Promoting Our Values, Proving Our Worth Toolkit:
A Realistic, Concrete Approach

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Let's move beyond the past by asking the hard questions and finding answers that work today.

"Why should libraries be funded?" … Yesterday's Answers

Because we are the heart of the institution…

Because we are the fabric of the community…

Because "for the people" is the cornerstone of our democracy…

Because you've already paid for it…

Because pooling resources to support everyone is good business…

Because we said so…

Because everyone just knows we are important

None of these reasons work on the majority of decision makers anymore. Why not? Whether you're addressing leaders in your community, educational institution, or company, there's always seems to be some priority outranking you. With fewer dollars to go around, every expenditure must be justified. The days of the "fund us because we are noble" rationale are long gone.

It's not that the public or even decision makers don't appreciate us; today's tight fiscal environment is a simple byproduct of many critical areas and issues that require funding and increased scrutiny in how and why funds are spent. All special interest groups – a the library community is no exception – must struggle to select that perfect piece of data, that perfect statistic, or that perfect argument that reaches the most important decision maker who will provide the needed support.

Once we set aside the "because" statements (because the majority of them don't work anymore), we have to select new terms, processes, data, and formulae that illustrate - to that specific person – who we are, what we do, and why they should fund us.

We start by asking **Today's Questions …**

Why aren't they funding the library?

Why don't they understand us?

Why don't they value what we do?

How do we prove our worth?

Should we have to identify our strengths every year? Or every budget cycle? Or every legislative session?

Today's Answers …

Terms…processes…formula...data… What are the terms we need now?

Evidence of Impact ***Cost-benefit*** ***Cost-effectiveness*** ***Measure***

Perception of value ***Evaluate*** ***Added value*** ***Outcome***

Customer perception of value ***Information Assets*** ***Economic analysis***

Worth ***Effectiveness*** ***Economic impact*** ***Value added***

Return on Investment ***Productivity*** ***Price/Cost/Economic Value***

Why can't we get the right answers to today's questions? A checklist for self-evaluation.

Are we STILL more passive and reactive than proactive and assertive?

Are our efforts not enough?

Are our strategies not business strategies? Do we match what we have to offer based on what our public and leaders need? Do we support our governing structures' goals, products, and decision making functions? ("How attuned are you to critical business issues facing your organization? How have you focused content and service offerings to match what the rest of the organization is focused on at this time?" Sykes*)*

Do we "produce?" Do we have results?

Do we work under the radar? Or are we visible and "at the table?"

Do we measure what we do? Systematically?

Do we evaluate enough? Or at all? Do we have evidence of impact?

Do we articulate our evaluative results so that others understand? Do we disseminate them appropriately? ("Contributions of information professionals may not be perceived to be of high value if results are not measured and presented in terms that resonate within the organization." Sykes)

If you aren't 100%, do you know your (partial *and* complete) "fail points"?

Are you using public relations **and** marketing processes and techniques? Branding? Do you know your audience? Your "customer"? ***Their*** customer? Their needs and preferences? ("Consistent promotion of targeted, customized, high-value services and success stories via presentations, in promotional literature, and at appropriate spots on the corporate intranet is guaranteed to raise the visibility of information professionals." Sykes)

How do we begin demonstrating our value? Start by creating a culture of measurement and assessment into the organization. Little can be achieved without this foundation.

- Articulate the importance, role, and value of measurement, evaluation, and assessment in your organizational/institutional documents.
- Build an assessment model to mirror the governing organization's measurement, evaluation, and assessment framework. Make sure it is consistent throughout your institution and all your activities. Ensure that it meets all of your reporting and decision-making needs.
- Identify all employees' roles and responsibilities in assessment of your library's functions, programs, and services.
- Design opportunities for assessment throughout the organization. Be sure to identify short-term, long-term, and pilot opportunities.

- Encourage program assessment as well as one-time event/activity outcomes measurement. Build in assessment learning throughout training and professional development.
- Identify and nurture assessment as an expertise/employee focus.
- Create assessment teams and team leaders.
- Create incentives for assessment in general as well as rewards for assessing and correcting identified problems/data.

