
<td>1380</td>
<td><strong>Mediated searches</strong></td>
<td>75</td>
<td>$0.00</td>
</tr>
<tr>
<td>96124</td>
<td><strong>Class hours taught</strong> (# students x total class hours)</td>
<td>30</td>
<td>$41400.00</td>
</tr>
<tr>
<td></td>
<td><strong>AVs used</strong> or borrowed</td>
<td>150</td>
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</tr>
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</table>

**Total Value:** $67736422.40
**Value of Library Resources and Services**

Your institution realizes a benefit of $4.71 for every one dollar budgeted.

Where is your library? [Missouri]

What type of library is it? [Academic]

Library Annual Budget - you *must* enter your library's annual budget without commas

Number of months of stats you are using: [12]

<table>
<thead>
<tr>
<th>Number of Uses</th>
<th>Library Resources or Services</th>
<th>Cost of Resource or Service</th>
<th>Value of Resources or Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>27550</td>
<td>Print and e-Books used (in house, checked out or online)</td>
<td>125</td>
<td>$3,443,750.00</td>
</tr>
<tr>
<td>2427</td>
<td>Print journals used (in house or checked out)</td>
<td>35</td>
<td>$849,450.00</td>
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<tr>
<td>168264</td>
<td>E-Journal articles accessed</td>
<td>35</td>
<td>$5,889,240.00</td>
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<tr>
<td>12739</td>
<td>Document Delivery (Items borrowed for/delivered to users)</td>
<td>18</td>
<td>$2,293,020.00</td>
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<tr>
<td>9250</td>
<td>Reference questions Answered</td>
<td>45</td>
<td>$4,162,500.00</td>
</tr>
<tr>
<td>2532</td>
<td>Mediated searches</td>
<td>75</td>
<td>$1,899,000.00</td>
</tr>
<tr>
<td>1158</td>
<td>Class hours taught (Sum of students/class x hours/class)</td>
<td>30</td>
<td>$3,474,000.00</td>
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<tr>
<td>6</td>
<td>AVs used or borrowed</td>
<td>150</td>
<td>$900.00</td>
</tr>
<tr>
<td>332703</td>
<td>Self service photocopies</td>
<td>0.10</td>
<td>$33,270.30</td>
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<tr>
<td>738</td>
<td>Meeting room use</td>
<td>50</td>
<td>$3,690,000.00</td>
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<tr>
<td>26780</td>
<td>Hours of computer use (i.e. Internet, MS Word, etc.)</td>
<td>12</td>
<td>$3,213,600.00</td>
</tr>
<tr>
<td></td>
<td>Add another service or resource</td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td>Add another service or resource</td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td>Add another service or resource</td>
<td></td>
<td>$0.00</td>
</tr>
</tbody>
</table>

$10,680,557.30
Value of Library Resources and Services

Your institution realizes a benefit of $2.32 for every one dollar budgeted.

Where is your library? Kansas
What type of library is it? Hospital - 201 - 500 staffed beds

Library Annual Budget - you must enter your library's annual budget without commas
Number of months of stats you are using: 100000

<table>
<thead>
<tr>
<th>Number of Uses</th>
<th>Library Resources or Services</th>
<th>Cost of Resource or Service</th>
<th>Value of Resources or Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>50</td>
<td>Print and e-Books used (in house, checked out or online)</td>
<td>125</td>
<td>$6250.00</td>
</tr>
<tr>
<td>1442</td>
<td>Print journals used (in house or checked out)</td>
<td>35</td>
<td>$50470.00</td>
</tr>
<tr>
<td>2649</td>
<td>E-Journal articles accessed</td>
<td>35</td>
<td>$92715.00</td>
</tr>
<tr>
<td>747</td>
<td>Document Delivery (Items borrowed for/delivered to users)</td>
<td>18</td>
<td>$13446.00</td>
</tr>
<tr>
<td>20</td>
<td>Reference questions Answered</td>
<td>45</td>
<td>$900.00</td>
</tr>
<tr>
<td>635</td>
<td>Mediated searches</td>
<td>75</td>
<td>$47625.00</td>
</tr>
<tr>
<td>15</td>
<td>Class hours taught (#students x total class hours)</td>
<td>30</td>
<td>$450.00</td>
</tr>
<tr>
<td>58</td>
<td>AVs used or borrowed</td>
<td>150</td>
<td>$8700.00</td>
</tr>
<tr>
<td></td>
<td>Self service photocopies</td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td>Meeting room use</td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td>Hours of computer use (i.e. Internet, MS Word, etc.)</td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td>328</td>
<td>Internet article printouts</td>
<td>35</td>
<td>$11480.00</td>
</tr>
<tr>
<td></td>
<td>Add another service or resource</td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td>Add another service or resource</td>
<td></td>
<td>$0.00</td>
</tr>
</tbody>
</table>

$232036.00
# ROI of Book and Journal Collections

<table>
<thead>
<tr>
<th>Salary Information:</th>
<th>User’s Average Annual Salary</th>
<th>$60000</th>
<th>Hours Worked Per Year</th>
<th>2080</th>
<th>Library Salary Budget</th>
<th>$45000</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Benefits</th>
<th>Costs</th>
<th>TOTAL Benefit</th>
<th>TOTAL Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Books</strong> used (in house or borrowed)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number borrowed or used</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average retail cost of a book</td>
<td>$0</td>
<td>Book budget</td>
<td>$0</td>
</tr>
<tr>
<td>User time saved for each book borrowed (in 10ths of an hr)</td>
<td>0</td>
<td>Portion of all staff time devoted to the book collection (order, receive, catalog, process, shelve, etc.) in 10ths</td>
<td>0</td>
</tr>
<tr>
<td><strong>Journals</strong> used (in house or borrowed)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number articles read by all users</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Per article price from a vendor</td>
<td>$0</td>
<td>Journal budget (print and electronic)</td>
<td>$0</td>
</tr>
<tr>
<td>User time saved per article available through library (in 10ths of an hr)</td>
<td>0</td>
<td>Portion of all staff time devoted to journal collection (order, license, receive, process, manage, shelve, etc.) in 10ths</td>
<td>0</td>
</tr>
</tbody>
</table>

