### Measuring for Success

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INFO VIEW

## **Measuring for Success**

Two SLA task forces are taking action to establish benchmarks for professional development and membership diversification.

BY BRENT MAI, SLA PRESIDENT



Wow! SLA 2012 is now one for the record books, and what an outstanding conference it was! Special thanks go to Cindy Hill and her team on the Conference Advisory Council for leading the planning process, to the division planners who put together 250-plus continuing education sessions and networking events designed to support the professional development needs of SLA members, and to the many other volunteers who helped SLA fulfill its mission to strengthen its members through learning and networking initiatives. Bravo! Bravo!

This issue of Information Outlook focuses on metrics, so I'll begin by providing some metrics of success for SLA 2012. There were almost 3,500 attendees in Chicago, and the number of those who paid to attend the full conference was up 20 percent over SLA 2011 in Philadelphia. This is a significant indicator that SLA members continue to find value in conference content and, furthermore, that more members are economically able to attend. More than 200 companies showcased their latest offerings at the INFO-EXPO, the premier exhibition of information management products and services

SLA's success, however, is not measured solely by its annual conference. As Gary Labranche of the Association for Corporate Growth pointed out during the leadership orientation session in Chicago, professional associations like SLA provide more educational opportunities than all colleges and universities combined. But with SLA chapters dispersed around the globe, it is difficult to know what learning and networking initiatives are taking place throughout our association without monitoring more than 150 unit Websites, discussion lists, blogs, and social media sites.

To facilitate sharing of this information, an association-wide calendar is being made available that will make Another of the board's strategic agenda items is to grow SLA by diversifying our membership. But in order to know whether this objective is being achieved, we must know who our members are. What industries do we represent? What work environments do we represent? What work environments do we represent, and how long have we been working in these professions? What educational backgrounds are represented among our members? To what other organizations do we belong?

If we know the answers to these questions, SLA leaders can make better decisions about what our members need to support their professional development. A presidential task force led by Kimberly Silk is developing a list

Measuring one's performance is instrumental in demonstrating success, both personally and professionally. SLA has two core values that relate to measuring success: to add qualitative and quantitative value and to deliver measurable results.

it easier for both members and nonmembers to see what opportunities are available on a given day in any part of SLA's global organization. This project builds on the efforts of Operation Vitality (led by former board member Daniel Lee), which has brought a unified technology platform to our units over the last two years. One of your board's strategic goals for 2012-2014 is to foster 24/7/365 continuing education opportunities. This new calendar will showcase what your association is doing for members and will be a visible indicator of whether the board is fulfilling this strategic goal.

of questions that will be used to gather the information needed to support this type of decision making. The answers to these questions can be used as a benchmark with which to measure our success at diversifying our membership.

### **Establishing Standards**

In many professions, there are mandates to engage in lifelong learning and professional development. These mandates are often linked to licensure of some kind, requiring participation in designated learning activities to maintain credibility as a professional.

This type of a professional development regime is rooted in the traditional concept of a professional as autonomous and self-regulating, with specialized expertise and a responsibility to the public to maintain particular standards in this expertise.

SLA is not, at this time, a certification-issuing professional association. We do, however, offer certificates that demonstrate proficiency in a handfull of subject areas, notably copyright and knowledge management. We also provide, for those members who find them professionally useful, certificates of completion for continuing education courses sponsored by SLA.

But the diversity of our membership makes it difficult to establish a uniform set of standards against which information professionals can measure themselves. The SLA Competencies, while they are not exactly metrics with which we can compare one member to another, are used by many members to define job parameters and set goals for performance evaluations. Under the leadership of past president Anne Caputo, a task force is updating the SLA Competencies and expects to complete its final report by the end of the year.

Measuring one's performance is instrumental in demonstrating success, both personally and professionally. SLA has two core values that relate to measuring success. One is to add qualitative and quantitative value to information services and products; the other is to deliver measurable results in the information economy and in our organizations.

This issue of Information Outlook features three articles by expert authors on the subject of measuring for success. Constance Ard discusses using metrics to communicate value; Martha Haswell outlines how to use benchmarking to improve performance; and Steve Hiller dovetails information service metrics with the goals of the overall organization. Their collective wisdom will give you a broader understanding of the framework by which you can measure your professional success. Enjoy! **SLA** 



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# Metrics for Special Libraries

#### FOREWORD BY STUART HALES, EDITOR, INFORMATION OUTLOOK

hat if you measured the performance of your library or information center, and nobody in senior management paid any attention to your results?

