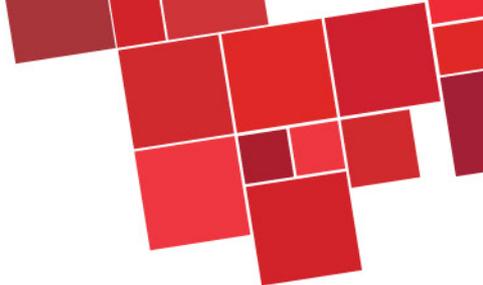




# **When “*We’ve Always Done it This Way*” Starts to Get in the Way: Beginning Adventures in Service Assessment**

Presented at ABOS 2019 Conference  
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King County Library System



**Share one service/aspect of  
service/procedure/process,  
etc. that you do, but you  
don't know why you do it**

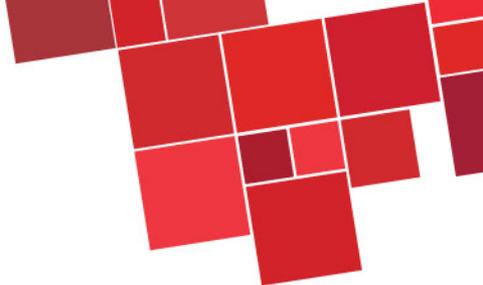
**\*Bonus-You've never seen/don't  
know if there is any documentation  
for it.**



# Service Assessment?! Why?

- Stay current on community needs and interests
- Be sure that time/energy/resources are given to appropriate services
- Keep in alignment with changing initiatives, missions, values, visions
- Clean up practices/services/methods that need updating
- To ensure good stewardship of funding
- Discover opportunities for change, leading to action
- Many other reasons!