Figure Out What You Have and What You Need

Draft a list of what you already measure or count and assess.

For many years libraries have gathered numbers. For the last 30 years, libraries have struggled with a wide variety of types of measurement and assessment. Libraries HAVE been measuring and they HAVE been assessing.

Typical Measurements

How many items are in the library/available through the library?
How many people check out books?
How many people walk through an actual and now virtual door?
How much is spent on resources?
How many programs they offer?
How many people come to programs?
How many people use a service Reference – in person and virtual?
What is your square footage?
What are your locations – number of, variety, etc.?

Measurements and Assessments "Often Taken"

How much money they spend on programs and services
How much programs and services "cost" per constituent or use
How many items are used in-house?
What are you outputs?
What is the number and type of database uses?
What is the attendance (in person/virtually) at programs?
What are your cataloged resources (media, web, print, etc.); timelines, etc.?
What are your spacing needs (i.e., space per constituent, space use per constituent, space per department, resource area)?
What are your counts (E-entry/access/door counts, page counts)?

What are you trying to convince decision makers of?

If the very existence of the library is an open question, you'll need to have ready and compelling answers to these questions.

- Why should you exist?
- How does what you provide matter to the people you serve?
- Why is your information valuable to the organization?
- Why does what you do or what you provide save money?
- Why does what you do save clients money? Improve their (interactions with the organization, products received from the company, quality of life)?
- Why do you need the same level of funding?
- Why do you need more funding?
- Why do you need new money (in areas not designated before)?
- Why do you want to move money?
- Why do we need to buy online resources? Isn't there just as good information on the web for free?
- How did you arrive at the budget figures in your request?
- Why did you choose x over y?

Current and recommended library assessment that generates data

Current modes and methods for library assessment should include a focus on staff/expertise and identifying, gathering, and applying general library data for contrast, comparison and context, designing measurement and assessment unique to libraries, comparison existing general data with gathered data and articulating numbers of outcomes language to provide immediate value, worth content, measurement and assessment appropriate for all libraries includes:

1. Assistance (online - emails/chat, in-person - in-library, office hours, class, small group, large group, etc.)
2. Percentage of constituent populations such as target populations, grades, disciplines/curriculum supported electronically
3. Percent of budget spent on e vs. print
4. Percentage of collection available electronically
5. Number/use of print titles vs. /in relation to online subscriptions
6. Number/use of e-books (reference vs. circulating, e-reserves, fiction vs. non-fiction)
7. Number/use of/type of “other” including digital collections/repositories, stored materials, etc.
8. Resource use/assessment such as scholarly vs. popular, etc.
9. Pre and post use of resources in libraries offering instruction/orientation
10. Awareness and/or use of resources designed for patron use (wiki’s, blogs, Libguides) in general and pre and post
11. Awareness and/or use of widgets in general and pre and post information literacy
12. Awareness and/or use of gateways
13. Use of modes and methods of virtual/digital reference
14. Identification of resource and service benefits by patrons
15. Identification of resource and service benefits by patron usage
16. Benefit of online content (identified, designed, etc.) to constituent groups
17. Benefit of online venues vs. in-person venues
18. Library perception by constituent groups
19. Attitudes toward library resources
20. Knowledge(s) regarding existence and use of library resources and basic application
21. Behavior toward library and/or information use of resources
22. Use of modes and methods of assessment including quantitative, qualitative, input/output, outcomes measurement & assessment
23. Using research methodology including best and effective practices to illustrate value, benefit and worth

Specifically – both classic and contemporary processes such as:

--Needs identified
--Inputs (what you used)
--Activities and services (what you did)
--Audience (characteristics and population)
--Outputs (what you produced)
--Outcomes (what impact you achieved and how you know)
--Interpretation (what it all means, why it all matters)

Using Data Effectively

What are recommended ways to identify and use data?

Identifying Data

- What do you need to report on? Prove? Identify?
- Identify any specific data – flat or two dimensional – that you already have on your library.

