




# Buy-in not Opt-out

How public libraries can create a culture for staff driven metrics


RIPL Webinar Series  
September 28, 2017  
2:00-3:00 Eastern / 11:00-12:00 Pacific

#RIPLeffect



## Chris Cairo

Director of Strategic Planning and Assessment  
Indianapolis Public Library



# Buy-in not Opt-out

How public libraries can create a  
culture for staff driven metrics

Chris Cairo  
RIPL Webinar  
2017

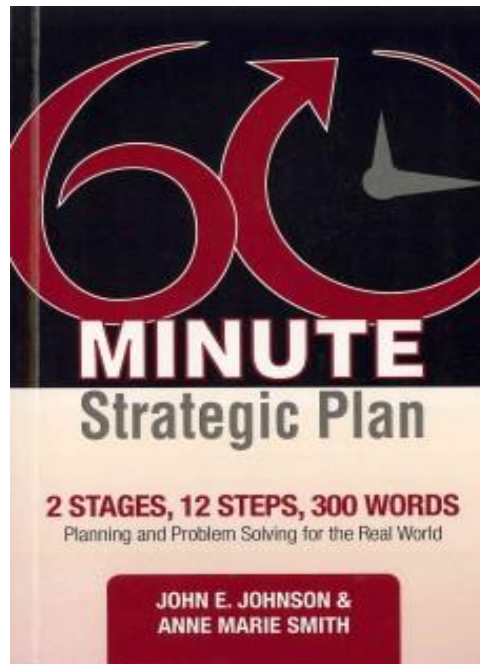


# Strategy

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5



6

A rectangular slide with a light blue background and rounded corners. A horizontal olive green band across the middle contains the word "Survey" in white serif font. A thin orange line is positioned just below the olive green band.

Survey

A rectangular slide with a light blue background and rounded corners. The word "Strategy" is on the left, followed by a large olive green arrow pointing to the right, and the word "Future" is on the right.

Strategy → Future

**Poorly Understood Strategy** – Most libraries have a strategy but, according to one study, fewer than 5% of their staff know the strategy.

**Weak Strategy Execution** – Studies show that up to 90% of strategies fail due to poor execution.

**Inability to Adapt to Change** – Once a library makes plans, the chaos of everything changing around it may gradually erode those plans unless the organization can adapt. Many cannot.

**Lack of a Systematic Approach** – Discipline is needed in all size libraries.

**Staff is Not Engaged** – An engaged worker is one who is personally committed to the goals of the organization. Unfortunately, 90% of the time, what passes for commitment is compliance. If you cannot get people engaged, no improvement will last.

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Reasons  
Staff  
don't  
engage  
in  
strategy

10

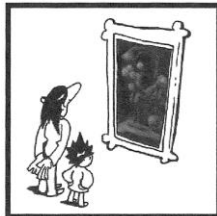
# Resistance

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11



Just tell me what I need to know



I'm too busy doing my job to think about analyzing data



How much is enough?

The Library is too focused on strategy and not enough on public service

12

**Martin Luther King  
Jr's greatest speech  
was not called "I Have  
a **Complaint**"**

- Van Jones



13

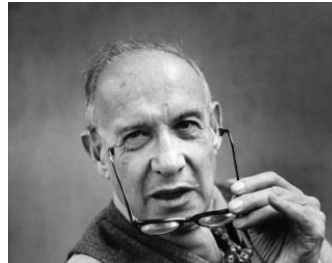
# Complacency

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“There is nothing so  
useless as doing  
efficiently that which  
**should not be done at  
all**”

-Peter Drucker



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# Confusion

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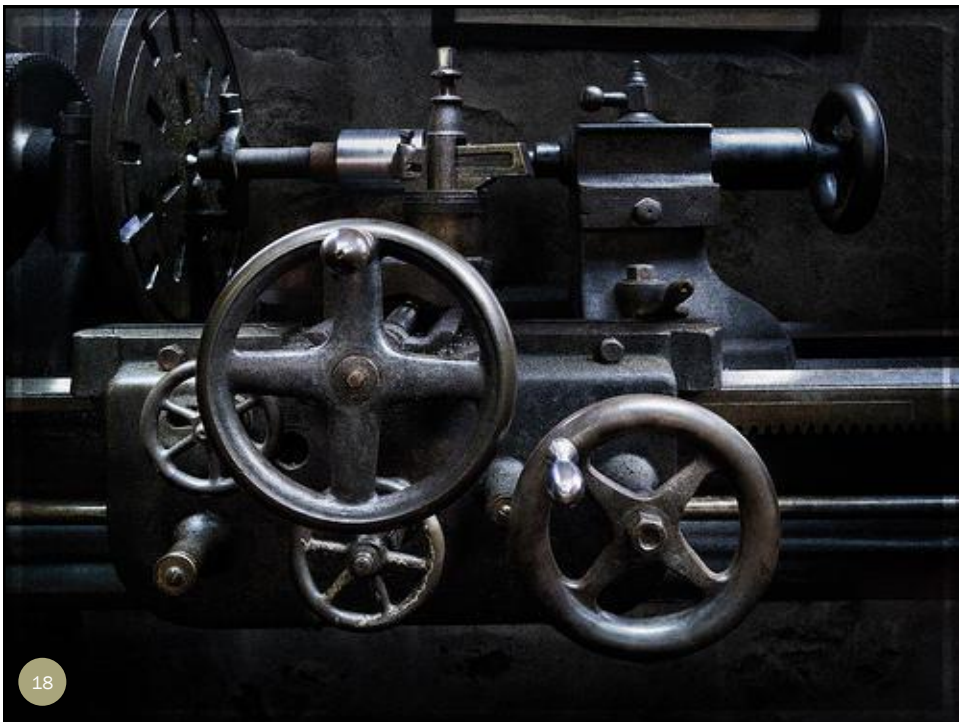
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“I can’t say as ever I was lost;  
but I was mighty **bewildered** once for  
three days.”