# What this presentation covers

Core Aspects of Service Assessment

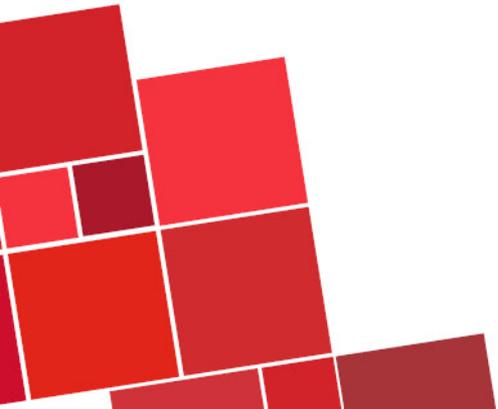
Tools to help

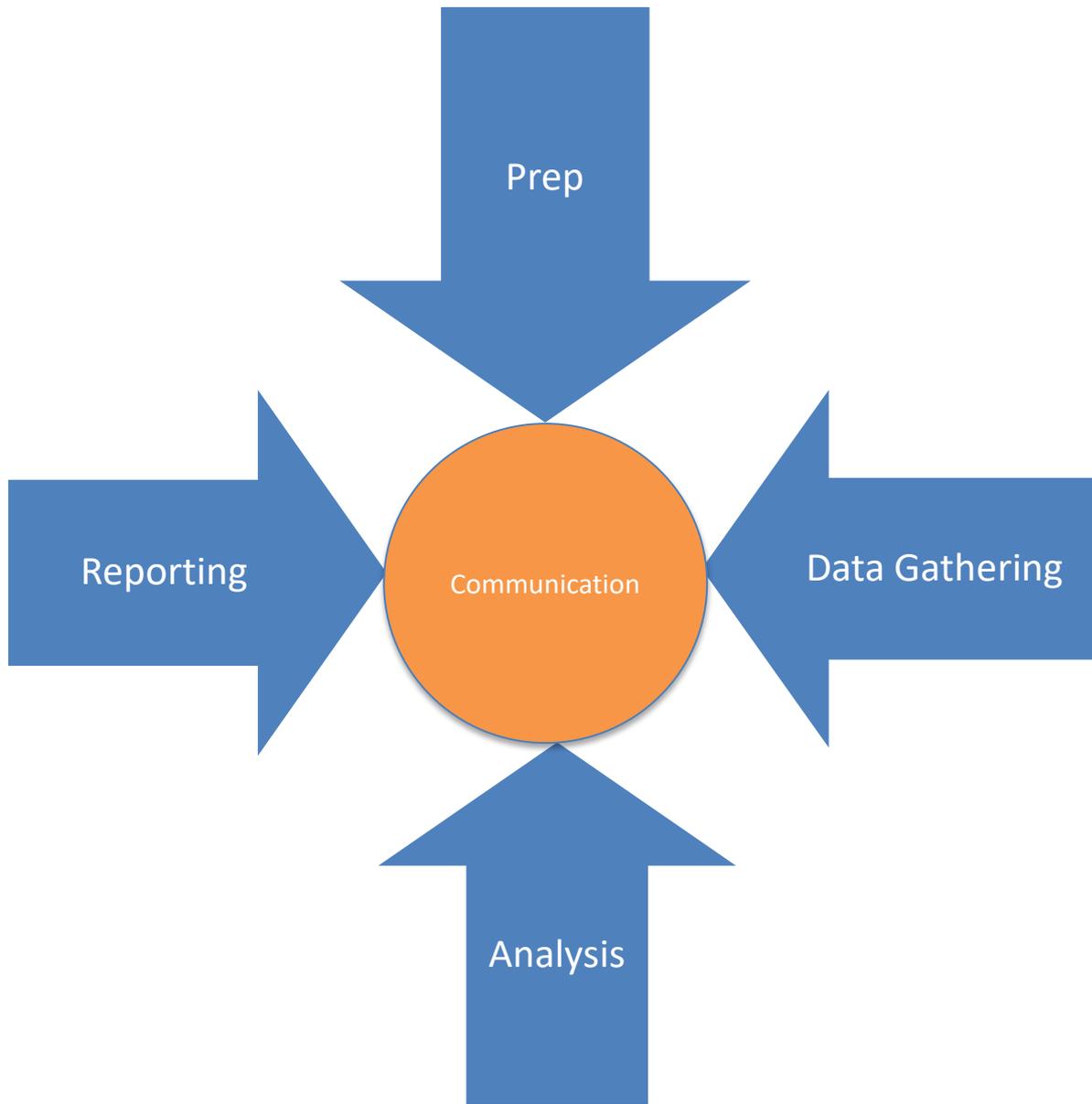
A few examples



# Core Aspects of Service Assessment

Preparation  
Data Gathering  
Analysis  
Reporting





# Preparation-Check in

- Know your motivations, intentions, and obligations
- Plan to communicate (a lot)
- Consider emotions/emotional reactions you may encounter and how to address them. Common responses you may encounter:
  - Defensiveness
  - Anger/Fear/Anxiety
  - Pride
  - Excitement



# Preparation-Questions to consider

How much time do you have?

Will you need staff to cover meetings or research time?

Do you need a committee/small group/just you?

What staff or management need to buy in?

Who (internal and external to the work) would provide valuable insights or perspectives?

Who owns the work?

How will you communicate progress?

Where and how will you manage documents and data?



# Data Gathering

Data-qualitative and quantitative information that allows you to:

- Describe the service
- Describe the community
- Describe the impact of the service
- Describe what is needed to ensure the service is adaptable to changing community needs



# Data Gathering-General Tips

Gathering appropriate data is critical.

You'll need data with these qualities:

Internal-from within your org.	External-from outside your org.	Relevant
Current	Source is identified and reputable	Method of collection is transparent and described
Aggregated (reports, estimates) and maybe disaggregated (microdata)	Qualitative	Quantitative



# Data Gathering-Describe the service

- Write a recent history of the service.  
Describe:
  - Mission of service
  - A narrative of the service and operations
  - Positions/classifications (ex. 3 FTE, 8 volunteers, etc.)
  - Resources needed to perform typical service(vehicles, collection, etc.)
  - Pertinent history



Tip! If you don't have a mission statement for your service, you've just discovered a great opportunity to develop one!



# Data Gathering-Describe the service

- Interview staff who provide the service
  - Build questions using an analytical frame work (SWOT, SOAR, there are many kinds)
- Use the framework to write a service analysis report through combining all the data you've collected on the service



Tip! The purpose of this report is to be descriptive and objective. This is to give an overview of the service, not recommend changes yet.



# Data Gathering-Describe the community

At a minimum, you'll need to know these things about your communities to develop a **demographic profile**:

- Population
- Specific population demographics, as granular as needed (census block group, zip code, city, county, school district, etc.)
  - Ages
  - Income
  - Housing specifics-renting or owning, average costs of housing within each
  - Spending habits (maybe)
  - Disability status (maybe)



Tip! This is the whole community, NOT just cardholders. If your system has several cities, then use cardholder data to narrow down what cities to profile.