- Gather general data (national, statewide, related-area, other required by your environment) on libraries that is a solid match to your type, size, or assessment need.
- Compare your data against "other" general data by categories, need.
- Compare your data against national data (e.g., see LRS.org; see AASL's *Longitudinal Study*)
- Use data in this order for best impact:

  http://www.juiceanalytics.com/writing/making-your-case-a-hierarchy-of-supporting-data/

  1. **Irrefutable data** is statistically-significant, robust data from significantly credible sources (data should be based in reality/ "reflect" reality)
  2. **Substantial data** is point-in-time data or directionally accurate data. This type of information is typically survey data on a big scale (state, regional, national) or a smaller scale (internal considered less valid).
  3. **Expert commentary:** Quotes from industry experts (agency personnel, leading vendors, peers in the field/other benchmark districts) can be considered a summary or synthesis of information.
  4. **Anecdotal data** is sometimes considered only example, storytelling, or endorsement information, it can be also data driven. What separates it from substantial is that it includes only "one or two data points or examples that support your case."
  5. **Quotes** offer comments from constituent groups, etc. that illustrate needs and uses and can serve as powerful evidence.
  6. **Your opinion** is, from the perspective of the audience, too biased to be considered supporting evidence (even though you may be the recognized expert in your district or in the field). Use this approach last.

Remember...No DULL Data!
What are clever ways of displaying data?

- ANYTHING by Edward Tufte (www.edwardtufte.com)
- Visualizing data; visualizing information Display of Statistical Data http://www.physics.csbsju.edu/stats/display.html
- Unusual charts and graphs in general, based on your environment
- NCES – Kidszone http://nces.ed.gov/nceskids/createAgraph/; http://www.graphscharts.com/; http://math.pppst.com/graphs.html; Data Guidebook for Teachers and Leaders – Depka, Eileen (Google Books); Just Plain Data Analysis - Klass, Gary http://lilt.ilstu.edu/jpda/charts/Charts.htm and How to Construct Bad Charts and Graphs – Klass, Gary http://lilt.ilstu.edu/gmklass/pos138/datadisplay/badchart.htm
- Maximizing PowerPoint presentation opportunities

Expand Your "Ask"

1. From "I need this (new) material" to "This addition to the collection will support (constituent population, activity, grade, program)."
2. From "We need more of" to "This addition will allow x more users or uses that support x."

What kind of data really gets the attention of decision makers? How do you present it?

- Visuals: Look for memorable design, layouts, color, pictures, video, testimonials (every man or expert)
- Unusual information (e.g., social networking information/data gathered)
- Unique data
- Contrast and comparison information
- Compelling data (length of time, depth of information)
- Pathos
- Unique approach to gathering the information presented
- Establishing relationships and context
- The "will of the people" (example: overwhelming numbers, significant data from target populations)

- The opportunity for leadership
- Opportunities for recognition
- Challenges
- Branding for memory triggers (that relate to what they need, what they know, what they do)
- Visions
- Mandates
- Expert information

What does the research about data say?

- Inputs and outputs no longer dominate. While such information should still be kept, the focus of this data should be in support of showing impact and evidence of impact specific to the organization's needs.
- Prevalence, conceptions/ misconceptions, and use of online resources by our users and non-users has greatly changed special libraries.
- Most research on special libraries focuses on economic studies (value, perception of value,) ROI and cost/benefit analysis, AND the impact or change on the customer's life.
- Most special libraries are "valued" by management but need to produce results to be funded and receive increased investment.
- What librarians care about isn't typically what their managers care about. Librarians' measures of inputs, outputs, general usage numbers, specific depth and breadth of resources, our individual hard work is important to us, but that data may hold only limited interest for decision makers. Leaders focus on the impact of services (and the inherent investment in those services) to the organization, business, or customer. How much good do we do? How much impact do we have?
- Historically, we have gathered user value information on acquisition (getting materials), cognition (intellectual value), and application. Although we have very few "gold standards" for performance measures and thus measuring value, we have a growing body of research on impact and ROI and cost benefit. No one thing works for everyone. We need to pick what convinces decision makers within our own environments. Current research focuses on:
    - What is the return on the money spent by the library? (Strouse, 2003)
    - How much does the library save its overarching organization? (Strouse, 2001)
    - Why is an in-house library the best option? (Strouse, Corporate Information Centers 2001; ACRL, Oakleaf).

