Using Data to Communicate with Stakeholders: Can you hear me now?

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Land Acknowledgement

We begin today by acknowledging that we work and live on the traditional territories of Indigenous Peoples.

We take 30 seconds to, if we can, look our a window, and to recognize their history, spirituality, culture, and stewardship of the land.

We are grateful to all Indigenous groups for their continuing commitment to protect the land and its resources and we are committed to reconciliation, partnership and enhanced understanding.
As a result of this session you will:

**View**  
Communication as a tool for stakeholders

**Consider**  
How data can support stakeholders achieve their goals

**Gained**  
A template to guide communication with stakeholders  
A few ideas
Purpose of data or measures

To answer three questions:

What?

So what?

Now what?
Data (should) drive decisions

What?

So what?

Now what?
Agenda

- Communication: 50
- Data: 30
- Ideas: 20
Start with the worksheets and definitions

**Stakeholders:** Individuals who can put a stake of support under your library or initiative, or a stake through the heart of it. They will support it if it helps them move their goals forward and fits their worldview. They will withdraw their support if another organization or initiative is more important for them or to accomplishing what they want to see happen. They may be part of a group that you view as stakeholders, but always remember each member of a group is an individual and may have very different goals than the rest of the group. Some members have more influence than other members.
COMMUNICATING WITH STAKEHOLDERS WITH DATA

SWEET SPOT OF SUCCESS

THOSE WITH A STAKE
T hose with a stake

Sweet Spot of Success
Individuals who can put a stake of support under the library and its services or can put a stake through the heart of it.
Some stakeholders have more influence than others.

A library member uses the library’s services. They are not necessarily stakeholders.

Stakeholders may be library members or may use the library.

But be clear, that when they are a user or member they are wearing their user hat; when they are a stakeholder they are wearing their stakeholder hat.

A stakeholder is an individual, with their own goals or “job to be done.” And, they have influence.
POLL
Starting Points
Poll #1 has 2 questions:

What type of organization do you work in?
1. Public library
2. College or university library
3. State library
4. Consortia
5. Did I miss your organization?

What’s your role with communicating with stakeholders?
1. All the time – I’m the CEO, Dean or Director
2. Much of the time – I’m in marketing or communications
3. Some of the time – I like statistics, measures and data so I get asked to do this
4. Rarely if ever…..but I can see this role headed my way.....
COMMUNICATING

SWEET SPOT OF SUCCESS

THOSE WITH A STAKE
We, as individuals, are interested in communication that:

- Is of interest to us
- Builds our understanding or
- Gives us insight that supports our ability to do something that is important to us
- Confirms our ideas

That enables us, even in little ways, to accomplish our goals – our job.
We communicate best when we understand the lens of those we are communicating with.
Rather than through the library lens

Are we communicating library processes rather than resident or member-facing experiences?

Are we communicating in terms that no longer fit today’s context?
The Context has shifted

FROM TRANSACTIONAL TO INTERACTION & ENGAGEMENT

FROM PHYSICAL TO PHYSICAL AND VIRTUAL: “PHYGITAL”

FROM LIBRARY-CENTRIC TO RESIDENTS OR COMMUNITY-FOCUSED
We can’t expect stakeholders to fully embrace this new context until we consistently use language meaningful for their lens.

Horseless Carriages

Car Phones

ATM’s or PTB

Chargex
The data may be brilliant

But is it communicating the message you want to convey?

<table>
<thead>
<tr>
<th>From</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Circulation</td>
<td>Borrowing</td>
</tr>
<tr>
<td>• Reference</td>
<td>Advisory; Consultations</td>
</tr>
<tr>
<td>• Gate Counts</td>
<td>Interactions</td>
</tr>
<tr>
<td>• Active Cardholders</td>
<td>People welcomed</td>
</tr>
<tr>
<td>• Customers</td>
<td>Study spaces used</td>
</tr>
<tr>
<td>• Databases</td>
<td>Membership Engagement</td>
</tr>
<tr>
<td>• Downloads</td>
<td>Members, residents, visitors</td>
</tr>
</tbody>
</table>

Proprietary e-content
Premium web content
Uses
Borrowed
Your stakeholders

• Board
• Staff

Elected and City or County Management Officials
Board Chair

• Very ambitious, successful entrepreneur
• Serves on two other boards; well-connected
• High energy
• This is their home and place of their business
• Wants the city or county to be known – and to take care of each other
Board member