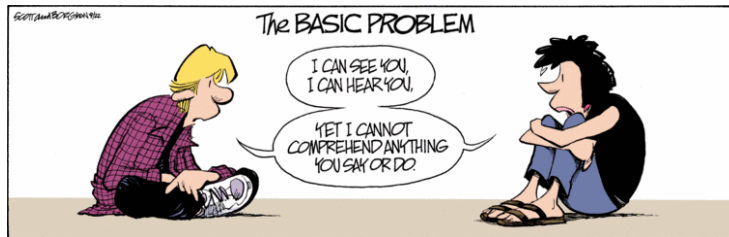
*Daniel Boone*

17



18

To effectively communicate,  
we must realize that we are all  
different in the way we  
**perceive** the world... -Anthony Robbins

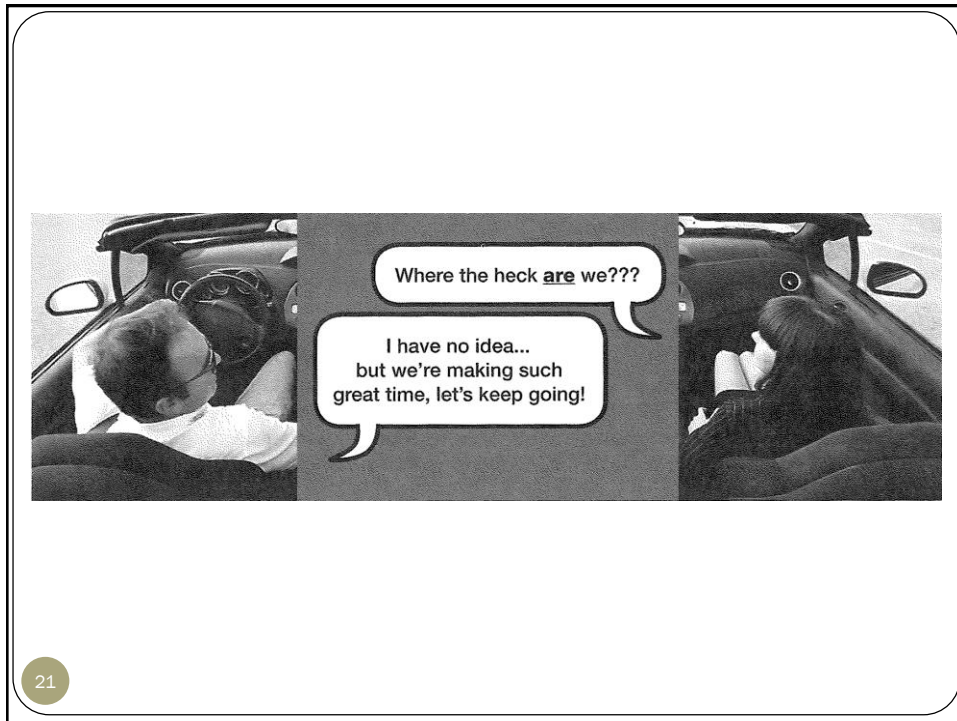


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# Impatience

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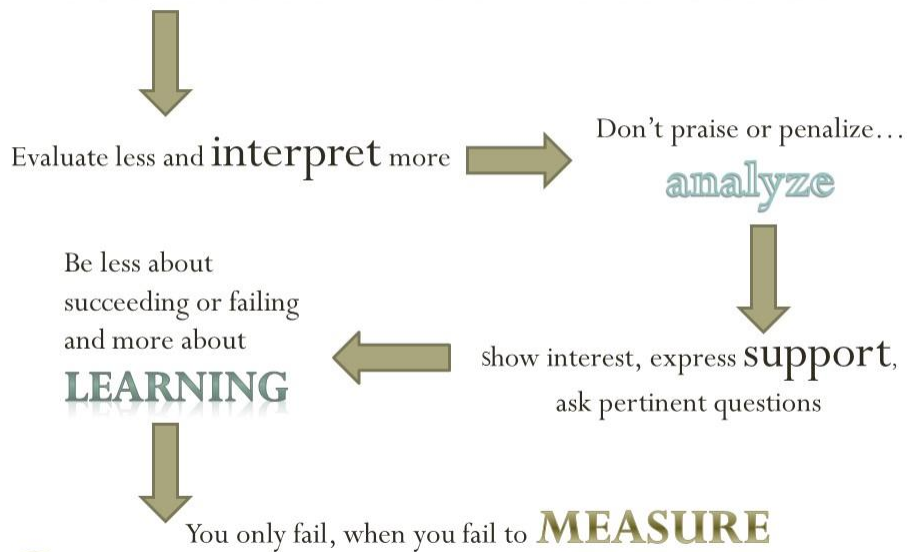