    A sample of return-on investment impact studies includes: (ACRL, Oakleaf statements are quoted but with abbreviated cites.)
        - Time saved (multiplied by salary rate) (Mason and Sassone 1978)
        - Industrial productivity (Hayes and Erickson 1982; Braunstein 1985)
        - Shortened product cycle (Kassel 2002)
        - Reduced parts costs (Strouse 2003)
        - Labor savings (Strouse 2003)
        - Improved quality (Strouse 2003)
        - Increased sales (Kassel 2002)
        - Quicker response to threats (Kassel 2002)
        - Return on shareholder value (Kassel 2002)
        - Willingness to pay (Griffiths and King 1990)
        - Value of reading (Griffiths and King 1988)
        - Readings forgone by requirement to spend more time seeking information (Griffiths and King, 1990)
        - Money saved over alternative information sources (Griffiths and King 1990, 1988)
        - Risk of irrelevant or inappropriate information decreased (Henczel 20)
        - Willingness of users to pay (as shown by what they pay in terms of time spent seeking information and reading) (Griffiths and King, 1996) specifically general time and cost savings, and costs to the user of

alternative sources (including extra money spent due to loss of organizational purchasing power and additional information seeking costs).

Many businesses focus on productivity (such as number of formal records, publications, proposals, research plans, oral presentations, and consultations with concerns for proprietary information) and how worker productivity is affected by the library. (Koenig, 1992, 2005)

Impact studies are used extensively these days. A cautionary note: many consider *value* and *impact* to "soft" terms and best applied to individuals rather than hard assessments. In reviewing, shaping, and using impact studies, pay heed to the application and assigned definition to these terms.

- Most impact studies use a survey-based critical incident technique where individuals within the organization and clients talk about the impact information/service had on interactions, behaviors, results.
  - Did a doctor do business differently based on library service/information?
  - How was the patient's life impacted by the library service/information?
  - Did the (fill in the blank ex. investment counselor) "decide upon a course of action, improve the image of the organization, improve relations with clients, and exploit new business? Did library service help "avoid time lost, poor business decisions, loss of funds, or other resource wastes (J. G. Marshall, 1993) (ACRL, Oakleaf)
  - Did information lead to better informed decision making?
  - Did information/library service provide new knowledge?
  - Did the information add value to the client interaction? To the client?
  - Did information save time?
- Research impact results showed the most "important indicators of impact are 1) time saved in information retrieval and delivery and 2) higher success rate in research." (ACRL, Oakleaf)

What are ways to use research/data?

One of the responsibilities of a manager is to design, gather, and use research to support initiatives. There are a variety of ways to use research and research methods. Besides the more obvious ways (providing outcomes, asking questions, etc.), less obvious ways might include:

- Presenting information through a historical perspective such as inserting a historical probe as a cause and effect
  - let's compare support now to prior to the last contract or hospital expansion
  - pre-911 vs. post-911 (for example)
- Discussing or profiling by case method
- Storytelling concerning the issue/situation from the organizations, the employees, the client's perspective

Other more common ways might be:

- Survey research, or gathering data by survey instrument or seeking opinion through interviews or focus groups
- Delphi methods gathering future or predicting opinion based on expert knowledge (an expert, a panel of experts)
- Forecasting gathering data from models, experts and basing predictions based on analysis of data
- Statistical analysis software package or formula analysis of research data gathered
- Benchmarking as comparison and contrasting data from similar environments
- Trend analysis with identification of meaningful and appropriate trends identified to meet needs
- Gathering and using outcomes to support arguments, data presentation
- Value, ROI
- Impact studies

Specifically, the following list includes just some of the information and data that - when assembled and placed in perspective – "might persuade."

- Statistics of library for relevant years
- % and $ increases and decreases in the last xxx years (three, four or five as a sample number or placed in the context of a significant budget year for the library or the budget entity)
- Applicable professional standards

- Applicable professional formulas
- Vendor/commercial information
- Consumer price index for the area
- Lists of cost from professional agencies and journals
- Relevant census or entity "population" data
- Articles/information that relates, justifies or explains requests
- Consultant recommendations
- Portfolio of formal and informal dialogue
- Survey data (institutional only; snapshot day/national/statewide)
- Output measures information/outcomes information
- Formal/Informal client requests
- Reports - monthly, annual, special
- Paper trail of information memos
- Working and measurable outcomes, goals/objectives/strategies of the organization

Always consider:
1. dividing justification information into primary and secondary sources, and
2. assessing decision makers styles to determine which sources carry most weight.