• Recently retired from teaching
• Been on the board for 20 years
• Distressed about moves to digital books, magazines, media
• Wants more emphasis on reading and less on what she views as social services for the disenfranchised
Elected Official Board Member

- Into his 3rd term for his constituency
- His father was mayor for many years
- Is staunchly anti-big government - locally, provincially/state and national
- Has made it clear that he asked to be on the Board to ensure the Library’s budget is curtailed
- Very involved with the community service clubs
Staff

Some are:

- anxious about being in the building(s)
- protective of the library building and traditional programs
- may use technology extensively in their personal lives but have been are uncomfortable helping users with devices
Influential staff

Usually are those who:

• Are confident in who they are and what they do
• Advocate for other staff
• Readily and advisedly question management decisions
What do they have in common?

To communicate with you, they need to know:

• WIIFT
  • It fits for them
• That they can trust you
• That you are competent
• That you are committed
• That they won’t be embarrassed
What’s different for them?

Their jobs

They all have jobs to do – goals to meet

And they are different

Which means, they need different data
POLL

Data you now provide stakeholders
Poll #2 has one question

What’s your confidence that the library’s key stakeholders have the data they need to do their jobs?

1. High – very confident
2. Med – they probably have some of the right data
3. Low – not confident about this at all
4. ? – I honestly don’t know what you are talking about
Think about this as we work through the communication exercise.
Communication tool

Switch the starting point from:

HERE’S THE DATA WE HAVE

To

THIS WILL HELP YOU ACCOMPLISH YOUR GOALS AND DO YOUR JOB
## Understand their lens

### Topic - The Board

<table>
<thead>
<tr>
<th>Group &amp; Key Individuals in Group</th>
<th>What job do they have to do? What are their goals (or what do they want)?</th>
<th>What do they know now?</th>
<th>What do they need to know?</th>
<th>How does it impact their ability to do their job if they <em>don't</em> know?</th>
<th>What's your desired outcome with regards to them knowing?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Board</td>
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<tr>
<td>Elected Official(s) on Board</td>
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</tbody>
</table>

Considering all this:
1. WHAT data supports them in their role and what they want?
2. WHEN do they need this data?
3. HOW should this data be communicated - do certain members need a modified communication method?
### Worksheets for breakout discussions

#### The Board

<table>
<thead>
<tr>
<th>Group &amp; Key Individuals in Group</th>
<th>What job do they have to do? What are their goals (or what do they want)?</th>
<th>What do they know now?</th>
<th>What do they need to know?</th>
<th>How does it impact their ability to do their job if they don’t know?</th>
<th>What’s your desired outcome with regards to them knowing?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Board</td>
<td>Their role is to ensure: Financial stability CEO or Exec Director is fulfilling responsibilities (which they’ve set) Library is implementing strategies they set to be sustainable &amp; valuable To be proud of the library</td>
<td>What they experience as a library member – or not The budget Probably “circulation” and maybe what they’ve read or heard about libraries</td>
<td>How the budget works If the Library is on track with the budget Anything that will significantly impact the budget and why Broad and local trends and developments impacting the Library Library’s contribution to City, County or community solutions, goals and aspirations That the Library is modern and important to a broad percentage of voters</td>
<td>They focus on operations and services Decisions are ill-informed or emotionally driven</td>
<td>Their support and advocacy for the Library That they support changes you see must be introduced that are progressive, strategic and in the best interest of a community base or specific segment</td>
</tr>
<tr>
<td>Elected Official(s) on Board</td>
<td>They are to be a board member, bringing council’s &amp; constituency perspective to the board, BUT! They may see it as their job to keep the library’s budget as low as possible. They want their voters to be happy. That voters don’t want tax increases &amp; do want pools &amp; sports fields. What they experience(d) as a parent or library member, or not.</td>
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</tbody>
</table>

#### Considering all this:

1. **WHAT data supports them in their role and what they want?**
   - regular financial reports
   - service or program levels and the % of people using these – and why
   - data that is in some ways comparable to other organizations with which members are familiar

2. **WHEN do they need this data?**
   - quarterly, or focus on one service or program area/month

3. **HOW should this data be communicated - do certain members need a modified communication method?**
   - the board chair or elected officials may need to hear the data first, to bring them onside, and not blind-side or embarrass them
   - in language meaningful for them
### Topic - Staff