# Data Gathering-Describe the community-Freely accessible data

- Freely accessible Federal Data-American Community Survey, Census,
- Local agency reports (School districts, Aging agencies, housing authorities)
- Research Nonprofits (such as Pew Charitable Trust, The Gates Foundation, orgs. that offer research or other types of grants for services)
- Local nonprofit specializing in pertinent areas (Meals on Wheels, Health Orgs., etc.)



Tip! The data must be the **MOST CURRENT** available! If the data are more than three years old, keep looking.



# Data Gathering-Describe the community

## Fee-based data

If your system subscribes to any marketing or demographics software for community analysis, use that.  
If not, and you want to look further....

Answer this question:

Who profits from data on your service population?

Short answer, but not the only answer: Look for marketing research data. (\$\$\$)



Tip! Check in with any local public colleges and universities. They may have a market research databases that you can access on site as a researcher. If not, check in with your friendly local academic librarian!



# Data Gathering-Describe the community

## Example Demographic Profile

### 98011-Bothell

Median age: 37.7

Population 65 and older current: 13.5% of population

Population 65 and older projected to 2021:

-ages 65 to 74 will increase 23.5%

-ages 75+ will increase 13.5%

Average Household Income: \$110,723

Percentage of Population Living with Disability: 9.82%

Top Mosaic segment description:

Booming with Confidence (15.03%)

This group contains single-family homeowners within the ages of 51-65 who are highly educated and affluent. They are active in community organizations and prefer print media. They watch their financial investments and give to charities. Most have been in their suburban homes for 15 years.

KCLS Libraries within less than 3 miles:

Bothell

Kenmore

Sources: Policy Map (\$\$\$),  
American Community  
Survey(Free)Mosaic/Experian  
(\$\$\$), Google Maps (Free)



# Data Gathering-Describe the community of cardholders

Gather data on your cardholders. Look at:

- Active accounts for your service (special designation in ILS?)

Then drill down into:

- Cities, zip codes, addresses, etc. (whatever geographic granularity is logical)
- Particular ages
- If possible, distance from a branch library
- Whatever else you could discover from your ILS that may be helpful in the context of your service



# Data Gathering-Describe the impact of the service

In order to get this data, you'll have to go right to the source....the patrons! (Check in with any volunteers too!)

Survey patrons on these core aspects:

- What they like best
- Changes they would make
- How it impacts their life
- Any other specifics you want to know about



Tip! Keep it brief! Ten simple questions **at a maximum**. Include observational data too.



# Data Gathering-Describe the impact of the service

When surveying Outreach populations, consider

- No library jargon, use common words
- Closed-ended questions may work better
- Phone or in-person is best
- Again-keep it brief!
- If you need to be more conversational rather than questioning, then use that strategy.
- This will likely not follow typical practices of a survey. (That's okay.)
- No pressure. If they're not comfortable they don't have to answer the questions. (This means no quotas for staff.)



Tip! Think about how clipboards can mean "inspection" or authority rather than a friendly chat.



# Data Gathering -Describe the impact of the service

Analyze survey data

- Use Excel (or similar program) to tally the responses
- Chart or Graph the responses
- Use a Tag Cloud for any open-ended responses

**Q. 8 What do you like best about home delivery? This was an open-ended question. The responses are formatted into a cloud of recurring words.**



Tag Cloud of responses



# Data Gathering-Analysis Tools

## Free

- Google Drive (Sheets, Maps, privacy caveats)
- If you already have-Microsoft Excel
- iOS/Apple Numbers
- LibreOffice
- Tag Cloud
- Tableau Reader-only useful if you already have GIS files that work with it



