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

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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:

<table>
<thead>
<tr>
<th>Internal-from within your org.</th>
<th>External-from outside your org.</th>
<th>Relevant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current</td>
<td>Source is identified and reputable</td>
<td>Method of collection is transparent and described</td>
</tr>
<tr>
<td>Aggregated (reports, estimates) and maybe disaggregated (microdata)</td>
<td>Qualitative</td>
<td>Quantitative</td>
</tr>
</tbody>
</table>
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 framework (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

access activity available books bring care caregivers
convenient delivery dvds free getting interests
library materials otherwise person reading regular
saves service something staff
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)

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

<table>
<thead>
<tr>
<th>Service Model</th>
<th>Required Resources</th>
<th>Time (approx.)</th>
<th>Delivery Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current 2.7 Home Delivery Routes by Staff, chosen by patron inquiry, includes all service aspects (selection-ordering-checkout-checkin, etc.)</td>
<td>Staff labor, KCLS Vehicle, fuel, bags and boxes</td>
<td>8.5 staff hours per 10 stops (stop serves 1-6 patrons)</td>
<td>A box or bag of items, any quantity, range of type and format</td>
</tr>
<tr>
<td>Current-Home Delivery by Volunteer, 1 stop/month, managed and supervised in OU, includes most service aspects (selection-ordering-checkout-returns items to branch)</td>
<td>Staff labor, Volunteer time, volunteer transportation, bags</td>
<td>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.</td>
<td>A bag of items, any quantity, range of type and format</td>
</tr>
<tr>
<td>Recommended Mail-Free Matter for Blind or Handicapped</td>
<td>Staff labor, custom bag, zip ties, paper instructions</td>
<td>Expected 30-60 minutes to select items from In-house collection, or order, per bag serving 1-6 patrons</td>
<td>Format of a minimum of 14 pt type or audio recordings</td>
</tr>
<tr>
<td>Recommended- Mail</td>
<td>Staff labor, two-way postage, custom bag, zip ties, paper instructions</td>
<td>Expected 30-60 minutes to select items from In-house collection, or order, per bag serving 1-6 patrons</td>
<td>Between 1-10 items wanted, depending upon item type</td>
</tr>
<tr>
<td>Recommended-Volunteer delivery in AFH stops only- Branch supervised, OU managed, and minimum of 2 stops/month, pick up/drop off only</td>
<td>Staff labor, volunteer time, volunteer transportation, bags</td>
<td>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.</td>
<td>A bag of items in varied quantity and format</td>
</tr>
<tr>
<td>Recommended-Current staff delivery model with modifications based on equity, Medicare acceptance(AFH), and location, core zones</td>
<td>Staff labor, KCLS vehicle, fuel, bags and boxes</td>
<td>8.5 staff hours per 10 stops (stop serves 1-6 patrons) AFH locations not accepting Medicaid would move to volunteer or be waitlisted</td>
<td>A bag of items, any quantity, range of type and format</td>
</tr>
</tbody>
</table>
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
Questions?

Tips from your experience?

Thoughts?

Concerns?

Insights?
Thank you!!!

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