<table>
<thead>
<tr>
<th>GROUP &amp; KEY INDIVIDUALS IN GROUP</th>
<th>WHAT JOB DO THEY HAVE TO DO? WHAT ARE THEIR GOALS (OR WHAT DO THEY WANT)?</th>
<th>WHAT DO THEY KNOW NOW?</th>
<th>WHAT DO THEY NEED TO KNOW?</th>
<th>HOW DOES IT IMPACT THEIR ABILITY TO DO THEIR JOB IF THEY DON'T KNOW?</th>
<th>WHAT'S YOUR DESIRED OUTCOME WITH REGARDS TO THEM knowing?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Staff</strong></td>
<td>Fulfill their Library responsibilities.</td>
<td>They usually only know their work and those processes</td>
<td>They need to know how: What they do contributes to the Library's goals and reputation, and to the community (the neighbourhood, and then broader to the city or county). Broader and local trends and developments that may impact the Library, community and the work they do.</td>
<td>Duplication of effort or processes Loyalty to their unit, not the Library Fear Focus on work deficits rather than assets</td>
<td>They know they are respected Library is living its values towards its employees and is a great place to work Healthy collaborative progressive environment</td>
</tr>
<tr>
<td><strong>Influential Staff</strong> (union president? Stewards? Staff association chair?)</td>
<td>See above plus: They may feel a responsibility to represent staff to ensure fairness, equity, security To have a certain level of power and influence</td>
<td>See above plus: What other org's or libraries are doing in terms of staff security, pay and development</td>
<td>How pieces of the Library fit together, complement each other &amp; drive decisions</td>
<td>Look for the problems or hidden agendas Feel disconnected to Library and hesitant to be fully engaged</td>
<td>See above plus: Support organizational decisions</td>
</tr>
</tbody>
</table>

### Considering all this:
1. **WHAT** data supports them in their role and what they want?
2. **WHEN** do they need this data?
3. HOW should this data be communicated - do certain members need a modified communication method?
Groups 1 - 24 - work on the Board template
- What would you add to the type of data they need?
- When and how should they receive and discuss it?
- How does it – or does it – differ from data for the community?
- What language has your library changed? Or does it need to change?

Groups 25 – 20 – work on the Staff template
- What data do they need? We know it is much more operational than for the Board, but what type is most useful?
- When and how should they have this and discuss it?
Debrief

Board:
- What type of data?
- How does it – or does it differ from data for the community?

Staff:
- What data will help them – and management – do their jobs?
- When and how should it be provided and discussed?
COMMUNICATING

DATA

THOSE WITH A STAKE

SWEET SPOT OF SUCCESS
Data (should) drive decisions

What?

So what?

Now what?
Board

Realized we weren’t conveying:

• The transition from transactions to interactions
• The people factor - either staff work or resident usage and benefit

We were conveying a bit too much, without a summary
Brampton Library
every day, 7 days a week

- 5700 people thru our doors
- 8200 people to our website
- 13,700 digital & physical items borrowed
- 512 computers used
- 1500 wifi logons
- 80 new members
- 176 people at programs
<table>
<thead>
<tr>
<th>Customer Interactions</th>
<th>This year</th>
<th>Last year</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Visits:</strong></td>
<td></td>
<td></td>
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<tr>
<td>Into Branches</td>
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<tr>
<td>Virtually to Website</td>
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<tr>
<td>Total</td>
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<tr>
<td><strong>Answers &amp; Membership Updates:</strong></td>
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<tr>
<td>Addressing Information Questions</td>
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<tr>
<td>Welcoming new members</td>
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<td>Updating memberships</td>
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<tr>
<td>Total</td>
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<tr>
<td><strong>Loans:</strong></td>
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<tr>
<td>Physical Items</td>
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<td>Digital Items</td>
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<td>Total</td>
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<td><strong>Programs:</strong></td>
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<td>Presented</td>
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<tr>
<td>People Attending</td>
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<td><strong>Active memberships:</strong></td>
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<tr>
<td><strong>In-Branch Technology Use:</strong></td>
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<td>Workstations</td>
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<tr>
<td>Chromebooks</td>
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<tr>
<td>WIFI</td>
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<tr>
<td>Performance Indicator</td>
<td>2020</td>
<td>2019</td>
<td>2018</td>
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<tr>
<td>----------------------------------------------</td>
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<tr>
<td>Items Borrowed</td>
<td>xxxx</td>
<td>xxxx</td>
<td>xxxx</td>
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<tr>
<td>New Memberships</td>
<td>xxxx</td>
<td>xxxx</td>
<td>xxx</td>
</tr>
<tr>
<td>% of Population Active Members</td>
<td>xxx</td>
<td>xxx</td>
<td>xxx</td>
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<tr>
<td>Programs Delivered</td>
<td>xxxx</td>
<td>xxxx</td>
<td>xxx</td>
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<tr>
<td>Program Attendees</td>
<td>xxxx</td>
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<td>xxx</td>
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<tr>
<td>Neighborhood Branch Customer Visits</td>
<td>xxx</td>
<td>xxx</td>
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<tr>
<td>Virtual Branch Customer Visits</td>
<td>xxxx</td>
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<td>xxxx</td>
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<tr>
<td>Computer Uses</td>
<td>xxxx</td>
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<tr>
<td>Wireless Internet Uses</td>
<td>xxx</td>
<td>xxx</td>
<td>xxx</td>
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<tr>
<td>Questions Answered (To learn, to read, to solve problems)</td>
<td>xxx</td>
<td>xxx</td>
<td>xxx</td>
</tr>
</tbody>
</table>
Leverage data communications