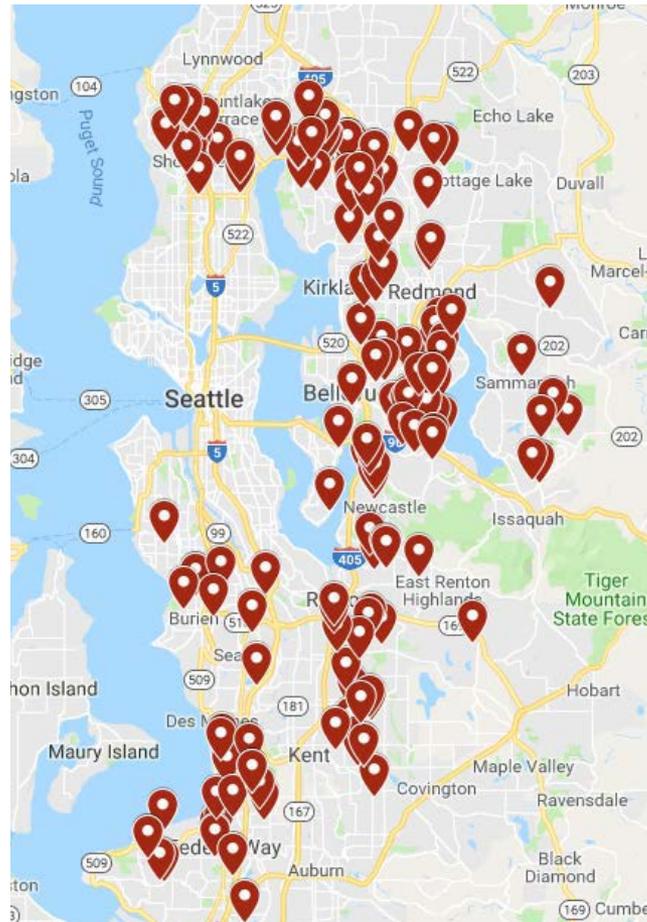
Tip! You can import addresses into Google Maps. You can then create maps of areas of service. This could be a helpful graphic to include in a report.



# Data Gathering-Analysis Tools

## Free

Google Maps example with imported addresses

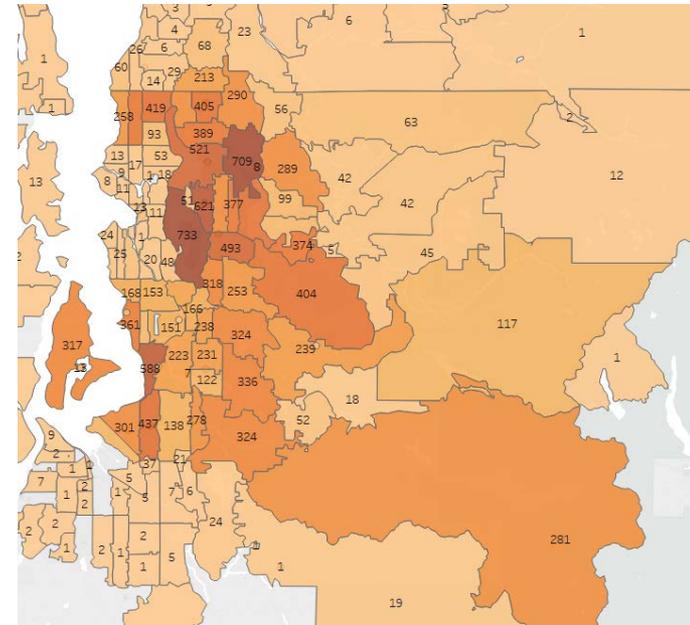
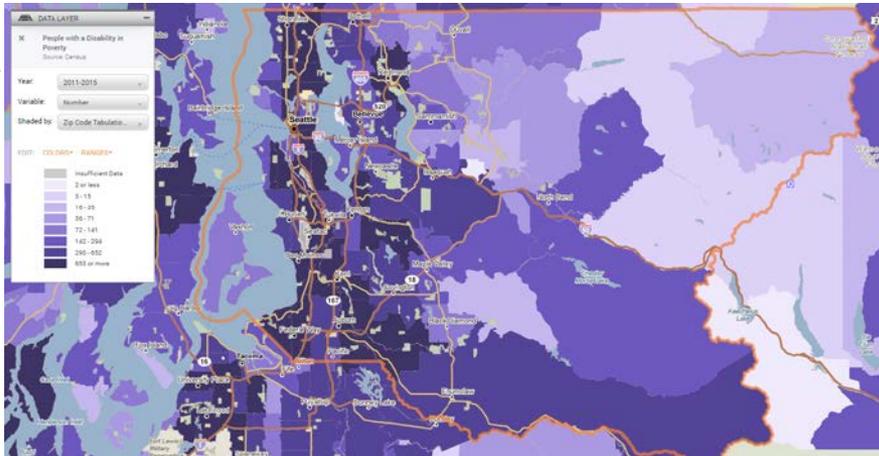


# Data Gathering-Analysis Tools –(\$\$\$ and tech training required)

- Tableau-for use with/internal data
- Policy Map
- Simply Analytics (Academic)
- Social Explorer (Academic)

Tableau-Heat map of Cardholder age 80+

Policy Map-Heat map of pop. Living w/disability in poverty



Tip! Check your local public colleges and universities for access to market research data and analysis tools. They may have a public workstation!