# Fear of Failure

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23

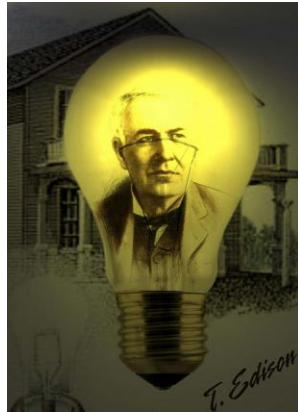
## CREATE A CULTURE OF RISK-TAKING



24

**“I have not failed, I just found 10,000 ways that won’t work”**

- Thomas Edison



25

**“Prediction is difficult, especially about the future”**

- Yogi Berra



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## AUDIENCE PARTICIPATION

Share the roadblocks at your  
Library which prevent staff  
engagement in your strategic plan

## Tools

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# Common Language

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## Strategic Plan Glossary of Terms

Goals	<ul style="list-style-type: none"> <li>• WORK to be done</li> <li>• Why we need to do the work</li> </ul>
Strategies	<ul style="list-style-type: none"> <li>• WORK to be done</li> <li>• What work needs to be accomplished</li> </ul>
Actions	<ul style="list-style-type: none"> <li>• WORK to be done</li> <li>• How the work is going to be accomplished</li> </ul>
Inputs	<ul style="list-style-type: none"> <li>• MEASUREMENT of the work (<b>resource</b> perspective)</li> <li>• The resources provided for the program or service</li> </ul>
Outputs	<ul style="list-style-type: none"> <li>• MEASUREMENT of the work (<b>operations</b> perspective)</li> <li>• The # of people attending, how often the program is presented</li> </ul>
Outcomes	<ul style="list-style-type: none"> <li>• MEASUREMENT of the work (<b>user</b> perspective)</li> <li>• Pre-planned accomplishments valued by the participant</li> </ul>
Impact	<ul style="list-style-type: none"> <li>• MEASUREMENT of the work (<b>community</b> perspective)</li> <li>• Institutional relevancy, changing citizen behavior</li> </ul>

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# Capacity

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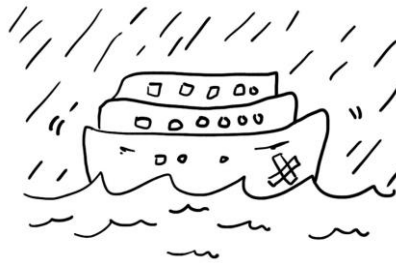
32





“Always plan ahead.  
It wasn’t raining when  
Noah built the ark”

-Richard Cushing



35

Capturing lessons in real time is more  
**efficient**  
than trying to re-create them after the fact



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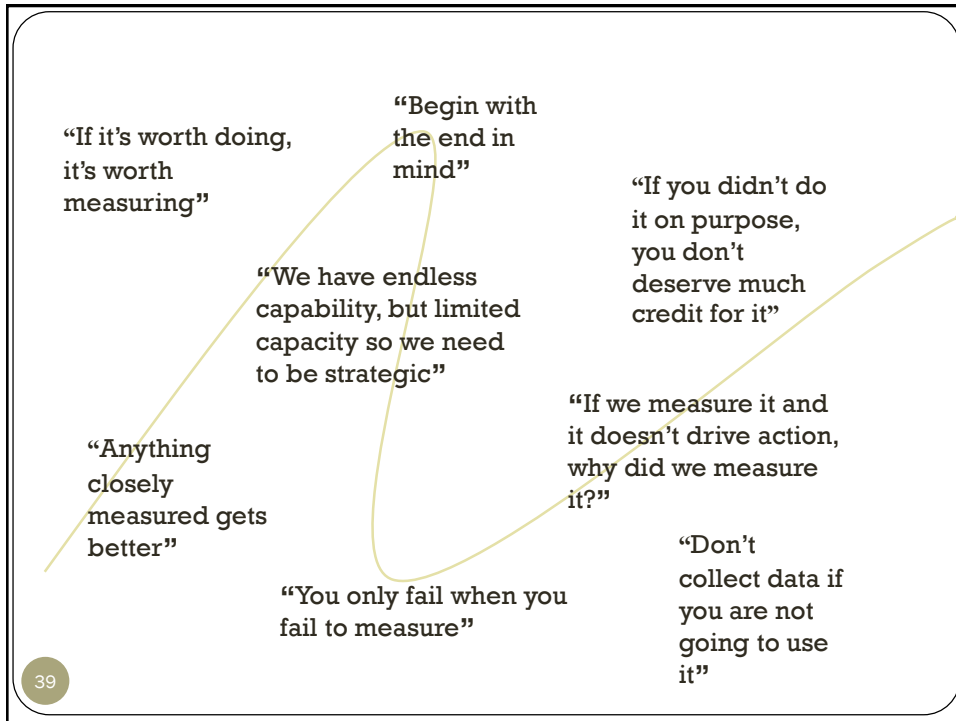
# Measurement