You've Got the Goods. Now What?
On the Art of Persuasion

Convincing Decision Makers

When designing a value or impact or justification document, we need to pick the perfect data to "persuade." Although there are many permutations to the persuasion process and when we break down the process we know we need to:

- Get decision makers' attention and get them to *listen*
- Get decision makers to think about things we want them to think about/consider in a positive way
- Get decision makers to support (and/or fund) part/all of our needs/requests
- Get decision makers to carry *our message* to others
- Get decision makers to carry forward *our specific needs* to others

So, what is persuasion?

Persuasion – considered to be both an art AND a science - is the process of moving others by argument to a position or course of action either temporarily or permanently. A topic of research for many years, the study of persuasion includes:

- What the unique aspects or techniques of persuasion ARE;
- Ways to increase the likelihood of someone saying yes to requests when they are asked;
- Ways to get someone to not only say yes but also say yes AND change their attitude to our request;
- Ways to get others to say yes and change their perceptions; and,
- Ways to get others to say yes and change their behavior.

Persuasion is considered to be most viable and possible when a number of elements are incorporated into the request. These elements are addressed below.

- The most successful messages delivered are those that convince others of a need and then support presentation and **discussion of the need with data.**
- If two messages must be delivered, one desirable and one not or less than desirable, **the more desirable message should be presented first.**

- Message presentations should **include repetition of the need and supporting data** for the best learning and anticipated success and acceptance.
- Presenters should **stress similarities rather than differences of those involved in discussions/**those you are trying to persuade.
- Both **sides of issue should be presented in discussions and during the presentation of pros and cons**, the communicator's favored viewpoint should be presented last as listeners – typically not familiar with an argument - remember the end better than the beginning or the middle.
- Closure or summary **statements and conclusions should be stated explicitly.** Presenters should **stress the desirability of the argument to all groups involved.**
- Messages that require the greatest amount of opinion change are likely to produce the most change.Carl I. Houland, Yale 1940-1960

Six Principles of Persuasion

Six major principles of persuasion, based on Robert Cialdini's research, offer those building messages and persuasion principles and techniques significant approaches to influencing others from the frontlines. These six basic principles include:

1. Principle of Reciprocation
2. Principle of Scarcity
3. Principle of Authority
4. Principle of Consistency
5. Principle of Consensus
6. Principle of Liking

Cialdini, Arizona State, 1999-present

1. **Principle of Reciprocation**	**How might we use this?**
Societies are based on a concept "I am obligated to give back to you the form of behavior that you gave to me. If you gave me a favor, I owe you a favor. In the context of obligation people say YES to those they owe. It works because groups that play by the rules of reciprocal exchange gain a competitive advantage. Members of a group can call on other members of the group because when they send resources they aren't sending them "away." What you "give" is a credit. We need to master the art of "exchange." WHY? It sets the tone for partnerships to be formed. *Arguments for persuasion and reciprocation should have multiple opportunities for success, that is, those persuading should be ready with alternative requests if the first request is not possible.*	Our libraries provide content, information, materials to support – specifically - X content supports the client by x. X content provided support for securing the x contract or the x client. X content saves the (hospital, company) x based on y. Library resources provided the critical information for the successful product proposal… The library gathered outcomes data for supporting the client/the contract … Now we need… We need support for… We need your personal support for… We need for you to ask for x for us…..
2. Principle of Scarcity	**How might we use this?**
Scarcity of commodities is a major persuasion factor for people. Research shows that the merits of something don't matter as much as context…people want what they can't have.	Don't only tell them what their area will gain if they fund us…tell them specifically what they will lose and be specific.