# Reporting

You've prepped, gathered and collected data, so now what?

**Write a report. Or write several.**

Considerations for multiple reports:

- One SWOT report (or whatever model you use)
- One demographics report
- One survey report
- One final report that includes summaries of the three and contains recommendations



# Reporting

## Writing for management

- Keep it to a minimum, include a summary at the beginning, add appropriate visual data depictions/infographics
- Use narrative anecdote sparingly and specifically to punctuate and support data
- Illustrate how service and any recommendations meet the mission, vision, values, strategic vision, any new applicable initiatives, etc.
- Tone is professional and objective-rather than stating opinions, report observations instead of emotions



# Reporting

## Example of Summary Page

Quick Overview Summary Chart of [Current](#) and [Recommended](#) Service Models

Service Model	Required Resources	Time (approx.)	Delivery Details
Current-17 Home Delivery Routes by Staff, chosen by patron inquiry, includes all service aspects (selection-ordering-checkout-checkin, etc.)	Staff labor, KCLS Vehicle, fuel, bags and boxes	8.5 staff hours per 10 stops (stop serves 1-6 patrons)	A box or bag of items, any quantity, range of type and format
Current-Home Delivery by Volunteer, 1 stop/month, managed and supervised in OU, includes most service aspects (selection-ordering-checkout-returns items to branch)	Staff labor, Volunteer time, volunteer transportation, bags	2.5 hours volunteer hours per 1 stop 4 hrs of subsistence management of 9 volunteers, and ordering. Note: Volunteer hours have a cap of 3-7% of operational hours.	A bag of items, any quantity, range of type and format
Recommended Mail-Free Matter for Blind or Handicapped	Staff labor, custom bag, zip ties, paper instructions	Expected 30-60 minutes to select items from in-house collection, or order, per bag serving 1-6 patrons	Format of a minimum of 14 pt type or audio recordings
Recommended- Mail	Staff labor, two-way postage, custom bag, zip ties, paper instructions	Expected 30-60 minutes to select items from in-house collection, or order, per bag, serving 1-6 patrons	Between 1-10 items wanted, depending upon item type
Recommended-Volunteer delivery in AFH stops only-Branch supervised, OU managed, and minimum of 2 stops/month, pick up/drop off only	Staff labor, volunteer time, volunteer transportation, bags	Expected maximum of 4 hours/month for volunteer. 4 hours of staff time for management. Note: Volunteer hours have a cap of 3-7% of operational hours.	A bag of items in varied quantity and format
Recommended-Current staff delivery model with modifications based on equity, Medicare acceptance(AFH), and location, core zones	Staff labor, KCLS vehicle, fuel, bags and boxes	8.5 staff hours per 10 stops (stop serves 1-6 patrons) AFH locations not accepting Medicaid would move to volunteer or be waitlisted	A bag of items, any quantity, range of type and format



# Report submitted. Now what?

- Appreciate yourself and others who contributed to the process
- Reflect on what you've learned
- Prep for feedback, criticism, edit requests, and any emotional reactions
- Know your work well-be prepared to talk about it
- Open to the possibility that recommendations may or may not happen. How will you feel either way?
- Remember that this is a process



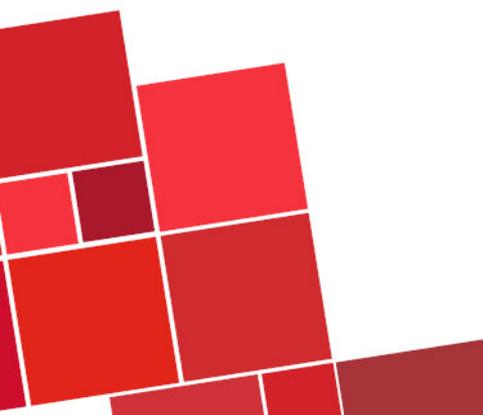
Concerns?

Tips from your experience?

# Questions?

Thoughts?

Insights?





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