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# Service Plans

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# Purpose of a Service Plan

## For Staff

- Staff become participants in strategy, not spectators
- Offers a planning process focused on the end result
- Staff have a process for their ideas to be heard and acknowledged
- Staff learn data collection and analytical competency
- Creates clarity & fit-to-purpose

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## For the Library

- Analysis tool for development of services and programs
- Connects services and programs to the strategic plan
- Serves as a evaluation tool for program services
- Budgetary tool
- Employee involvement in strategy reduces managerial burden.



**\*\*DOWNLOAD & SAVE FORM BEFORE COMPLETING TO PREVENT LOSS OF DATA\*\***

### Service Plan

☐ 2017 ☐ 2018

Send completed form to: [serviceplans@indypl.org](mailto:serviceplans@indypl.org)

#### SECTION 1: REPORTING

SELECT A CATEGORY THAT THIS SERVICE PLAN BEST FITS:

☐ Program ☐ Collection ☐ Facility ☐ Marketing ☐ Service

STRATEGIC PLAN ACTION NUMBER MOST RELEVANT  
(SELECT ONE)

SERVICE PLAN TITLE

LIBRARY LOCATION

STAFF FACILITATOR

PARTNER (if applicable)

STATUS OF SERVICE PLAN ☐ REPEAT ☐ NEW

Repeat: Share any improvements you have made to the program or service.

"If you focus on change, you will get results"

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Page 1

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SECTION 2: ASSESSMENT

**COMMUNITY NEED**

What is the situation within your community that this service plan is addressing?

**TARGET AUDIENCE**

Who in your community is affected by this situation and could potentially benefit from this service plan?

**CONTENT DEVELOPMENT AND MARKETING**

How will you attract this target audience?

**PARTICIPATION PREDICTION**

Number of people in this target audience that will actually participate as a result of this service plan

"The odds for hitting your target go up dramatically when you aim at it"

Page 2

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SECTION 3: MEASUREMENT

LIST THE DESIRED ACCOMPLISHMENTS THAT WOULD DEMONSTRATE SUCCESS FOR THIS SERVICE PLAN

*
*
*
*
*
*

TURN THESE ACCOMPLISHMENTS INTO PERCENTAGES

*
*
*
*
*
*

THESE PERCENTAGES ARE YOUR DESIRED OUTCOMES FOR THIS SERVICE PLAN AND THEY ARE MEASURABLE

**CONTENT DESIGN CONSIDERATIONS:**

- Decide what content components are needed to accomplish your outcomes
- NOW IS THE TIME TO INCORPORATE THESE COMPONENTS INTO YOUR PROGRAM DESIGN.

LIST THE PROGRAM COMPONENTS THAT WILL MEASURE OUTCOMES

*
*
*
*
*
*

"While every outcome is an accomplishment, every accomplishment is not an outcome"

Page 3

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**SECTION 4: PLANNING**

DESCRIBE THE PROJECT

DESCRIBE HOW YOUR PROJECT WILL PROMOTE AND USE ORGANIZATIONAL RESOURCES  
(The materials collection, eResource collection, library cards or other services)

Please share your needs with the appropriate department well in advance of the project.

LIST THE PRINT NEEDS OF THE PROJECT (if applicable)

	Distribution Spots (e.g. in branch, fairs/festivals):	Quantity
• Posters		
• Flyers		
• Calendars		

DETERMINE THE SUPPORT YOU NEED FOR YOUR PROJECT AND DESCRIBE HERE

Name of Department	Describe Specific Needs
Human Resources	
Accounting	
Program Development	
IT	
Facilities	
Collection Management	
Volunteer Resources	
Communications	

LIST THE TECHNOLOGY NEEDS OF THE PROJECT (connectivity, peripherals, software builds, hardware)

	Need	Have
•	<input type="radio"/>	<input type="radio"/>
•	<input type="radio"/>	<input type="radio"/>
•	<input type="radio"/>	<input type="radio"/>
•	<input type="radio"/>	<input type="radio"/>

"It is incredibly easy to be very busy without being very effective"

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**SECTION 5: DIRECT COSTS**

(TOTAL ESTIMATED EXPENSES MUST EQUAL TOTAL ANTICIPATED FUNDING)

ESTIMATED EXPENSES			
Materials:	QUANTITY	COST PER	TOTAL
1.			0.00
2.			0.00
3.			0.00
4.			0.00
5.			0.00
6.			0.00
7.			0.00
8.			0.00
Presenter Fees:			
1.			0.00
2.			0.00
3.			0.00
4.			0.00
Printing (Foundation-funded only):			
1.			0.00
2.			0.00
3.			0.00
TOTAL ESTIMATED EXPENSES			\$ 0.00
ANTICIPATED FUND SOURCE			
1. OPERATING BUDGET			
2. GIFT FUND OR PETTY CASH			
3. LIBRARY FOUNDATION			
TOTAL ANTICIPATED FUNDING			\$ 0.00

**INDIRECT COSTS**

Your projected staff hours spent on this initiative including all planning and implementation of all staff in your agency.