Use as Board executive summary before the detailed report, and as a communique to volunteers and the community.
Ideas?
Data (should) drive decisions

What?

So what?

Now what?
Staff

Realized we were not acknowledging, reporting or celebrating large parts of their work or how it fit:

• Member registration or updates
• Device loans
• Member or customer interactions: “Can you help me...” “Where is...” “I need to....”
• Programs onsite vs. offsite

We also weren’t connecting programs or staff to the neighbourhoods they were working with
<table>
<thead>
<tr>
<th>Customer Activity</th>
<th>Branch Q3 2020</th>
<th>Branch Q3 2019</th>
<th>Branch % Change</th>
<th>Branch YTD</th>
<th>System Q3 2020</th>
<th>System Q3 2019</th>
<th>System % Change</th>
<th>System YTD</th>
</tr>
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<tbody>
<tr>
<td># Customers welcomed</td>
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<td>New members welcomed</td>
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<td>Membership accounts updated</td>
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<td>Items borrowed: books, physical AV</td>
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<td>Items borrowed: digital</td>
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<td>Total products we loaned</td>
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<td>Devices borrowed: Chromebooks</td>
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<td>Devices used: Express Stations</td>
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<td>Total devices they used</td>
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<td>Programs delivered in branch</td>
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<td>Programs delivered in community</td>
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<td>People @ branch programs</td>
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Branch Neighborhood Profiles

For Staff Programming & Service Decision Making and Training

III. Living in Four Corners

Education

With the knowledge of the area, Four Corners has an extensive school catchment area of 12,280 students. The catchment area includes both public and private schools with a total of 7,735 students who are closer to Four Corners than any other library branch. This includes public, private, and Catholic schools. Not included are the two French elementary Schools, Carrefour des jeunes and Ecole elementaire catholique Sainte-Jeanne d'Arc, and the Peel Alternative Secondary School which are located within Four Corners.

Five of the 37 schools in the area are walkable within 1 km. These walkable schools are:

- McHugh Public School (Public Elementary)
- Sir Winston Churchill Public School (Public Elementary)
- Rowntree Montessori Downtown Campus (Private Elementary)
- St. Mary Elementary School (Catholic Elementary)
- Cardinal Leger Secondary School (Catholic Secondary)

We count some schools that are outside the typical 3 km radius that defines Four Corners catchment area as these schools are closer to Four Corners than any other typical library branch. There are currently no post-secondary schools in the area.
Working with your data - Analyze

What does it all mean?
- Population Size
  - Increasing or decreasing?
- Demographics
  - Age of population
  - Families/seniors
- Household size
- Economics
  - Low income population
- Languages spoken

The new SouthWest branch has the second youngest demographic

Note that all languages less than 1% were amalgamated in “Other”.
Ideas?
POLL

Now, how are you finding this topic?
You’ve invested in:

- **Viewing**  
  Communication as a tool for stakeholders

- **Considering**  
  How data can support stakeholders achieve their goals

- **Gaining**  
  A template to guide stakeholder communication  
  A few ideas
Video follow-up

Focus on deepening your understanding of being a stakeholder

And

Apply the communication tool to City or County or State stakeholders: elected officials or senior staff

And

Talk a bit about the narrative or stories to bring your data to life
Thank you!

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