How do you use this to persuade? • When you present an idea, explain what it is they will get that they can't get anywhere else… • Tell them the bundle of advantages they will get if they move in your direction. • Data show it is not enough to say what people will gain…people more motivated by what they will lose…SO we explain the unique benefits they stand to lose if they don't "go your way." • Many people avoid this because they think they are threatening others but use language that is neutral. Example: People have had access to something, now they won't…Rather than IF YOU DON'T think/vote my way, this is what will happen to you/your constituents….etc. *AND* *Scarcity works even better when you add the concept of "exclusive information."* *When you get a new piece of information/unpublished report available…if it supports what you want to argue…give it to the select people as soon as you can.*	If the library doesn't get the full operating request, we will… ….no longer be able to provide x content ….no longer be able to support this contract …only we can work with the proprietary knowledge…you can't outsource given the confidentiality… …lose these resources (be specific)… ….lose access to the following…and not just "they" will lose but targeted information as to what their specific constituents will lose…such as… ….the x department will lose… …the x contract won't be able to… Support persuasive arguments with data such as the organization's outcomes, strategic plans, tailored specifically to their area of study/expertise. *Give them data that "only they have" or create unique data just for them….a report that provides them with specialized information just for their needs in their language.*
3. Principle of Authority	**How might we use this?**
If an expert says it, it must be true…everyone's perception is that the most powerful have knowledge and trustworthiness. SO we want them to realize your knowledge and we need to establish your trustworthiness and we want to present your idea as a credible one …one they can trust…then convince them it's the best for them. SO, before you present your strongest arguments as to why you are trying to persuade others, raise your weakness first and tell them your strongest points outweigh/overwhelm the weaknesses. ▪ If you and your ideas have strengths and weaknesses, present the weaknesses FIRST and SECOND present your STRENGTHS. This establishes you (or your idea) first as trustworthy or credible (you told us your weakness or the weakness of the idea first) then as an expert (or why the idea is so good.)	• When delivering or asking for support/persuading others to support your message validate the credentials of your services and the credentials or expertise of the people presenting or attempting to persuade. • If your expectation is that those whom you are trying to persuade are best persuaded by the principle of authority, match the presenter based on their credentials or expertise. • This principle also works by sending individuals to persuade those who have served on the same committees and/or those who have had similar successes. • Messages should be validated during the process of persuasion by separating the argument with the weaknesses first and the strengths second such as: • The x is requesting additional money to subscribe to or hire x to produce x or support the organizations x initiative. During the persuasion arguments, those presenting should begin by stating what/who the hours won't serve first, then close by highlighting what the library *will* be able to achieve and for whom with the additional funding.

4. Principle of Consistency	How might we use this?
Consistency and commitment • We want to get people to say yes to us AND • To identify if they have done it in the past and • We want them to continue to support us by telling us verbally • And in writing commitment to telling us they will do it. Getting people to yes is not just the nod and smile but our goal is to include public commitment and if we can written commitment. Language that works is… Rather than saying…we hope you will SAY ………………would you please? or when can you?…	Choose others such as frequent supporters of the library to carry the message. *Ask them specifically --* We need to take our message to x and ask them to do x or support y: • Can we count on you to support us when we ask x? • Will you send an email to x in support of us? • Will you be featured as a supporting department when we request x? Will you 'testify' for us by talking about your contract or your client group and how library e-resources made it possible to support your client more successfully or bring the project in under budget?

5. Principle of Consensus	How might we use this?
"A lot of other people are doing, therefore, it must be the right thing." • People have to identify with or relate to or understand the "other people" who you are speaking of. • Bringing in general names and general categories doesn't work as well as saying people like them who are "signing on" to your idea/request/saying yes.	All of the (nurses, salesman, etc.) are supporting us in our request for x. We would like you, your, x to support us in our endeavor to x. Can you speak to x to request they support us?
6. Principle of Liking	**How might we use this?**
People like to say yes or people can be persuaded when: • They are aware that others are involved whom they like and who are like them • When they are complimented and thanked for doing a good job and • When they feel they are part of the whole who are working together for success.	• You have been chosen to carry this message because you have been so supportive of this information in the past. • We would like to feature your support on the budget request. • We are presenting this workshop to provide unique training to clinicians who have supported us during the year in our quest for expanded technology (or x). We would like to provide a basis for an ongoing dialog with groups to continue the discussion for next year's budget request for expanded tech training.

