# All Your Data Displayed in One Place
*Scoping Research for a Library Assessment Dashboard & Toolkit*

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# Library Assessment Dashboard & Toolkit

Scoping Research

January-June 2016, international, collaborative research project to:

**Assess the need for** and interest in a library assessment dashboard and toolkit

**Survey library data sources** and key library performance indicators

**Survey tools and technology** available to support the creation of a dashboard

**Scope the work** and resources required to build it

# Motivations

Solve it once, flexibly, for many

**Utilize and build upon** important assessment efforts and standards

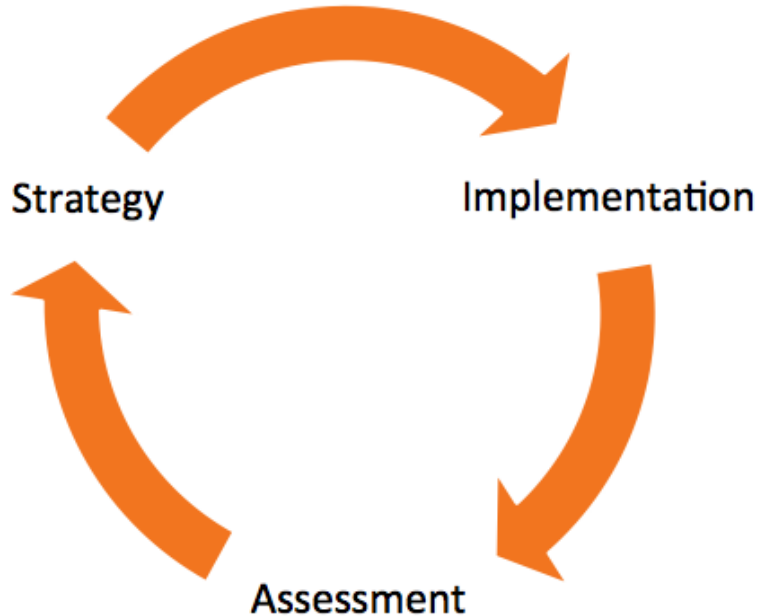**Centralize and organize views** into libraries' diverse data sources

**Support strategic thinking and data-driven decisions** within library organizations by providing a shared "big picture"

"Everything we're doing now is on a question/answer basis."

*- Assessment librarian & project interviewee*

# Motivation: Setting Goals Is Easy... But Achieving Them Isn't



65% of organizations have an agreed-upon strategy.
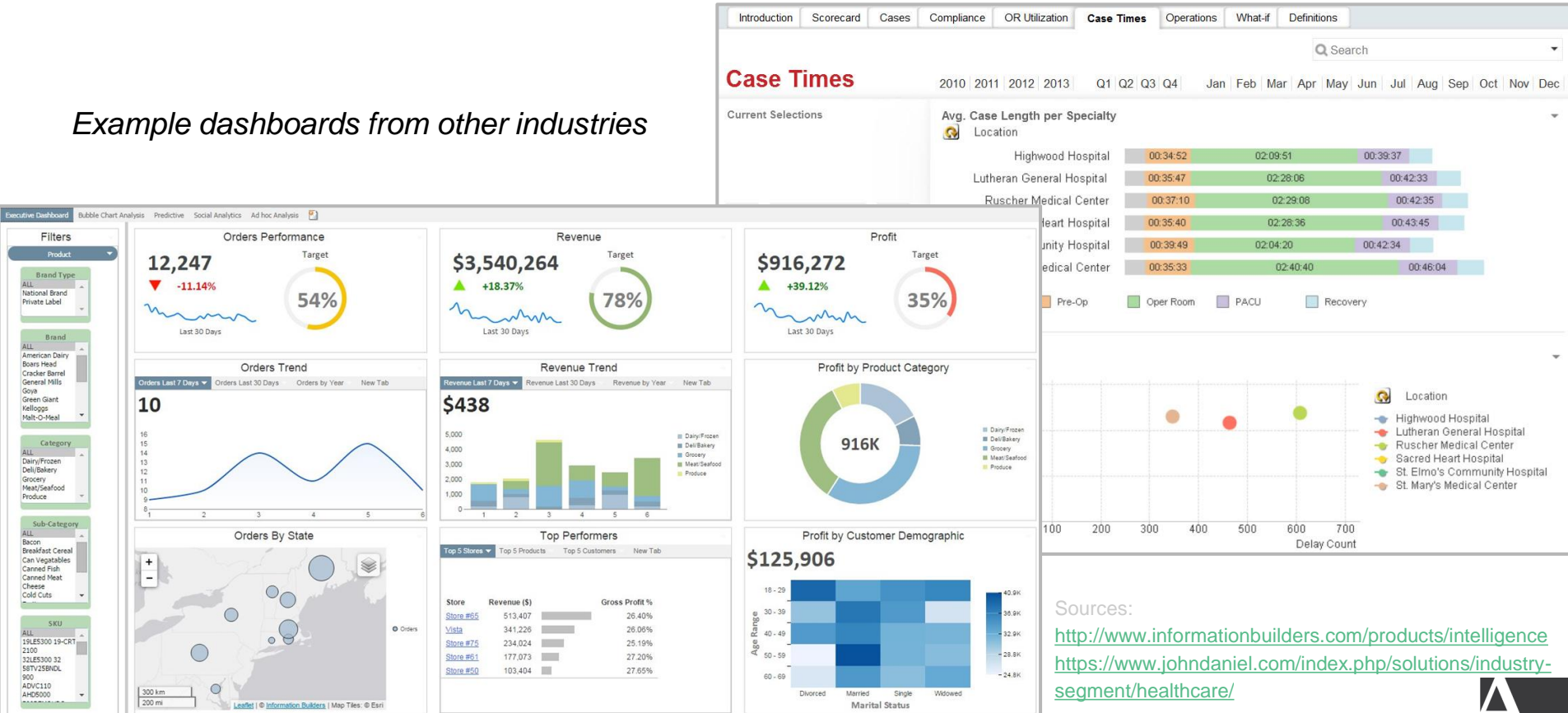
14% of employees understand the organization's strategy.