A few years ago, two students at Harvard Business School interviewed several people who donate significant sums of money—collectively, about \$50 million per year—to charity. These donors all worked in the finance and investment fields and thus were familiar with, and advocates of, performance measurement. The students reasoned that because their subjects were passionate about gathering data and using it to make objective business decisions, they would welcome such information about the charities they supported.

To their surprise, fewer than 20 percent of the donors expressed interest in receiving better data about nonprofits. The others were skeptical of its value or even opposed to measuring charities' performance. Typical of such reactions was this one, from a managing director at Morgan Stanley: "Once I've gotten beyond an assurance of efficiency that the organization is not running a deficit—and as long as the staff can articulate that they are meeting their goal, I don't apply the same rigor."

Puzzled by their findings, the students began interviewing institutional funders, nonprofit executives, and industry analysts to gain more insight. They concluded that the objections to receiving performance information demonstrate that measurements, in and of themselves, are of limited impact. "Performance measurement proponents need to go beyond the theoretical value of measurement," they wrote. "They need to change fundamentally the way people think about and give to nonprofits" (Cunningham and Ricks 2004).

### Supporting the Overall Mission

This message applies as well to information professionals, who must change the way their organizations' leaders think about libraries. That mandate infuses this issue's three theme articles, which focus on the need for libraries to show how they support the overall mission of their parent organizations.

In "What Are We Measuring, and Does It Matter?" Steve Hiller recounts the history of library metrics and particularly their evolution from "counts" of volumes, budgets and users to measures of value and outcomes. He discusses the impact of this evolution on both corporate and academic libraries, noting that the former typically are better integrated into the planning infrastructure of their parent organizations and more likely to be able to demonstrate their contributions to organizational success. He concludes his article by stating that librarians should recruit organizational management and the user community to help develop value metrics so that all three groups better understand and recognize the difference the library makes.

"Do value metrics matter?" he asks.

"Yes, they do. Value metrics not only measure what is critical for organizational success, they also show those outside the library our vision for services and our commitment to change."

Many information professionals, however, find they must put metrics to more basic uses, namely defending their staffing and funding levels. Martha Haswell, in "Benchmarking: A Powerful Management Tool," explains that metrics developed for these reactive purposes can also be used proactively and strategically to help position libraries as value centers within organizations. Specifically, she notes that two of the most common questions her firm answers when performing benchmark studies for corporate libraries are "What are the best ways to demonstrate library quality to senior management?" and "Where can we improve effectiveness or improve efficiency?"

Benchmarking studies conducted by Haswell's firm have found that the percentage of potential library users who are actual users has increased over the years, from 17.5 percent in 2003 to 37 percent in 2011. This metric helps demonstrate the value of libraries and information centers and positions them as need-to-have resources rather than nice-to-have services.

The goal of positioning the library can be furthered by using qualitative as well as quantitative analyses, as Constance Ard argues in "Beyond Metrics: The Value of the Information Center." What Ard calls "the nuances of information



services" make it difficult to take a onesize-fits-all approach to using metrics to demonstrate value, so she recommends using a framework defined by six simple questions: who, what, where, when, why and how.

Answering these questions, however, is only part of the process—information professionals must also package and communicate the results. "While the CFO may want to see just numbers, graphs and charts, a CEO will want to tell a story that demonstrates the positive impact of information services on the bottom line," she writes. "Qualitative value is much easier to share in a story than quantitative value, so reporting methods that combine the two may be the ideal solution." In addition to the theme articles, Debbie Schachter's "Info Business" column also addresses metrics and value. Schachter posits that research in areas such as human resources can lead to strategies and tactics that librarians can use to help measure and communicate their value.

"Can you evaluate and communicate the value of your service in a similar manner as other departments in your organization?" she asks. "Will this help senior management understand what you are contributing to the bottom line?"

The key lesson for information professionals may be that the purpose of using metrics is to demonstrate that the library makes a difference. As the two Harvard students noted in their study analysis, "In order to be interested in measurement, donors would need to believe that there is a substantive *difference* among organizations. In other words, it is important to track performance if and only if you expect to find that one organization is better than another."

Can you afford *not* to show that your library or information center is better and, even more important, that it delivers value?