# of hours	Staff Level	Cost	Total Cost
Planning			\$ 0.00
Implementation			\$ 0.00
Promotion			\$ 0.00
Evaluation			\$ 0.00
Total Indirect Costs			\$ 0.00

Staff Level Average Cost	
Page	\$6.00
Library Assistant	\$10.00
Public Service Associate	\$15.00
Librarian	\$20.00
Manager	\$21.00

"Quality is never an accident; it is always the result of intelligent effort"

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# Big Picture

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## TEN GOOD REASONS TO CREATE A SERVICE PLAN

1

Helps me plan for the entire year

2

Helps me prioritize my ideas and be selective

3

Helps me tailor my program to the needs of my community

4

Helps me focus on a target audience for marketing

5

Helps me establish desired results and measure success

6

Helps me plan for the budgetary needs of the program

7

Helps me analyze program performance

8

Helps me retool marginal programs and eliminate nonperformers

9

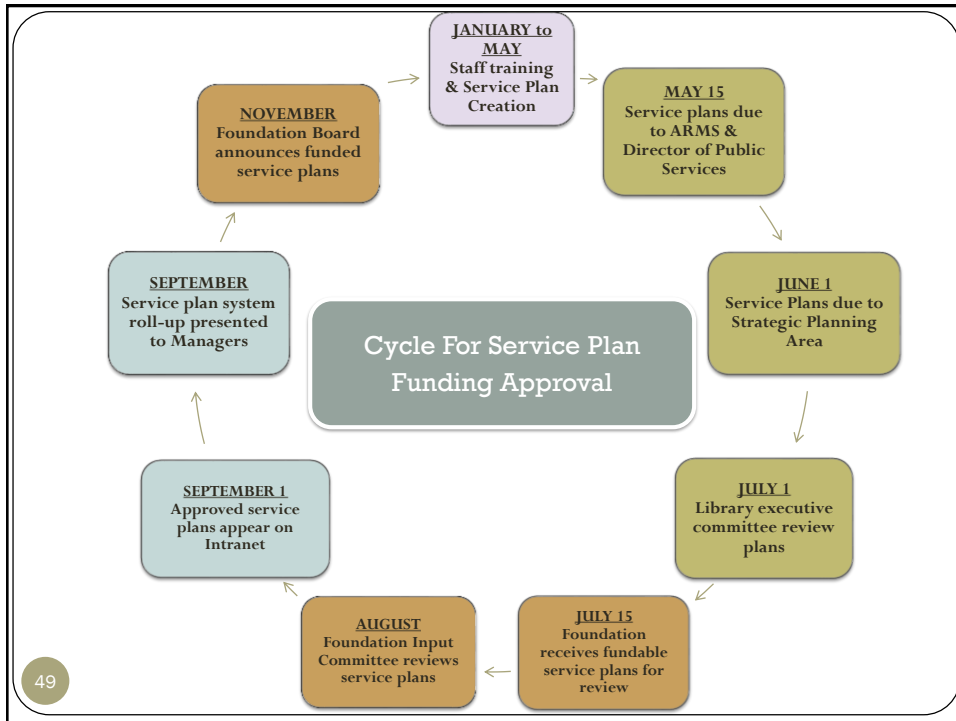
Helps me match personal growth with library performance

10

Helps me understand the contribution of my work to the success of the Library

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# Results

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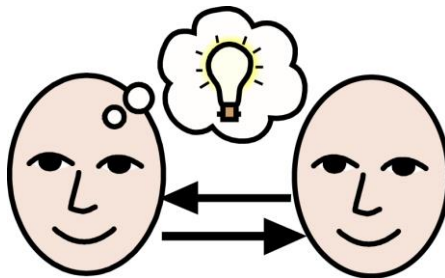
“When you have eliminated all which is impossible, Watson, then whatever remains, however improbable, **must be the truth**”

-Arthur Conan Doyle



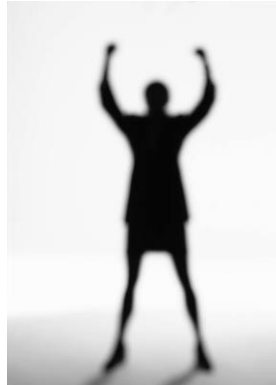
51

Shared data can be **meaningless**,  
but shared information is priceless



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**“The measure of success  
is not whether you have a tough problem to deal with,  
but whether it’s the same problem you had last year”**



-John Foster Dulles

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## **Service Plan 2017**

### **RESULTS PAGE**

This form must be submitted to [serviceplans@indypl.org](mailto:serviceplans@indypl.org) within 30 days after the project is completed or at the end by December 31 for ongoing projects.  
Thank you.