Less than 10% of all organizations successfully execute the strategy.

*(source Forbes.com)*

# Dashboards Provide a Shared Picture of Performance

*Example dashboards from other industries*



Sources:
http://www.informationbuilders.com/products/intelligence
https://www.johndaniel.com/index.php/solutions/industry-segment/healthcare/

"If it were easy,
  it would be done already!"

# Opportunity

Common needs,
Maturing standards & tools

Common Needs Across Libraries:

Data gathering and cleaning

Tools and methods

Metrics and formulae

Maturing:

Standards

Tools

Technologies

"...having the dashboard would enable us to spend *less* time getting answers to *basic* questions, and spend *more* time on the *complex, deep* questions."

*- Assessment Librarian & project interviewee*

# Scoping Research Results

& Next Steps

The Toolkit should include:

A Framework of key library performance indicators and supporting data formulas

Library data inventory and dictionary

Data normalization tools library

Customizable, web browser-based dashboard with data visualization modules for key library performance indicators

Recommendations and case studies for data warehousing solutions

A membership consortium and online community would support adoption and long-term sustainability

# Proposed Dashboard Framework (Draft)

| Service Area | Strategic Dashboard KPI Examples | Managerial Dashboard KPI Examples | Operational Dashboard KPI Examples |
|---|---|---|---|
| Users and Space | B.2.2.2 Percentage of External Users; B.2.2.3 Percentage of the Total Library Lending to External Users | B.1.3.3 Hours Open Compared to Demand; B.1.3.4 Percentage of Storage Space Which Has an Appropriate Environment | Percentage of shelf space utilized |
| Collections | Percentage of Collection in digital format | B.2.1.1 Collection Turnover; B.1.2.6 Percentage of Rare Materials Accessible via Web Catalogues; | See 'Work Rate' Service Area |
| Library Use | B.2.1.2 Loans per Capita; B.2.1.3 Percentage of Stock Not Used B.3.1.3 Cost per Download | B.2.3.1 User Places Occupancy Rate; B.2.1.4 Number of Content Units Downloaded per Capita; B.1.1.3 Percentage of Rejected Accesses; | B.2.2.5 Number of User Attendances at Training Lessons per Capita |
| Financial | B.4.3.2 Percentage of Institutional Means allocated to the Library; B.3.3.1 User Services Staff as a Percentage of Total Staff; B.3.3.3 Ratio of Acquisition Expenditures to Staff Costs | B.3.3.6 Staff Costs per Title Catalogued | B.3.1.3 Cost per Download |
| Work Rate | See 'Financial' Service Area | B.3.3.5 Employee Productivity in Lending and Delivery Services; B.4.2.1 Percentage of Library Staff Providing Electronic Services; B.4.2.4 Percentage of Staff in Cooperative Partnerships and Projects | B.1.2.1 Shelving Accuracy; B.1.2.2 Median Time of Document Retrieval from Closed Stacks; B.1.2.3 Speed of Interlibrary Lending |
| Public Engagement | Exhibition Attendance Alumni gifts | No of visitors to websites (# website sessions) | Average length of visit to webpage - dwell time |
| Satisfaction | B.2.4.2 User Satisfaction; | B.2.4.2 User Satisfaction; | B.2.4.2 User Satisfaction; |

# ISO 11620: Library Performance Indicators

Opening hours compared to demand

Availability of required titles

Percentage of rejected sessions

Ratio of requests received to requests sent out in interlibrary lending

Staff per capita

User satisfaction

Library visits per capita

Seat occupancy rate

Percentage of stock not used

Loans per capita

Percentage of loans to external users

Reference questions per capita

Ratio of acquisitions costs to staff costs

Acquisition speed

Lending speed

Interlibrary loan speed

Percentage of acquisitions expenditure spent

https://www.iso.org/obp/ui/#iso:std:iso:11620:ed-3:v1:en

# Next Steps

2016/2017

Elaborate data framework

Monitor evolution of important efforts

Establish partnerships & sponsorships

Re-visit technology landscape

Finalize project estimates

Get ready, get set...

GO!

# Thank You to Project Research Interviewees at:

Charlotte-Mecklenberg Public Library, North Carolina (US)

Duke University (US)

Harvey Mudd College (US)

Jisc (UK)

Syracuse University (US)

University of California, Davis (US)

University of Pennsylvania (US)

Wollongong University (Australia)

# Scoping Research Project Partners

**Project Team**

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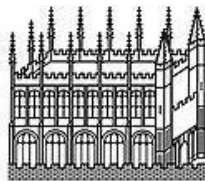
# Questions?



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