What combinations of persuasion techniques and data will convince your decision makers? Ultimately, how should you communicate with them?

Determining a match to your decision makers necessitates you finding out about what makes your decision makers make decisions.

1. Who do you need to convince?
2. What was/is their work responsibility?
3. What is their avocation?
4. What have they funded in the recent past?
5. What arguments have they used in the past to deny funding?
6. How do they like to receive information?
    a. An executive summary?
    b. Unique data?
    c. Comparison data?
    d. With known entities-internal?
    e. With known entities-external?
    f. Related to general industry standards and practices
    g. Related to specific profession/industry standards and practices
7. How do they "learn"?

Marketing for Success

How do you use marketing expertise and/or branding? What are top marketing ideas?

1. Do what you can to understand the future – and figure out when it "starts" including:
    a. determining what will be valued in the future in general, by your organization's clients, by your organization
    b. collating appropriate metrics
    c. assessing and using metrics to demonstrate value in the context of your organization, your organization's clients
    d. balancing what is hot and trendy and what has staying power simple and social
    e. design alignment steps
2. Choose Strategic Marketing (Identify what's next for your organization in your area and what they say is next in their area.)
3. Investigate frontline (appropriate) advocacy information and marketing and training
4. Consider a universal metaphor for marketing messaging – balance, transformation, journey, container, connection, resource, control
5. Commit to data/establish data process (value/ROI)
6. Translate metrics using only organizational language (impact)
7. Communicate value and communicate impact (metrics, targets, messages, taglines)
8. Focus on relationship marketing (organizational influencers) with focuses on health literacy; expert searching/expert discovery; design of unique knowledge; design of unique pathways; deciphering your organization's **"**speak" and relating it to what you do; expert vetting; changing target behaviors; identifying value for the client; discovering your formula of product/service mix
9. Provide modes and methods of delivery include display and deliver directly, proactively match unique information/data to user interests
10. Create packaging for content (digital, virtual, print)
    (Use your own "Explore, Dream, Discover" promotion/contest to apply and gather best practices.)

When we identify strengths …

- Our strengths have to match our client needs.
- Our strengths should blend classic and contemporary.
- We can't be subtle, we have to be clear.
- We need to put all strengths within the context of the organization.
- We need to use our umbrella organization's words.
- We should "credential" ourselves within the articulation of strengths.

When we communicate value …

- Not everyone knows (or cares) what we do unless we contribute to "their" value.
- We should articulate our value within their "currency."
- We should keep our communication of value simple and straightforward.
- We should personalize our value to the "client."
- We should include ourselves and what we "do" within value statements.

We need to:

Determine organizational language/terminology

Meeting expressed needs AND determining and meeting unexpressed needs

Identifying highest priority customers/target markets

Measuring, assessing and communicating value

Outcomes in the context of umbrella outcomes

Determining what stakeholders value

Customization of content and direct delivery

How do stakeholders measure their success …if they have a product development process, shouldn't you.

Identifying specific elements of organizational success and how the library supports that success

Provide fewer choices, not more…if there are more, deliver in a vetted format

Highlight expert vetting

Find and perfect your formula of product and service mix

Offer data on return on investment

Illustrate expertise into…determining appropriate formats…dropping information into appropriate formats

Identify critical data used as support for organizational decision making

Document and create evidence of impact

How do we work with stakeholders?

- control groups that have the potential of control or being well-defined such as a group where a significant number return each week: story times, lap sits, teen advisory groups, all the teachers in a school who use the library over a year, club members who use the library for meetings/events, groups of teachers and/or kids from childcare environments
- loosely identified control groups (who are identified in that it is likely they return to the library to use/get your product) might be your genre readership, those who use the library every x (such as every Thursday morning;) those who routinely come in to the library to use a service (PC's, copiers)
- groups can be asked to respond as a group or as individuals during an event or visit, pre an event, post an event, pre and post an event or activity.. to one-time verbal survey questions, to a snapshot written or e-survey survey, to an ongoing verbal survey...to an ongoing written or e-survey survey
- individuals can be identified specific to their use or randomly for interviews
- focus group of people invited randomly through internal and/or external advertising for participants
- focus group of specific people invited because of their connection to the community