**SERVICE PLAN TITLE** \_\_\_\_\_

**BRANCH** \_\_\_\_\_

**OUTCOMES**

WHAT I HOPED TO ACCOMPLISH (list outcomes here)	WHAT WAS ACCOMPLISHED
•	
•	
•	
•	

**OUTPUTS**

Number of participants: \_\_\_\_\_

Number of times presented: \_\_\_\_\_

**DATE ONLINE PROGRAM STATISTICS SUBMITTED** \_\_\_\_\_

[http://intranet.imcpl.org/cgi-bin/pdastat\\_input.pl](http://intranet.imcpl.org/cgi-bin/pdastat_input.pl)

**USE OF VOLUNTEERS**

Number of volunteers: \_\_\_\_\_

Number of times: \_\_\_\_\_

**COST PER PARTICIPANT**

Total Expenses	# Of Participants	Cost Per Participant
(Direct costs only)	(Attending Audience)	

*"Shared data can be meaningless, but shared information is priceless"*

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**SECTION 3: MEASUREMENT**

LIST THE DESIRED ACCOMPLISHMENTS THAT WOULD DEMONSTRATE SUCCESS FOR THIS SERVICE PLAN

- 
- 
- 
- 
- 

TURN THESE ACCOMPLISHMENTS INTO PERCENTAGES

- 
- 
- 
- 
- 

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- 
- 
- 
- 
- 

"While every outcome is an accomplishment, every accomplishment is not an outcome"

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55

#224.16  
4.23

## Service Plan 2016

### RESULTS PAGE

This form must be submitted to **Chris Cairo, Strategic Planning and Assessment, LSC** within 30 days after the project is completed or at the end by December 31 for ongoing projects. Thank you.

**On the Road to Reading**

**Outreach**

**OUTCOMES**

WHAT I HOPED TO ACCOMPLISH (list outcomes here)	WHAT WAS ACCOMPLISHED
50% of programs will advance or enroll in Paths to QUALITY	12% of centers on PTQ Level 1 or 2 had advanced by May 2016*
100% of visits will expose children and providers to skills identified in the Foundations to the Indiana Academic Standards for Young Children and Paths to Quality	100% of visits exposed children/providers to skills identified in Foundation to Indiana Academic Standards for Young Children and PTQ
50% of providers served will utilize The Library beyond their monthly Itty Bitty Bookmobile visit	83% of providers use the Library beyond monthly ORR visit
100% of providers will say that they have used materials or suggested activities left behind by the librarian.	100% of providers incorporated literacy/learning resources and Library info into curriculum
90% of providers will indicate that they utilized Bunny Bag Books daily.	58% of providers shared Bunny Bag books with students daily**

**OUTPUTS**

Number of participants: 2007 \_\_\_\_

Number of times presented: 148 visited each month

**DATE ONLINE PROGRAM STATISTICS SUBMITTED** Ongoing

[http://intranet.imcpl.org/cgi-bin/pdastat\\_input.pl](http://intranet.imcpl.org/cgi-bin/pdastat_input.pl)

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#43.16  
1.08

## Service Plan 2016

### RESULTS PAGE

This form must be submitted to **Chris Cairo, Strategic Planning and Assessment, LSC** within 30 days after the project is completed or at the end by December 31 for ongoing projects.  
Thank you.

**SERVICE PLAN TITLE** Storytime

**BRANCH** East Washington

**OUTCOMES**


WHAT I HOPED TO ACCOMPLISH (list outcomes here)	WHAT WAS ACCOMPLISHED
• Engage families with the library	unknown
• Present two literacy skills at each program	Each program contained reading, singing and movement activities
• Leave behind at least one resource	Each daycare teacher had the book titles and the songs, fingerplays, etc
•	
•	

**OUTPUTS**  
 Number of participants: 975  
 Number of times presented: 3X/month  
**DATE ONLINE PROGRAM STATISTICS SUBMITTED** 1-31-17  
[http://intranet.imcpl.org/cgi-bin/pdastat\\_input.pl](http://intranet.imcpl.org/cgi-bin/pdastat_input.pl)

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# The Strategic Plan and Service Plans





**The Library**

**Goal 1**

Enrich Indianapolis' desire for personal growth and learning

taking action

**A. Strengthen the Library's contribution to formal education in Indianapolis**

**STRATEGY:**  
Ensure education administrators and faculty, including homeschools, are aware of Library services and see these services as value-added to their efforts

**ACTIONS:**  
 1-1 Continue participation as a lead institution in the Marion County Internet Library program by providing online databases for use by library patrons, faculty and students of Marion County schools  
 1-2 Target promotional materials for programs and services to educators, parents and students  
 1-3 Create opportunities to connect with homeschool educators by listening to and meeting their information needs  
 1-4 Identify opportunities to support schools in their digital journey with student training and compatible digital tools  
 1-5 Offer demo information for teachers and media specialists to introduce students to online Library services (databases, catalog)

**STRATEGY:**  
Be a strong participant in the movement to provide early learning experiences for Indianapolis' youngest children

**ACTIONS:**  
 1-6 Create opportunities to introduce preschool children to technology and literacy  
 1-7 Offer convenient, barrier-free access to Library materials for very young readers  
 1-8 Support the quality improvement efforts of local childcare providers  
 1-9 Target early learning resources to caregivers and parents

**STRATEGY:**  
Actively join community efforts to close educational achievement gaps at all levels

**ACTIONS:**  
 1-10 Promote Library resources that support completion of high school equivalency certification  
 1-11 Create curriculum-based content for visits by primary and secondary classes to the Library  
 1-12 Target schools who are underperforming and have the most need and create program partnerships  
 1-13 Be an active participant in educational enrichment activities at schools in every service area

**STRATEGY:**  
Enhance partnerships with institutions of higher education and provide support to Indiana teachers

6


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**A. Strengthen the Library's contribution to formal education in Indianapolis**

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60



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☐ 2017   ☐ 2018

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STATUS OF SERVICE PLAN   ☐ REPEAT   ☐ NEW

Repeat: Share any improvements you have made to the program or service.

