Management Metrics That Work

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April 9, 2013
Agenda

1. Advantages of Management Reporting
2. Collecting, Storing, & Analyzing Metrics
3. Presenting & Packaging Metrics
4. Management Reporting at Our Organizations
5. Questions & Answers
Why Report to Your Management?

Reason 1
To communicate the library’s value and demonstrate return-on-investment

Reason 2
To generate support for continued or even increased staff and resources

Reason 3
To demonstrate how the library supports the organization’s mission and strategic goals

Reason 4
To demonstrate transparency and accountability in how resources are used

Reason 5
To show how library contributions have changed over time
Metrics: What Categories To Measure?

Collect This Data:
- Library Size and Patron Base
- Transactions: Circulations and Reference
- Budget, Resource Allocation, and Value of Print & Digital Materials
- Facilities and Physical Foot Traffic
- Virtual Foot Traffic
- Education and Outreach
- Operations

To Measure These Areas:
- Customer Satisfaction
- Return on Investment
- Effectiveness of Patron Outreach & Education
- Impact
- Comparability to Like Libraries
### Sample Metrics

#### Library Size and Patron Base
- Percentage of actual patrons to potential patrons
- Percentage of patrons seeking assistance in person, via e-mail, via phone, or via web
- Percentage of patrons by patron type

#### Transactions: Circulations & Reference
- Total number of checkouts per year
- Percentage of checkouts by patron type
- Percentage inbound vs. outbound ILL requests

#### Budget, Resources Allocation, & Value of Materials
- Percentage increase or decrease in overall budget over time
- Change in print vs. digital resource budget allocation over time
- Average cost per full-text article downloaded

*See handout for more examples.*
### Sample Metrics (continued)

<table>
<thead>
<tr>
<th>Facilities &amp; Physical Foot Traffic</th>
<th>Virtual Foot Traffic</th>
<th>Education &amp; Outreach</th>
<th>Operations</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Number of patrons entering library, year over year</td>
<td>• Average number of library website visits per day</td>
<td>• Number of database trainings and attendees per year</td>
<td>• Average minutes to process, catalog, and shelve an item</td>
</tr>
<tr>
<td>• Average duration of a library visit</td>
<td>• Most used pages on library website</td>
<td>• Increase in database users over time</td>
<td>• Average daily library staff time spent on core work vs. non-core work (troubleshooting computers, looking for passwords, etc.)</td>
</tr>
<tr>
<td>• Average duration of use of various physical spaces</td>
<td>• Increase in database users after database trainings</td>
<td>• Number of new library users after attending orientation</td>
<td></td>
</tr>
</tbody>
</table>

*See handout for more examples.*
## Storing Your Metrics

<table>
<thead>
<tr>
<th>Type</th>
<th>Pros</th>
<th>Cons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft Excel</td>
<td>• No cost, easy to setup</td>
<td>• Inflexible</td>
</tr>
<tr>
<td></td>
<td>• Can produce pie charts &amp; graphs</td>
<td>• Not a true database</td>
</tr>
<tr>
<td></td>
<td>• Can export to Access and create a database</td>
<td></td>
</tr>
<tr>
<td>Relational Database (in-house or cloud-based)</td>
<td>• No cost, somewhat easy to setup</td>
<td>• Steeper learning curve than Excel.</td>
</tr>
<tr>
<td></td>
<td>• Consistent data that can be searched, manipulated and reported</td>
<td>• Needs care in planning and setup</td>
</tr>
<tr>
<td></td>
<td>• Automatic calculations and reports</td>
<td>• Sometimes created for a different purpose</td>
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<tr>
<td></td>
<td>• Higher data storage capacity</td>
<td>• If in-house, needs to interact with the network on an ongoing basis.</td>
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<tr>
<td></td>
<td>• Data exportable to multiple tools</td>
<td></td>
</tr>
<tr>
<td>Virtual reference software (i.e., Altarama RefTracker, Springshare LibAnalytics)</td>
<td>• Collects &amp; analyzes data for you</td>
<td>• More expensive</td>
</tr>
<tr>
<td></td>
<td>• Reports &amp; graphics on demand</td>
<td>• Security concerns if hosted by vendor</td>
</tr>
<tr>
<td></td>
<td>• Consolidates requests from chat, email, phone &amp; SMS text</td>
<td>• Possibility of vendor going out of business</td>
</tr>
<tr>
<td></td>
<td>• Supports a searchable knowledge base</td>
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<tr>
<td></td>
<td>• Ability to tag individual metrics</td>
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</tbody>
</table>
Collecting Your Metrics

Decide what you’re trying to measure before you begin to collect metrics

Collect data proactively so you have them when needed

Collect quantitative and qualitative metrics. Collect data, stories and testimonials

Identify metrics from other libraries and organizations or industry standards that can be used to contextualize your metrics

Look to library vendor-supplied usage data as a resource

Limit the number of metrics to provide focus and to concentrate on the metrics with greatest impact
Ways To Collect Metrics Data

- Tally sheets/Forms
- Surveys/Customer Feedback/Observations
- Focus Groups/Interviews
- Benchmarking
## Interpreting Your Metrics