**Clear Form**

Total Benefits Value: 0.00  
Total Costs: 0.00

Benefit/Cost Ratio: 0.00  
ROI %: 0.00
<table>
<thead>
<tr>
<th>Benefits</th>
<th>Costs</th>
<th>TOTAL Benefit</th>
<th>TOTAL Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Books</strong> used (in house or borrowed)</td>
<td></td>
<td>$3774901.00</td>
<td>$113714.00</td>
</tr>
<tr>
<td>Number borrowed or used</td>
<td>27550</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average retail cost of a book</td>
<td>$125</td>
<td>Book budget</td>
<td>$113714</td>
</tr>
<tr>
<td>User time saved for each book borrowed (in 10ths of an hr)</td>
<td>.25</td>
<td>Portion of all staff time devoted to the book collection (order, receive, catalog, process, shelve, etc) in 10ths</td>
<td>.16</td>
</tr>
<tr>
<td><strong>Journals</strong> used (in house or borrowed)</td>
<td></td>
<td>$8436231.98</td>
<td>$682215.48</td>
</tr>
<tr>
<td>Number articles read by all users</td>
<td>170691</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Per article price from a vendor</td>
<td>$35</td>
<td>Journal budget (print and electronic)</td>
<td>$606205</td>
</tr>
<tr>
<td>User time saved per article available through library (in 10ths of an hr)</td>
<td>.3</td>
<td>Portion of all staff time devoted to journal collection (order, license, receive, process, manage, shelve, etc.) in 10ths</td>
<td>.07</td>
</tr>
</tbody>
</table>

**Total Benefits Value:** 12211132.96
**Total Costs:** 795929.48

**Benefit/Cost Ratio:** 15.34
**ROI %:** 1434.20
## ROI of Databases

### Salary Information:
- **User’s Average Annual Salary**: $60000
- **User Hours Worked Per Year**: 2080
- **Library Salary Budget**: $45000

### Benefits

<table>
<thead>
<tr>
<th>Database use</th>
<th>TOTAL Benefit</th>
<th>TOTAL Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Database sessions or full text articles clicked or tables of contents retrieved or subscriptions represented (use one of these, not all!)</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Average retail cost of a single search by a broker OR of a full text article (not both)</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>User time saved for each search session or article retrieved</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

### Costs

<table>
<thead>
<tr>
<th>Library’s Cost for Database(s)</th>
<th>Portion of all staff time devoted to supporting the database</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0</td>
<td>0</td>
</tr>
</tbody>
</table>

### Total Values
- **Total Benefits Value**: 0.00
- **Total Costs** : 0.00
- **Benefit/Cost Ratio**: 0.00
- **ROI %**: 0.00
Costing tips

- Consider tangible vs. intangible benefits
- Be conservative in estimating benefits and liberal in assessing costs
- Obtain administrative approval of the value of the benefits for each alternative; involve financial staff
- Express benefits and costs in a value system shared by all parties – $$
Communicating the value
Use the results…

☐ To communicate your value; be proactive
☐ To promote and advocate for the library
☐ To maintain or get additional funding
☐ As baseline information to show improvement over time
☐ To improve services and programs
Communication methods

- Reports: formal/informal, written/oral
- Promotional materials
- Internal publications
- Staff meetings
- Web sites
- Elevator talk
Communication tips

☐ Frame message: added value to organizational mission and goals

☐ Be prepared with your message

☐ Use qualitative data ("stories") to support quantitative data

☐ Focus on benefits

☐ Avoid library jargon
What sticks?

• **SUCCESs**
  – Simple
  – Unexpected
  – Concrete
  – Credible
  – Emotional
  – Stories

Communication method: Elevator talk

- Highlight a specific accomplishment
- What your library contributes and why it matters
- Use evaluation data
- Convey a benefit to the listener
- Brief encounter – 30-45 seconds
Elevator talk

Critique this elevator talk:

I am the library director here at General Hospital. The library specializes in providing information to health care providers as well as the patients. Our library services to clinicians are widely known and utilized throughout the hospital.

Better:

Our library services to clinicians are widely known and used throughout the hospital. In fact, in the past 6 months 80% of clinicians have used the library’s services.
Elevator talk

Critique this elevator talk:

I am currently working on revising the library’s budget. We are actually saving the hospital money with our library services.

Better:

Because the library provides electronic access to many journals for clinicians, we save the hospital $10,000 annually. We used to pay for individual articles each clinician requested. Now they have easy access to the journals when they need them.
YOUR TURN

Elevator Talk Exercise
Elevator talk exercise

- Select an outcome
- Invent results
- Determine the audience
- Create a sound bite that highlights the value of the outcome to that audience
- MLA “elevator talk” video contest
Go forth & evaluate

☐ Do “smallball” evaluation

☐ Relate your value to the mission and goals of your organization

☐ Plan your evaluation before you begin

☐ Share your value with many audiences

☐ Don’t wait for a crisis – *start now!*
Thank you!

☐ For *lots* more information, see the Resources List in your handout packet, or online:

http://nnlm.gov/evaluation/workshops/measuring_your_impact/ResourcesMYI.pdf

☐ Please take a few minutes to evaluate this class by completing the MLA form.