- a panel of people (Delphi group) can be identified to answer general/future questions or respond to scenarios, projecting or predicting for a period of time, then asked to respond to what happened actual post events
- online and/or in-person pre and post tests can be given before and after library events to identify level of awareness or familiarity or knowledge or level of skill or attitude or behavior
- observable but specific recordkeeping by staff…that is statistical assessment designed to determine specific factors
- observable behavior based on a rubric or model designed to record specific behavior. Specific to assessment of student learning:

--Standardized tests
--Locally developed tests
--Embedded test items
--Capstone Courses

--Capstone Experiences
--Portfolios
--Course-by course competency analysis (general curriculum, library curriculum)
--Journals

What are the best ways to making your case now, tomorrow, and in the future?

After you get it, use it!

1. Add data to your homepage, wallpaper, screensaver marquee...a different fact, outcome, measurement, assessment every week.
2. Create an annual report comparing statewide data to your library's performance (standards, etc.).
3. Feature data in everything that "represents" you in a column in your library's newsletter, blog or wiki…the "community" newsletter, blog or wiki, your email signature.
4. Feature data in your letterhead, on orientation, general instruction and library instruction content handed out, your fax sheets.
5. Integrate data into all plans, aspects, budget content.
6. Prepare a teacher workshop/ask a neighboring librarian to deliver a teacher's workshop on the library's contribution to student success (for K-12 or P-16, private and public schools, higher ed environments, etc.).
7. Feature library outcomes in marketing the library.
8. Put interesting library outcomes/facts on library tabletop signs, library posters, bulletin boards.
9. Create tabletops, paper placemats, posters for non-library locations with a different fact, outcome, measurement, assessment every week.
10. Add data to any mail out (include fine notices, letters home) .
11. Ask Friends, Boards, PTA, other community organizations, groups if you can include content in their newsletters, emails, etc. with a different fact, outcome, measurement, assessment every week.
12. Team with a classroom teacher to present a student success/outcomes presentation and/or workshop for a specific discipline using data.
13. Integrate data into marketing/advertising library services brochures, bookmarks.
14. Link budget requests to constituent data/outcomes.
15. Ask administrators to include library constituent success data into presentations (and/or create your PPT presentation for them to add their data and deliver).
16. Create a library report card to highlight overall successes, specific features, areas needing attention.
17. Create a constituent-specific library report card to highlight successes, specific features, areas needing attention.
18. Create grade-by-grade profiles of library resources that support the curriculum, that support preparing for tests.
19. Create "over the summer" library activity profiles for teachers integrating school and public library content.
20. Gather/use data (database, e-book, audio book, streaming) "match to curriculum" for disciplines & grade levels.

21. Focus on cutting edge 21st century library "land" no matter what's in your library such as:
    - linking to and advertising "23 things"
    - e-resources and access in general
    - library designed or identified web-delivered resources (streams, learning objects)
    - instruction assignments that support standardized area/school textbooks, and curriculum assignments etc.

Remember

1. Just because you CAN prove it or count it or measure it, doesn't mean you should.
2. Just counting or measuring but not reporting within a framework or for a specific outcome does not report significant information.
3. Focused or snapshot counting can be as successful as bean or hash mark counting.
4. Reporting numbers and use should make "sense" to not only you but to umbrella groups.
5. Divide assessment data into primary and secondary sources.
6. Assess management styles to determine which sources carry most weight.
7. Don't forget using assessment is matching content to specific people you need to convince, so…
   - Figure out who you need to convince…
   - Figure out what convinces each group…
   - Your library data?/Comparison data?
   - Your data matched to your students?
   - Your data matched to school initiatives?
   - Your data designed, gathered and delivered in outcomes?
   - Your data delivered in state assessment terms?
   - Find examples of other success stories…
   - Match "success story" data to your type of library and your "who"
   - Identify opportunities for delivering the message.
8. **DELIVER THE MESSAGE! FOLLOW THROUGH.**

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