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"If you focus on change, you will get results"

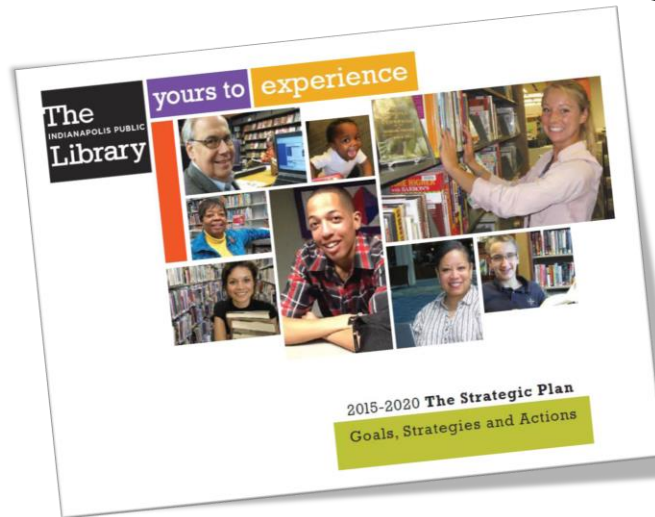
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Page 1

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# Celebration

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## 2016 STRATEGIC PLAN REPORT CARD

[www.indypl.org/strategicplan](http://www.indypl.org/strategicplan)

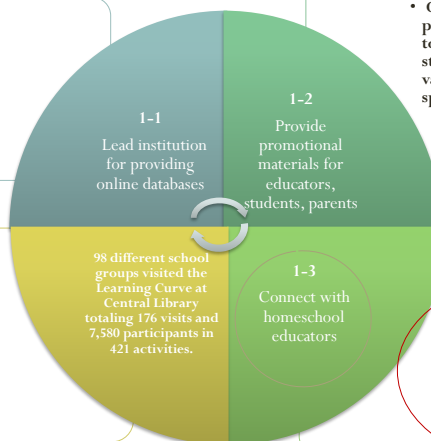
63

INTERNAL DOCUMENT

## School administrators and faculty including homeschools are aware of Library Services

- Maintained Marion County Internet Library for Eligible Libraries. 984,347 database retrievals in 2016. A 153% increase from 2015.

- Over 200,000 flyers were printed and distributed to parents, educators and students in 2016 for a variety of Library sponsored programs.




- 491 student from three K-1 classes visited the Infozone. 97% completed a lesson on coding & built their own robot.

- Franklin Rd offered programs for homeschooled teens geared to STEM skills, popular juvenile fiction and pop culture. 90% of the children returned for more than one session. 85% of attendees reported learning at least one new skill.

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**STRATEGY:**  
Be a welcoming, one-stop source for access to online government resources

**ACTIONS:**  
1-26 Provide staff training on new online government sites to be responsive to patron needs  
1-27 Require staff to be current and competent on government issues  
1-28 Improve communication to the public about government resources in partnership with providers

**STRATEGY:**  
Support the learning efforts of patrons wherever they are on the digital journey

**ACTIONS:**  
1-29 Increase computer classes at branches  
1-30 Continue Tinker Station demonstration and assistance with eReader devices  
1-31 Collect and analyze available data on adoption rates of new technology

**C. Help prepare residents for successful employment**

**STRATEGY:**  
Prepare useful resources for the Indianapolis workforce

**ACTIONS:**  
1-32 Build staff capacity to meet the needs of the diverse workforce  
1-33 Continue the library's commitment to provide resources to support employment  
1-34 Provide a job and career database for occupational research and skill development  
1-35 Offer skill building tutorials that teach web development and other marketable technology skills

**STRATEGY:**  
Partner with workforce readiness providers to create a strong network of support for workers

**ACTIONS:**  
1-36 Adapt Job Centers in branches to meet changing needs of the community  
1-37 Participate in community job fairs to market library resources


8

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## Offer useful resources for Indianapolis workforce


- Every public computer has an electronic bookmark to access web links to assist with employment issues.
- Displays and helpful bookmarks available in all branches for employment related issues.
- All staff are informed of local job fairs so they can alert their patrons.
- The Library offers free printing in the Job Centers.
- 512 related workforce books were purchased in 2016.

1-33  
Provide resources to support employment




- Three databases are the primary resources used for career development: Testing and Education Reference Center (185 unique uses) Universal Class and Career Transitions.
- All staff, including Job Center associates have been trained on the website.
- Career Transitions is popular with 945 users (64% increase) creating over 1,274 resumes (63% increase) and 502 applying for jobs (8% increase) from 2015.

1-34  
Provide job and career databases



- Four branches, Wayne, East Washington, Lawrence and Haughville offered job seeker training that help patrons create resumes, introduce email, teaches internet navigation, assist when filing for unemployment, and completing online template applications (not a Job Center Site)

1-35  
Offer skill building tutorials



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## The Library Report Card

### January, 2017

2016 by the numbers

**3,830,000** people visited us in 2016... that's one person every minute

**4** most visited locations: Central, Nora, Warren, Lawrence

**43,500** people walk into our branches or visit our website every day

**3 million** times last year, people accessed our wireless internet

Most circulated Fiction ebook: *Me Before You*, Jojo Moyes

Most circulated Non Fiction ebook: *The Life-changing Magic of Tidying Up: The Japanese art of decluttering and organizing*, Marie Kondo

Top eMusic title: Hamilton (Original Broadway Cast)

Top Fiction eAudiobook: *The Girl on the Train*, P. Hawkins

Most circulated children's book: *Double Down: Diary of a Wimpy Kid No. 11*, J. Kinney

**9,300** children have read-off \$222,000 worth of library card debt

**12,000** unique devices accessed Library Wi-Fi on average each week

**11.5** million visits to the library website

Top webpages visited: Front page, Children's page, Download-or-Stream page, Location & Hours page


**1,100** computer classes offered to **8,700** people

**12,000** programs were offered to over **280,000** attendees

Most popular database: Ancestry Library with **103,000** searches

Most popular database for school-age: Culture-grams with **58,500** articles viewed.

**44** schools belong to the Shared System; over **30,000** children benefit



**2016**

**Strategic Plan Data**

**244** SERVICE PLANS (33% growth from 2015)

**61%** GOAL 1

**22%** GOAL 2


**17%** GOALS 3 & 4

**36** STRATEGIES (77%) of all strategies

**67** ACTIONS (38%) of all actions


**4** MOST POPULAR STRATEGIES: Early Learning, Cultural, Reading & Digital Journey

**30%** RECEIVED LIBRARY FOUNDATION FUNDING



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**Expenditure Range \$30,000,000+**



Stars	LIBRARY	STATE	Population	Circulation per Capita	Visits per Capita	Program Attendance per Capita	Public Internet Computer Use per Capita	SCORE
*****	Cuyahoga County Public Library, Parma	OH	616,527	32	12.8	0.7	2.8	1655
*****	Public Library of Cincinnati & Hamilton County	OH	802,374	21.7	9.3	0.6	2.3	1247
*****	East Baton Rouge Parish, Baton Rouge	LA	445,227	5.5	5.4	0.8	4.4	1204
*****	Cleveland Public Library	OH	398,453	17.2	8.9	0.5	3.1	1198
*****	Seattle Public Library	WA	626,400	18.6	10.7	0.4	2.2	1126
*****	Columbus Metropolitan Library	OH	850,548	16.7	7.7	0.4	2.8	1064
****	Saint Louis County Library	MO	859,148	16.8	7.4	0.7	1.7	1044
****	San Francisco Public Library	CA	825,111	13.5	9	0.5	1.9	1005
****	King County Library System, Issaquah	WA	1,379,070	16	7.2	0.4	2.9	986
****	Santa Clara County Library, Los Gatos	CA	418,823	23.2	7.8	0.4	1.5	967
***	Multnomah County Library, Portland	OR	748,445	29.4	6.1	0.4	1.2	939
***	Denver Public Library	CO	634,619	15.5	6.9	0.6	1.5	898
***	Toledo—Lucas County Public Library	OH	441,815	13.1	6.7	0.4	2.2	872
***	Consolidated Library District No. 3, Independence	MO	762,446	12	5.9	0.6	1.1	768
***	Indianapolis—Marion County Public Library	IN	877,369	18.2	4.9	0.4	1.3	713

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## Survey

## Tips

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# Pitfalls



- Failing to understand strategy and analysis fast enough to teach others
- Imposing measurement and results before staff are adequately trained
- Not having a dedicated staff member to steward the strategic plan
- Not anticipating the fears and reluctance of staff to participate
- Failing to be sensitive to the heart versus the head

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# Envision Success



1. Begin creating a new culture with the end in mind
2. Start at the top with support from your Library Board
3. Design a strategic plan that gives clear direction to staff
4. Find the strategist in your organization to take the lead
5. Design a tool for staff to develop and measure their ideas
6. Continuously train staff
7. Make strategy a part of every meeting
8. Remind staff to plan and measure at every opportunity
9. Celebrate intentionally
10. Share results with stakeholders

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QUESTIONS? COMMENTS?



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# Getting Things Done

Shelley Walchak  
Director, Pine River Library

Wednesday, January 31, 12:00-1:00 Eastern/9:00-10:00 Pacific



# Thank You!

Webinar evaluation: [s.lrs.org/riplcop2](https://s.lrs.org/riplcop2)