<table>
<thead>
<tr>
<th><strong>Take simple measures</strong></th>
<th>Number of library patrons</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Use ratios to compare two measures</strong></td>
<td>Percentage of actual patrons to potential patrons</td>
</tr>
<tr>
<td><strong>Use trends to see changes over time</strong></td>
<td>Year-over-year increase or decrease in actual patrons to potential patrons</td>
</tr>
<tr>
<td><strong>Use benchmarks to compare to like libraries</strong></td>
<td>Percentage of actual patrons to potential patrons vs. like libraries</td>
</tr>
<tr>
<td><strong>Combine benchmarks and trends to compare to like libraries over time</strong></td>
<td>Year-over-year increase or decrease in actual patrons to potential patrons vs. like libraries</td>
</tr>
</tbody>
</table>

*See handout for more examples.*
Presenting Your Metrics: Best Practices

- Report on a regular basis: weekly, monthly, quarterly or annually
- Use creative, single-use metrics to supplement your ongoing metrics program and illustrate unique points
- Tailor your reporting to different audiences (executives, your supervisor, the public, your customers)
- Compare metrics to past years, a small sample of similar libraries, or industry averages to create a frame of reference
- Use a mixture of quantitative & qualitative data; if possible, have your report tell a story with words, pictures, and numbers.
- Understand how your metrics relate to each other and be prepared to answer questions about “what it all means”
- Share metrics and reports with your staff to foster an understanding of how they contribute to the library’s success
Presenting Your Metrics: Packaging Methods

- Written Reports
- Verbal Presentations
- Dashboards
- Infographics
- Impact stories
Our Management Metrics: **USAID**

<table>
<thead>
<tr>
<th>About the USAID Library</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Official Department Name</strong></td>
</tr>
<tr>
<td><strong>What the Organization Does</strong></td>
</tr>
<tr>
<td><strong>Staff Size</strong></td>
</tr>
<tr>
<td><strong>Subject Matter</strong></td>
</tr>
<tr>
<td><strong>Our Customers</strong></td>
</tr>
<tr>
<td>Our Metrics Experience</td>
</tr>
<tr>
<td>-------------------------</td>
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</tbody>
</table>
| **How We Collect the Data** | • From our shared mailbox into SharePoint  
• At the reference desk, saved in a Google Doc  
• Customer feedback from emails into SharePoint  
• Database usage from vendors saved in Excel |
| **What Data We Collect** | • Type of request  
• Type of client (public, partner, USAID bureau or mission)  
• Customized research by sector and topic  
• Door count, circulation, PC & WiFi use  
• E-resource usage  
• Results of outreach activities (new employee orientations, office presentations, open houses) in terms of requests  
• Use examples from customers |
| **How We Interpret & Report on the Data** | • Weekly, monthly & annual reports  
• Mixture of quantitative & qualitative information  
• Trends analysis  
• How we contribute to the “USAID Forward” goals |
### About the Ex-Im Bank Library

<table>
<thead>
<tr>
<th>Official Department Name</th>
<th>The Research Library &amp; Archives</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>What the Organization Does</strong></td>
<td>It backs the financing of US exports, mainly to emerging markets.</td>
</tr>
<tr>
<td></td>
<td>Exports can be products (Boeing jets, oil rigs, nail files, candy) or services (engineering, architects)</td>
</tr>
<tr>
<td><strong>Staff Size</strong></td>
<td>400 FTE in agency; 7 staff in Research Library</td>
</tr>
<tr>
<td><strong>Subject Matter</strong></td>
<td>International Business and Economics</td>
</tr>
<tr>
<td><strong>Our Customers</strong></td>
<td>Chair &amp; Board, Economists, Bankers, Lawyers; Staff from Policy, Communications, Business Development</td>
</tr>
</tbody>
</table>
### Our Metrics Experience

<table>
<thead>
<tr>
<th>How We Collect the Data</th>
<th>What Data We Collect</th>
<th>How We Interpret &amp; Report on the Data</th>
</tr>
</thead>
</table>
| • Collected through Quickbase, a cloud-based relational database.  
• Library staff report data via dropdowns, checkboxes, and written overviews of requests (mostly copied from e-mail)  
• Anecdotal evidence collected through written and verbal follow-up | • Research, research, research:  
• Who makes requests; purpose of requests; sources used; time spent; % actual vs. potential users; highest volume users  
• To collect going forward: ROI of databases, gap analysis | • When we report: weekly reports detailing research requests; annual reports analyzing the year.  
• Annual report contains different formats of information: charts showing trends, pie charts showing concentrations, tables showing impact, and bulleted lists detailing past accomplishments & future goals. |
## Our Management Metrics: Federal Reserve Board

<table>
<thead>
<tr>
<th>About the Board Research Library</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Official Department Name</strong></td>
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<tr>
<td><strong>What the Organization Does</strong></td>
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<td><strong>Our Customers</strong></td>
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### Our Management Metrics: Federal Reserve Board

#### Our Metrics Experience

| How We Collect the Data | • Service Interaction Access Database – used to collect and generate data on customer use of library services  
| | • Ongoing metrics are supplemented by “snapshot” data demonstrating impacts. A snapshot looks at sample data to make a specific point  
| | • SharePoint site – money saved on data purchases  
| | • SurveyMonkey – just beginning to use this to get feedback from customers on projects and services  
| | • Vendor statistics |

| What Data We Collect | • Access database – customer name, division, library staff member, type of request, length of time to craft response, notes  
| | • Our favorite metrics – market penetration and percentage of repeat customers. We use repeat customers as an indication of customer satisfaction.  
| | • ROI – money saved and cost avoidance calculated for data acquisitions work. |

| How We Interpret & Report on the Data | • Annual budget presentation |
More Resources To Get Started


More Resources To Get Started

• Hiller, Steve. “What Are We Measuring, and Does it Matter?” *Information Outlook* (September 2012).