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METRICS FOR SPECIAL LIBRARIES

# What Are We Measuring, and Does It Matter?

VALUE HAS REPLACED SIZE AS THE PREFERRED LIBRARY METRIC, AND VALUE ULTIMATELY LIES IN SUPPORTING THE PARENT ORGANIZATION'S MISSION.

BY STEVE HILLER, MLS, MA

we libraries exist in a vacuum, accountable only to themselves. There is always a larger context for assessing library quality, that is, what and how well does the library contribute to achieving the overall goals of the parent constituencies." (Sarah Pritchard, "Determining Quality in Academic Libraries," 1996)

What makes a good library? For many years, library "goodness" was defined by size (of the budget, collections, staff, facilities, and so on), access, availability, and efficiency. Today, the focus is on value—that is, "How much good does this library do?"

Libraries need to demonstrate their value to customers and stakeholders. To do so, they must answer the following questions:

- What do we know about our communities to provide services and resources to make them successful?
- How do we measure our contribution(s) to user and organizational success?
- What do our stakeholders need to understand to provide the resources needed for a successful library?

### A Little Metrics History

Determining value is difficult. It is much easier to count things, which is why library statistics historically have focused on numbers. As the modern library developed in the 19th century, volumes, annual acquisitions, budgets, and registered users were counted. But problems often arose with the consistency of the counts, and some librarians began to question whether volume counts were a useful means of measuring library quality.

Otis Robinson, a librarian at the University of Rochester, captured the essence of these questions when he observed in 1876, "It is as if excellence were in numbers alone. How many volumes? This is always the question; never [h]ow much and how well do you use what you have?" Robinson did not propose a method for determining library value, but he understood that counting played little or no role in such a process. "... ("The number of books has very little to do with their educational value," he wrote. "Take chemistry, geology, almost any science—ten good new books may be worth more than a whole case twenty-five years old." (Robinson 1876)

James Thayer Gerould, library director at the University of Minnesota and later at Princeton, was among the first to discuss the practical value of comparative library data. In his seminal 1906 article in *Library Journal*, he noted that progressive librarians ask the following questions:

- · Is this method the best?
- · Is our practice, in this particular,

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adapted to secure the most effective administration?

 Are we up to the standard set by similar institutions of our class?

"These questions are of the most fundamental type," he wrote, "and upon the success with which we answer them depends much of the success of our administration." (Gerould 1906)

Gerould thought that collecting statistics in the following categories would prove helpful in administering a library: facilities, collections, finances, staff, salaries, ordering and processing, cataloging, collection use, reference transactions, and departmental libraries. He began collecting and publishing data in 1907 from a select group of academic research libraries, a practice that continued (after his retirement) until 1962, when the Association of Research Libraries (ARL) took over the collection, ompilation, analysis, and distribution of statistics for its membership.

Gerould clearly advocated for comparing data between institutions, primarily to discover and compare besi other libraries. But although he worked with a relatively small, voluntary group of research libraries, Gerould had difficulty coming up with a standard set of consistent data. In the end, he was able to collect information only on collection size/annual acquisitions, staffing, and budgets, and even then there were corrections, missed data, and copious footnotes explaining inconsistencies.

Gerould's data comprise the oldest comparative statistics among academic libraries, and they are usually labeled "inputs" and "library-centric metrics." But is this really the case? We don't know much about the specific expectations (stated or unstated) that institutions had for their libraries at that time but it is reasonable to assume these would have included facilities for housing collections and for students and faculty to work, collections for teaching, learning and research, and efficiencies related to library funding. While these don't get at outcomes (e.g., what they enabled students and faculty to achieve) or value, they are metrics that an institution would see as supporting its mission.

### **Metrics that Matter**

During the past 50 years, more systematic planning processes have been developed in both the commercial and nonprofit sectors, and these have exerted a powerful and growing impact on the choice and value of library metrics. A focus on user outcomes, the availability of online and Internet resources, and increased stress on institutional and organizational finances have also begun to factor into the equation.

These trends have resulted in a shift toward metrics that measure value rather than size. As Alexander Astin noted in 1991. "Institutional assessment efforts should not be concerned about valuing what can be measured. but instead about measuring what is valued." Martha Kyrillidou echoed this sentiment in 1998, writing "What is easy to measure is not necessarily what is desirable to measure. It is always tempting to set goals based on the data that are gathered, rather than developing a data-gathering system linked to assessing progress towards meeting established goals."

This trend has been especially pronounced in corporate libraries. Corporate libraries, because they have had to demonstrate their value to the organization to secure funding and support, are generally well integrated into their organizational planning infrastructure. Whether through billable hours, chargebacks, or activity-based budgets, corporate special libraries have documented their value to their organization.

As competition has grown from Internet-based resources and outsourcers, special libraries have also had to demonstrate that they are cost effective in comparison with these new competitors. Joe Matthews, in his 2002 book, *The Bottom Line: Determining* and Communicating the Value of the Special Library, listed several questions that organizational management would see as critical to the library's ability to demonstrate its contribution to orga-

### METRICS TERMINOLOGY

- **Inputs** are resources that contribute to the development and delivery of resources and services.
- Outputs are resources and services produced, and their use.
- Processes are activities that turn inputs into outputs.
- Outcomes are the effects of the library on the individual and community.
- Metrics are verifiable quantitative and qualitative measures used to evaluate the performance of the library in achieving its objectives.

nizational success. These questions include the following:

- How does the library save money for the organization?
- How does the library save employee time and increase productivity?
- What information does the library provide that cannot be obtained elsewhere?
- Does the library provide information that prevents legal problems?
- Does the library provide accurate, consistent and friendly service?

Matthews advised special libraries to use a balanced scorecard approach because it will assist librarians in "identifying what measures are important" and because it "supports the presentation of these measures in a cogent and understandable form for the management team of a larger organization." This approach would be especially useful if the organization already uses the balanced scorecard or a similar organizational performance model.

The questions Matthews posed reflect a move away from inputs and outputs as measures of library quality and a focus instead on individual and organizational outcomes. This emphasis on determining the value of special libraries to the parent organization has generated useful research on economic benefits and user impact. Don King and his associates, for example, have used contingent valuation techniques to arrive at dollars and time saved by libraries for their organizations and employees compared to alternatives.

While there have been successful efforts to determine library value at the organizational level, they continue to be problematic for broader benchmarking, even when comparing similar organizations. Value metrics tend to be "local" due to differences in data definition and organizational missions and objectives.

#### Metrics in Academic Libraries

Academic institutions especially research universities, have only recently focused on better defining their institutional missions and learning outcomes. Their efforts to develop outcomes-based metrics have generally been motivated by pressure from external bodies, such as political entities, governing boards, accrediting organizations, and foundations. Accrediting agencies, for example, have moved away from inputs and outputs in program and institutional evaluation to focus on outcomes. The onus now lies with the institutions to demonstrate how they meet outcomesbased accreditation standards.

For academic libraries, the trend toward aligning metrics with organizational missions and goals is being driven by changes in accreditation and the use of metric-driven allocation formulas. These changes, especially in programmatic accreditation, mean that no longer are evaluators concerned with inputs such as the number of library volumes and journal subscriptions and the size of the budget and staff. Instead, they want to know how the library contributes to student learning and success within the mission of, say, the engineering program.

Institutional accreditation has moved in the same direction. No longer do any of the regional accrediting agencies have a separate library standard; library evaluation is now integrated with other academic programs that support teaching and learning. Libraries need to be aligned with the mission and goals of the institution, and their metrics must demonstrate their contribution(s) to student success and learning.

The Association of College and Research Libraries (ACRL) has played a key role in promulgating the use of metrics that focus on outcomes. The ACRL Information Literacy Competency Standards for Higher Education, released in 2000, were designed as institutional standards rather than library standards. ACRL also commissioned an excellent study by Megan Oakleaf, The Value of Academic Libraries (2010), to help librarians understand how the library advances the missions of the larger organization. Oakleaf's work discusses specific methods for evaluating how the library affects the institution's mission in 10 areas, and while it focuses on academic libraries, it reviews relevant literature for all library types (including special libraries) and is a must-read for anyone interested in library value.

The ACRL Standards for Libraries in Higher Education (2011) reinforce the need for libraries to align their metrics with institutional ones. For example, the standard titled "Institutional Effectiveness" includes the following performance indicators:

- The library defines and measures outcomes in the context of institutional mission;
- The library develops outcomes that are aligned with institutional, departmental and student affairs outcomes;
- The library develops outcomes that are aligned with accreditation guidelines for the institution;
- The library contributes to student recruitment, retention, time to degree, and academic success; and
- The library communicates with the campus community to highlight its value in the educational mission and in institutional effectiveness.

The Association of Research Libraries

has worked with its membership to develop new measures that move away from a focus on print collections and instead incorporate e-resource usage, customer satisfaction surveys, and value metrics. ARL is a major participant in the LibValue project, which is designed to develop methods and measures that demonstrate library value in different settings. Some of the initial LibValue research has been completed, and the results are being presented and published. (LibValue also offers a searchable database of library value and ROI literature that contains more than 900 references.) Another ARL initiative, the Library Scorecard, uses the balanced scorecard organizational performance model as a way of better integrating planning, outcomes and metrics.

Changes in higher education funding models have created additional pressure to identify and use metrics to allocate budget monies at academic institutions. Activity-based budgeting (ABB) is employed in a growing number of universities where the primary set of allocation measures is related to student enrollment. ABB also taxes academic programs at a certain rate to fund both academic and non-academic support services, such as libraries. However, in most cases, the universities have not developed metrics for evaluating library value, and funding allocations are based on previous years and the current financial situation.

### Value Metrics: Whose Job is it?

So, who should develop metrics to evaluate library value? The short answer is that no one group should do it. This process should be a joint venture that involves organizational management and leadership, the library, and the user community, as follows:

- Management needs to set expectations for the organization and delineate the library's role.
- The members of the user community must articulate what they need to be successful in their work and the

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advanced access tools that are emerging in a post-Google world. Our users and organizations will soon have too much access and not enough context. Indeed, it's the classic "best of times, worst of times." As more and more of the corpus of historical and current print, audio and video content becomes accessible through digitization, the content fire hose will demand higher-order skills—in all employees, not just information professionals.

Many of us, and our colleagues, are vested in the traditions, environment, rules and processes of today. Yet we are entering a period of transformational and disruptive change at a faster pace than even that of the last few decades. To thrive, we'll need to adapt and use our critical thinking skills and values to question the change, adjust the sails, and invest in our own development. How do we do that?

### Keep the Goal in Mind

The best way to adapt to disruptive and transformational change is to always keep the goal in mind. What are the goals related to these social and collaborative technology changes in our industry, sector, library, or learning context?

First, we must ask ourselves—about each and every new technology opportunity—the following questions:

- Does this tool help us prepare our colleagues for the world they are encountering, in a scalable fashion?
- Can we play with this tool to better understand its potential?
- Can we ensure that this tool is worth adding to our pilots and trials to see if it shows potential for improving learning and teaching?
- Can we delay judgment until we make a professional assessment of the potential and risks?
- Does this tool support lifelong learning, collaboration, and social skills and perspectives that people will need to be successful in the community and workplace of 2025?
- Will the world be a better place with this tool?

- Does the "social glue" (the relationships and skills that bind) get better through the adoption and use of this tool?
- Are we creating a more tolerant, open and engaging society or are we risking too many negative consequences and greater divisiveness?
- What impact will this tool have on our institutional culture?
- Does this tool support the best of society—the world where new discoveries, inventions and creations are widely made, disseminated, enioved and used?
- Will this tool support greater progress toward a more perfect world?
- What are the inherent risks of using this tool, and how do we mitigate those risks? As information professionals, what is our best advice?

In addition to these technology-related queries, there are other types of questions we should be regularly asking within our institutions and our professional organizations and conferences. These kinds of questions can focus us in challenging times.

- How can we create amazing experiences every day for our users?
- How can we help our clients ask better questions?
- How can we make our libraries invaluable and irreplaceable in our communities?
- How can we nurture abundant curiosity?

Questions like these can guide our thinking, help us do extraordinary things, and prepare us to meet the future. These questions paint a vision of the future that is aligned with our goals and values; they allow us to create the future rather than just have it happen to us and our clients. Libraryland would be a happier place, and we'd frame our challenges better, if we used this approach more often.

We can make a choice to merely stay afloat, or we can ask questions and actively seek to create the kind of future we want. So, what questions are you asking? What questions do you want to be asking? **SLA** 

# What Are We Measuring, and Does It Matter?

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value of the library to their success.

 The library must demonstrate that it is efficient and effective in meeting the expectations of the organization and the needs of users. The library should also develop value metrics that are aligned with organizational planning and user needs.

Finally, do value metrics matter? