Index

3  —  Welcome - A Message from Scott
4  —  collectionHQ Investigates - Marketing In Public Libraries
7  —  Celebrating 21 Years of EBSM
8  —  Director Spotlight - Tania Sharpe, ON, Canada
9  —  Industry Insight - Using a Methodology
12 — Case Study - Angus Alive Increase Efficiencies with collectionHQ Scheduling Module
14 — Partner Focus - SOLUS

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Welcome to the latest issue of Directors’ Digest.

In this edition we celebrate 21 years of the Evidence Based Stock Management (EBSM) methodology by investigating the role of a methodology in public library management.

We also share some of our findings from discussion carried out at recent collectionHQ Forums about how libraries are using Marketing activities to attract new users, retain existing patrons, and improve collection performance.

As we approach the end of the fiscal year I am pleased to reflect on some of collectionHQ’s success stories from the past 12 months. Our Scheduling module has proven to be a vital tool in assuring quality and consistency of collection improvement activities. I’m also delighted to welcome more and more customers to our new Evidence-based Selection Planning (ESP) service which supports data-driven selection of current and pre-published titles to meet patron demand.

To find out more about either of these tools, please contact us at more.info@collectionhq.com or speak to your Account Manager.

Thanks for reading!

Scott

Scott Crawford
COLLECTIONHQ VICE PRESIDENT AND GENERAL MANAGER
INTRO
When budgets are tight and resources are limited, a marketing plan can be regarded as “nice to have” rather than an essential function in Public Libraries. Staff time is already stretched between carrying out collection maintenance tasks and serving patrons, so generating promotional displays or communicating with patrons via social media can easily become an afterthought. Nevertheless, more and more Public Library Directors understand the need for an effective marketing and promotional strategy to attract new users, retain existing patrons, and increase turnover. Planned well and implemented correctly, marketing activities can fit into the schedule of staff members and become part of their day to day tasks.

BENEFITS
Flexible: Marketing as a practice is vast and covers a wide range of channels. A common misconception about developing a marketing plan is that it must include all kinds of promotional activities, but while a diverse plan may look impressive, it can lead to mediocre campaigns if resourcing is inadequate. Instead, plan to experiment with 2 or 3 activities at a time until you find what works well for your library. Public Libraries are dynamic and your marketing plan should reflect this.

Audience Targeted: Public Libraries attract a diverse audience and marketing activities can be tailored to target different groups of patrons. Consider patron communications: while social media may be an effective tool to reach certain demographics, traditional mail via a library newsletter may be better suited to others. Similarly, each branch in your system may attract a different demographic and marketing campaigns can be amended at each branch to accommodate this.

Cost Effective: While marketing cannot be described as cost free – members of staff must be dedicated to the planning and execution of a successful marketing campaign – with some imagination, resources can be optimized by making use of marketing tools at little or no cost. Examples include posting news on social media, developing a set of style guidelines so that promotional posters can be created in house, and encouraging patrons to opt in to email notifications and newsletters.

Easy to Monitor: The most important part of any marketing activity is the evaluation of its success. There are a number of tools that can be used at no charge to monitor website visits and social media success, helping to better plan future campaigns based on learnings from past experiences. collectionHQ’s Marketing Module offers an extensive range of tools which allow customers to experiment with new collections and displays, then evaluate their performance.

EXAMPLES OF MARKETING IN PUBLIC LIBRARIES
At recent collectionHQ Forums the topic of “Marketing in Public Libraries” was discussed. Here are some examples of how collectionHQ customers are using marketing activities to promote their collection and develop patron interest in the library.
COLLECTIONHQ MARKETING MODULE

CollectionHQ’s Marketing Module enables customers to create promotional displays and experiment with new collections.

In particular, Top Charts has proven a popular choice among libraries by revealing the Top Items at the library and providing a personalized poster that can be printed off to accompany a display. Other libraries have experimented by using CollectionHQ to pull lower circulating titles that they feel are worthy of more patron interest into a promotional display to monitor the impact on circulation. CollectionHQ’s Experimental Purchase and Placement tools support this idea of trying new displays or collections and monitoring their success.

EVENTS

National events such as Summer Reading Challenge or National Library Day offer public libraries the opportunity to join in with social media trends and conversations across the country. Many libraries use the public interest generated by these events as an opportunity to attract new members or promote certain collections.

In addition to National Events, many public libraries host their own events from author book signings to children’s storytime. At Merton Libraries, U.K. pop-up libraries have been introduced at a variety of different locations across the borough to bring books to the community and encourage new library registration. Even though they may remain only for a short time at a venue they highlight to the public what a wide range of services their local library has to offer.

