The booklet is also available to download from:
http://www.intute.ac.uk/supportdocs/physiotherapy.pdf

"High quality information services: evidence based information delivery".

Feedback from the afternoon session with Larraine Cooper at the LfN study day held on the 24th November 2006 (Proving our worth: evidence for the value and effectiveness of library and information services)

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Larraine Cooper (The Larian Consultancy) undertook the afternoon session at our study day which included group discussion and feedback. The theme was business planning and performance management to convince managers and fund holders of the value of library and information services and to obtain knowledge about the quality of services in a climate of constraints on resources. Larraine included information from the EFQM (http://www.efqm.org) on quality and excellence, concentrating on the 'Fundamental Concepts of Excellence' model especially emphasising

- Customer Focus (two groups)
- Results Orientation (no feedback obtained)
- Management by Processes and Facts (one group)

The group work consisted of discussion around these three areas which is detailed below:

Customer Focus (two groups fed back, one NHS and one HE)

How is customer satisfaction assessed?

- Surveys / annual survey (more frequent if possible), LibQual, etc.
- Questionnaires
- Feedback forms posted on library web site
- Feedback forms included with work undertaken by library staff
- Feedback forms left in library
- Feedback forms provided with library user training
- Comments box or book
- Library promotion leaflets to contain a feedback or comments section
- Focus groups and user groups
- Current awareness bulletins to include a feedback form
- Library induction for new staff to include a feedback form
- Course feedback forms
- Committees, faculty boards, meetings etc.
- Letters, memos, emails
- Unsolicited response from customer / informal feedback

2. Are assessments based upon your perceptions or customers' perceptions?

Probably customers' perceptions, but it could be both of these. There is a need to redress this and bridge the gap to reveal the real facts.

3. To what extent are you able to make statements like "90% or our customers rated this service as good or excellent"?

- This is not necessarily easy to quantify. Also not everything is tangible.
- This appeared to depend on getting customers to take notice and reply to the request for feedback. However, of those library users who did respond, the figure for 'good' or 'excellent' was near to 90 per cent.
- For an example, the University of Worcester makes use of a 'Balance Score Card' system, where they aim to achieve high scores of 3-4.
- Analysis of surveys – gives percentage figures.
- Anything below 90% needs urgent investigation and follow up.
- Can we measure service quality electronically, and if so, how?
- Need to keep an audit trail.
- Need to know what we are measuring and why.
- Standardize statistics collection
- Keep qualitative evidence as well.
- Need to look more rigorously at inputs, outputs and outcomes.

4. Do you know how many of your potential customers you are getting to (market penetration)? How could you validate such a statement with underlying facts and data and a clear audit trail?

- This is not easy to fully know.
- Need to continually think of inputs, outputs, outcomes.
- There is a need to obtain knowledge regarding all of our customer groups – faculties, courses, years, sector etc. and this is not always easy. Perhaps there is a need to break down these segments much further than we are used to doing? Library staff working in small single site libraries felt confident that they were reaching the majority of their potential customers. Library staff working in libraries covering a wide geographical area; were doubtful that this is the case. For example, a Public Health library responsible for the library needs of five NHS Primary Care Trusts covering Essex, reported that it was very difficult communicating with such a large number of people who had very different library user needs.
- Measure 'tangibles' and make use of library management systems e.g. loans, reservations, Inter Library Loans – requests, completed requests, time taken, enquiries etc.
- Keep statistics and an audit trail of teaching sessions, enquiries etc.
- Create a standard set of data to be collected.
- Statistics can then provide an audit trail of library transactions and customer service.

Examples of library statistics:

- Details of what items were borrowed, how many, for whom and when, from library stock or from elsewhere.
- How many books, journal articles etc. were borrowed / obtained via Inter Library Loan, from where (BL, local lending schemes etc.), cost and time involved.
- How many people needed staff help with using the online resources national core content, databases, academic library website etc.
- Number of customers seen during 'induction' / on library tours etc.

H.E. students are often only seen once either induction weeks or in their final year when they find a need to go beyond Google when undertaking dissertations. For example - in a Public Health library staff had ways of reaching potential customers such as: library promotion information packs sent to PCT staff induction days, and to all GP practices; current awareness bulletins disseminated by e-mail to all staff in each PCT and the library web site promoting the library's services and advertising the library training sessions etc.

- How much user training / teaching was given; how many library users received informal/formal library/computer/searching/information retrieval training etc. and how much library staff time was spent on all these.

- Details of enquiries (phone, face to face, email etc.) e.g. in an NHS library service - name of enquirer; their job title; which PCT they are employed by; nature of the enquiry, sources used; how much time was spent on the enquiry; outcome of the enquiry and the name of the staff who dealt with the enquiry.

This data and information can then be collated and reported to senior management.

Additional activities could include:

- Follow up by case studies – what did customer do with the output say one month on (outcome)
- When developing Performance Indicators for services – put in the things you can control, take out the things you cannot control.
- Undertake some research e.g. 'mystery shopper'

5. What urgent steps must you implement now to improve your customer focus?

- Develop and implement a regular survey mechanism.
- Develop and implement an audit trail.
- Presentation of a 'case study' of a library user to demonstrate the value added benefit of using the library services. (E.g. the time saved to a Consultant or GP and the financial benefit to the NHS).
- Need to tighten up on identifying measurable indicators.

- Need to find out exactly who our customers are.

Management by processes and facts

1. What processes do you have in place to ensure all policies, strategies and objectives are implemented and progressed?

Most discussion group members stated there were effective processes in place to review progress with objectives such as Operational Plan Updates being standing items at team meetings. However many objectives set were not time-limited. When objectives were not met there were no sanctions in place and most objectives were simply carried over to the next planning cycle, or dropped.

2. What processes do you have in place to review on a routine and regular basis the extent to which your service plan objectives are being implemented on time and within budget?

Service Standards are in place in some workplaces within this group, relating to services such as responding to search requests or document delivery, but there was a feeling that workloads often meant that these standards where not monitored effectively. Much statistical evidence is collected but not enough analysis is made of the statistical information.

3. How is current and projected performance reviewed and interpreted

Librarians in this group also reviewed and monitored user expectations and met or unmet demands on their service through user surveys. However it was felt that surveys results

were not widely disseminated enough to effect change in service provision.

4. What evidence can you produce to show that day-to-day management decisions at supervisory, middle management and senior management levels are based on reliable information relating to current and projected performance?

The consensus was that much statistical evidence is collected but not enough analysis is made of this information to implement change. There was a need for more careful prioritising of objectives, reporting on performance and interpretation of statistics linked to outcomes.

5. What processes do you have in place to access and manage risk? (Risk could include customer dissatisfaction, reduced demand for services, costs becoming prohibitive to fund, reduction in staff morale and motivation).

Lots of liaison functions are in place in to minimise risks such as customer dissatisfaction or risk of reduction in demand of service e.g. staff/student committees, user surveys and liaison librarian roles. However the group did not identify processes in place that would address other risks such as financial or low staff morale and motivation.

6. What urgent steps must you implement now to improve your customer focus?

Make sure that time-limited objectives are drawn up and business cases are written, based on these objectives. Objectives also need to be reviewed on a more regular basis.

Log and monitor professional activities (less visible-
e.g. ensuring up to date stock, choosing and making the best e-
resources available) in addition to the non-professional
activities (more visible e.g. issuing loans). Distil this information
in a digestible format to present to our funders to highlight the
impact of our service.

Finally Larraine summed up by asking groups to prioritise the
two most urgent steps they should take to ensure their Library's
services are valued by funders into the medium term, to the
extent that they will finance the library to deliver good or
excellent library services to your customers.
These are the key points noted:

Customer focus – (NHS group)

- To develop and implement a regular survey mechanism
- Follow-up (implement an audit trail) for services provided
  e.g. literacy searches, demonstrate value of the service
  through a Case-study - how much time has the library
  staff saved the consultant or doctor, nurse

Results orientation (NHS group)

- Analyse the trust business plan and align objectives and
  set up systems that reflect these and prove contribution
- Discover the status of the National Service Framework -
  promote in the trust - key stakeholders to target

Managing processes and facts (HE group)

- Ensure there is a clear set of SMART objectives for our
  services

- Develop a business case to achieve the above

Joint groups (mix of NHS, HE, other)

- Two issues; Measurable measures of satisfaction
- Case studies - following up people (tool)
- Improve statistics collection re. information literacy/professional hours spent PRI's were using

Compiled with grateful thanks to all participants, especially the group leaders, including Karen John-Pierre (Management by processes and facts) and Lesley Overall (customer focus NHS).