BLOG

Blogs provide the perfect platform to share news directly with patrons. Many public libraries use blogs to write reviews and announce upcoming library events. By enabling “shares” on blog pages, posts can be shared with a larger audience and potentially attract new users.

Alison Millar at Leeds Library, U.K. shared the success of her library’s blog ‘Leeds Reads’ where each librarian is invited to post their Top 10 titles from a particular genre or subject including jacket cover images http://leedsreads.net/. Alison’s example illustrates how blogs can also be used to introduce members of staff to patrons and develop the sense of a library community.

SOCIAL MEDIA

Like a blog, social media allows libraries to communicate directly with patrons and share news in real time. As with all marketing activities, plans should be put in place to monitor social media success and evaluate which posts have been most engaging. Most social media platforms offer free reports to track engagement with certain content: from links to a blog, to photos.
To encourage social media interaction, Carla Laughton, Assistant Librarian at Barnsley Libraries, U.K., has described how staff use Twitter Polls. Librarians select 4 books of a certain genre or theme and followers are asked to vote for their favourite which is later announced by Tweet.

Hashtags, a metadata used to search for particular topic discussions on social media, can be assigned to campaigns to monitor how engaged people are with that topic.

At Doncaster Library in the U.K., the hashtag #libbookbytes is used on social media to “tag” short book reviews in 8 words or less. Debs Marshall, Systems and Resources Office at the library explained: “We post these twice a week on a Wednesday and Sunday at 6.30pm so that if anyone is looking for them they will know when they are due out. The actual reviews come from a variety of sources, members of the public write reviews that go on to our website and also give us reviews that we display in our Central Library.”

PROMOTIONAL DISPLAYS AND CHARTS

In addition to collectionHQ Top Charts, many libraries have introduced “Book of the Week” charts where librarians will post a fun photo on social media with their top circulating book from that week, create a display, or write a blog.

Blackpool Libraries, U.K. decided at the turn of 2015 to introduce a “Book of the Year” chart where 20 library assistants selected the best book they had read that year. To create some surprises, the publication date didn’t have to be 2015 and the book could be Fiction or Non-Fiction. Library Assistant, Kari Singleton, shared the results of this campaign: “This proved to be a really popular post and gained a lot of engagement on all of our social media sites, we also saw that a number of people enquired about the books that we had recommended online.

PR

Some libraries are fortunate to have the opportunity to work with local press to promote library services. At Salford Libraries, U.K., Carol Prettyman-Lowth submits content each week to the local newspaper. Features are planned in advance to link with special events and include a book review either from a staff member or patron, book recommendations, library news, and a library quiz.

EVALUATION

So how do you decide which marketing activities work for your library?

Introducing steps that measure the impact of your efforts are vital to ensure that they have achieved a suitable return on investment and to help with effective planning of future campaigns. Many libraries reported measuring success by monitoring the number of new registered users, survey responses, an increase in footfall, and the number of new users who continue to frequent the library after the campaign.

Another useful way to monitor marketing success is to introduce experimental marketing campaigns to establish a supposed demand for a new collection or to decide whether to buy more of a certain collection. Measurement of experimental marketing campaigns will show one of three results: 1) there is a high demand for those items and you should invest more in that collection, 2) you are adequately stocked in that collection and don’t need to purchase more items, 3) there is little or no demand for that collection in which case you should not invest in that collection and consider moving existing items to a new location.

Overall, developing a marketing plan that is within your budget and can be monitored regularly need not be a daunting task, but instead a way for staff to use creativity and imagination to enhance relationships with patrons and keep the library current.
CELEBRATING 21 YEARS OF EBSM

Evidence Based Stock Management (EBSM) is a complete library collection performance improvement methodology which supports librarians in making collection management more effective, more patron focused, less wasteful, and more measurable.

collectionHQ helps librarians put the EBSM methodology into practice to save time, save money and improve collection performance.

FIND OUT MORE AT WWW.COLLECTIONHQ.COM/EBSM21
When did you first decide that you wanted to work in public libraries?

I have had a lifelong love affair with Public Libraries but didn’t consider working in one until I moved to Chatham-Kent in the early 90’s. My career before that time was with an academic library.

What do you enjoy most about your role as Chief Librarian at Chatham-Kent Public Library?

I enjoy working with the staff and the Library Board in setting the direction for Library Service in Chatham-Kent. I find it extremely gratifying to see people enjoying the benefits and using all the services of the library. My favourite thing to do is to wander in our branches and see folks happily browsing our collections, chatting with our staff or relaxing in our space.

Who are the most popular authors at your library at the moment?

Our top 5 authors are:
- James Patterson
- Nora Roberts
- Debbie Macomber
- Stuart Woods
- Danielle Steel

Top Children’s author is Canadian, Robert Munsch

What do you consider to be the 3 main challenges facing library Directors today?

They are:
- Promoting library services to people from all walks of life.
- Keeping up with the varied and increased demands for services, such as balancing virtual service demands and the continued need for the physical product.
- Continuing with staff training so that they are able to assist people confidently and efficiently.

Over recent years, the library world has been influenced by a number of factors. What do you consider to be the key trends shaping the library world as we know it?

Key trends in the library world are definitely the increased demand for virtual services. Libraries are still balancing the budget and determining the appropriate spending levels for physical versus virtual collections.

Another trend is the expectation of a quick turn around and delivery time for resources. Library users have learned quickly how to maximize library usage through self-service holds, renewals and check outs. They also expect the library to be more efficient and manage the collections and delivery of collections more effectively to serve them better.

How is your library using ‘Big Data’ to improve collection performance?

Staff have been excited and delighted to use ‘Big Data’! With the increased information staff are able to assess collections faster and more accurately. It has enabled CKPL to identify dead and grubby collections efficiently, as well as note gaps in our collection and where we are overstocked. The use of Big Data has meant that our collections are looking fresher and are seeing increased usage.

What projects are you most excited about working on over the next year?

CKPL will be publishing our Strategic Plan which will set our direction and service priorities for the next five years. In addition, the library has purchased another digital service, Flipster, to complement Zinio and iPads have been purchased to loan to seniors for workshops. CKPL is also continuing to expand upon its STEM program offerings with the introduction of three 3D printers.

Finally, I am excited to continue to work with the Municipal Council and Library Board to improve the Library’s budget and visibility in the community, increase opportunities for donations to the Library and increase statistical and qualitative reporting in the quarterly board reports.
A methodology can be defined as a set of guidelines or “methods” that can be applied to “a particular area of study or activity” to achieve a defined goal.\(^1\)

**WHERE IS A METHODOLOGY USED?**

A methodology can be used in a variety of practices from research to project management and can be tailored depending on the field.

Consider the use of a methodology in a new business venture. Numerous methodologies have been recommended by experts over the years since each venture need not follow the same “path” to achieve business goals.\(^2\) Perhaps one of the best known and universally used methodologies is ‘Six Sigma’, designed in the 1980s to improve processes through the use of data analysis and goal definition.\(^3\)

A successful methodology will incorporate the same basic foundations and must be:

- **Tested** – Practised over time and proven to be effective.
- **Easy to monitor** – monitored at regular intervals to ensure proper practice.
- **Measurable** – results must be recorded to evaluate the impact of a methodology.

Incorporating a methodology in any practice that adheres to the foundations listed above can in turn bring about a number of benefits.

1. Support during the planning phase of a project.
2. Provide a framework to keep a project on track.
3. Can be shared among all parties involved – from frontline staff to senior management - to ensure that tasks are carried out efficiently and risk is reduced.

**METHODOLOGIES IN PUBLIC LIBRARIES**

Considering the benefits a methodology can bring, it is clear to see how the practice can be applied to public libraries.

The most prominent methodology in the public library world for the last 20 years is the Evidence Based Stock Management (EBSM) methodology: a complete library collection performance improvement methodology, which analyses historic and current information about collection use, to help librarians save time and money, improve collection performance and align supply with local demand.

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\(^1\)http://www.oxforddictionaries.com/definition/english/methodology  
\(^2\)http://blog.mpmm.com/why-use-a-methodology  
\(^3\)http://www.isixsigma.com/new-to-six-sigma/getting-started/what-six-sigma
EBSM Origins

Scotland, U.K., in the mid-1990s: libraries were focusing more on anticipating patron demand and measuring collection performance. Faced with inadequate data and a lack of suitable guidelines, Public Librarian, George Kerr, recognized the need for a framework that could be followed to support collection management, selection planning, and item movement. As a result, the EBSM methodology was introduced to support collection development on an operational and strategic level to ultimately reach the goal of improved collection performance.

Based around a number of Key Performance Indicators (KPIs) and a comprehensive toolset, EBSM allows librarians to monitor and measure its success.

THE EBSM KPIs

The five EBSM KPIs universally describe what a patron expects from a public library collection.

1. Grubby Items: Patrons should not be expected to borrow items which are physically unattractive.
2. Dead items: Patrons should not be expected to wade through hundreds of dormant items in the search for useful or desirable choices.
3. Popular Author Supply: Patrons have an expectation of finding a good selection of publications by favourite authors on shelves at all times.
4. Overstocked Subjects: Large Quantities of unused and unwanted Non-Fiction items in any subject area is counterproductive to patron satisfaction and convenience.
5. Understocked Subjects: Supply should always try to match demand in Non-Fiction Subjects.

EBSM TODAY

The EBSM methodology continues to evolve to support developments in the library world and to help make library management more efficient than ever with a comprehensive toolset and Action Plans supported by collectionHQ.

Recent additions to the toolset include Holds Request Analysis and Evidence-based Selection Planning (ESP).
CONCLUSION
A proven methodology can help library management to use information in a structured way to provide direction.

Structure is enabled via the EBSM framework, meaning that everyone in the library system is working towards the same goal and direction is provided via the action plans – clear unambiguous advice on what to do at the shelf to improve the profile of the collection – item by item, collection by collection, location by location.

For more information on how to implement the EBSM methodology at your library, please contact more.info@collectionhq.com or visit www.collectionhq.com/ebsm.
ANGUS ALIVE INCREASE EFFICIENCIES WITH COLLECTIONHQ SCHEDULING MODULE

THE BACKGROUND
Angus Alive in the North of Scotland runs a 7 branch library service with 2 mobile libraries and serves a population of over 110,000. The team has been using collectionHQ since 2012 and rolled out the Scheduling Module shortly after it was introduced in March 2015.

THE CHALLENGE
Prior to the introduction of the collectionHQ Scheduling Module, managing tasks across several branches and involving all staff in the use of collectionHQ had been difficult. Thanks to forward thinking management, a calendar had been introduced from the start using Microsoft Publisher which was rolled out by Bibliographic Services Co-ordinator, Vicky Fraser. Vicky reports that although tasks could be planned, Publisher was not intuitive and was not designed for the specific tasks involved in collection management. Vicky explained: “You couldn’t fit everything into the calendar entries so for example with ‘Top Charts’, all we could enter as a task was ‘Top Charts’ - we couldn’t specify which chart in particular to run.” As a result, the tasks which should have been run on a regular basis were not and staff lacked reminders to help them keep on top of tasks. Publisher was also time consuming for management staff like Vicky who explained that some libraries had issues opening the files. In these situations, she would send the scheduled tasks as a PDF which doubled her workload.

ROLL OUT
The roll out of the Scheduling Module started with a visit from the library’s collectionHQ Account Manager who spent time with Vicky and her assistant to explain the full potential of the tool and to show them how to set up schedules. Vicky then created a plan of what frequency to set tasks and who to assign them to before entering this information into her collectionHQ schedule; a process which Vicky completed over just two afternoons.

At first some staff were a little overwhelmed with the amount of detail included in the scheduled tasks, however the ease of use and clear direction provided by each task supported a successful roll out of the Scheduling tool to staff who discovered that the specific information provided actually saved them time and has helped them to get on with tasks proactively. With just an introductory training session and by inviting staff along to training sessions hosted by the Account Manager, Scheduling has become an integral part of the staffs’ workflow at Angus Alive.

THE SOLUTION
In March 2015, the new Scheduling Module was introduced to the collectionHQ toolset which allows library staff to coordinate all collection management and development tasks centrally and monitor the progress of these actions. It didn’t take long for Vicky and the team at Angus to get on board with the new tool and enjoy the benefits!

THE RESULT
INCREASED PRODUCTIVITY
With the collectionHQ Scheduling Module, Vicky can assign tasks to individuals who each receive a reminder of when their task is due and is expected to tick a box when the task is complete. These reminders help staff to keep on top of their to-dos and have supported an increase in productivity.
The ability to include more detail in each task and assign tasks directly to frontline staff has also widened the variety of collectionHQ tools being used. For example, where before Vicky could not specify which Top Chart staff had to run, she can now detail whether to run a Top Chart for Juvenile or for Adult Fiction and as a result she has seen a rise in these reports being used by staff. She explains: “Since April when we introduced the Scheduling Module I can see that Top Charts for Non-Fiction and Fiction have been run 193 times as opposed to 5 before we started scheduling tasks with collectionHQ.”

Vicky has also been able to include tasks to remind staff to check Performance which encourages them to monitor how their hard work is paying off, whether the titles selected are successful, and where room for improvement lies. As a result, collectionHQ’s Popular Author Summary has been signed into 130 times since April whereas before only 2 or 3 staff members would regularly access this information.

**TIME SAVINGS**
The implementation of the Scheduling tool at the library has saved time for Vicky and for branch staff, both senior and frontline.

Previously Vicky had to accompany each task entry in Publisher with what was sometimes a 2 page procedure document describing exactly which tool to run, where to find it in collectionHQ and which collection to use the tool for. Now she can include more detail in the calendar entry outlining the precise task to carry out which staff can click on to take them straight into the tool they need to use. The ease of use with schedules has allowed Vicky to involve frontline staff more in activities as she can set tasks specifically for branch staff such as stock maintenance, freeing up senior library assistants to focus on the tasks required of them.

Because of this feature, Vicky has been able to successfully roll out a large scale weeding project of the library’s Non-Fiction collection. She explains: “I have been able to set very specific weeding tasks for over the next 6 months to support our Non-Fiction weeding project. In each task I have been able to include the specific Dewey range to be weeded each month. The Scheduling tool has been a God send for that, I don’t think we could have coped so easily if we were using Publisher.”

Monitoring progress and task completion has also become much more efficient and effective as a result of using the collectionHQ Scheduling Module. Vicky can now see at a glance which tasks have been completed and receives an email at the end of each time period outlining who has not completed tasks which she can follow up accordingly. This allows Vicky more time to focus on some larger scale projects.

**STAFF EMPOWERMENT**
When asked about staff buy in, Vicky mentioned some obstacles were met at first when some staff felt overwhelmed by the detail in each scheduled task. But involving staff in training and setting up the reminders has helped staff to see how much the schedule supports them in their job. Vicky explained that staff “love” the tool and they especially like that they can click on the task reminder and check a box when complete.

The ability to assign tasks directly to frontline staff in particular gives staff a sense of responsibility and allows them to work proactively.

To ensure that staff members keep using the schedules as they should be, Vicky continues to monitor use and offer training where required. The ability to monitor the library service as a whole has allowed Vicky to identify any issues with how certain libraries are doing things or where they are using different processes to the other branches. Vicky can use this insight to ensure that libraries are working in the same way as much as possible which helps to create a central system and build on team spirit.

**THE FUTURE**
Vicky is delighted with the results that her library has achieved thanks to the Scheduling Module so far and would like to see those results continue to improve. It is her goal to put collectionHQ at the forefront of everyone’s mind and she regards the Scheduling Module as the tool which will support that.

With increased use of the tool and a wider variety of collectionHQ tools being used as a result, Vicky expects to see a rise not only in use but in the performance of the library’s collection.
SOLUS, BASED IN GLASGOW, SCOTLAND, OFFERS DYNAMIC SOLUTIONS TO HELP LIBRARIES MAXIMIZE PHYSICAL AND DIGITAL COLLECTIONS FOR PATRONS.

SOLUS’ solutions have been helping libraries across the U.K. since 2012 and more recently in Australia and New Zealand.

WE CAUGHT UP WITH NEIL WISHART, CEO AT SOLUS:

Thanks for chatting with us, Neil. Can you tell us a little about SOLUS’ key products?

SOLUS has a fairly diverse product range but at the core of every product is content discovery.

SOLUS takes more of a retail approach to library service marketing and digital content discovery by positioning and promoting physical and digital stock and resources on a range of devices. From a Library App on the patron’s personal device(s), to hardware in the library: interactive signage, digital tables, gadget bars, interactive end panels and self-service.

Public libraries face the challenge of keeping up with an ever changing landscape. How does SOLUS help with this?

The explosion in digital content, personal digital devices and user connectivity presents a real challenge to libraries. Libraries need to transform their facilities but more so, they need to make their key asset, their collections, both digitally discoverable and engaging. We can help with digital engagement.

SOLUS can also provide unique products like www.librarytreasures.com to reward younger visitors to the library by giving them a fun App game experience that requires them to visit the library frequently.
What lies ahead for SOLUS in the coming year?

We will continue to refine the product line up and are excited by the potential for the Virtual Reality Library and Collection. A VR explosion is coming and rather than being another threat to libraries, let’s see if we can make it an opportunity. We are also researching the North American market and considering options for a potential market launch later in 2016 - watch this space!

**collectionHQ and SOLUS Announcement**

We are excited to announce the first SOLUS & collectionHQ integration which will allow collectionHQ libraries to take advantage of SOLUS’ new Inventory Mobile App. The App will provide libraries with significant efficiencies and collectionHQ libraries will be able to update their LMS/ILS automatically via the App while working with collectionHQ Action Plans.

To find out more about the Inventory Mobile App, please contact SOLUS at info@sol.us.
ESP — Evidence-based Selection Planning — brings the art of Baker & Taylor’s collection development expertise together with the SCIENCE of collectionHQ’s data analytics, to create a decision support system integrated with Title Source 360 to equip your library with the information to select the right titles and quantities, for the right locations.

Find out more at www.esp@collectionhq.com | www.collectionhq.com/esp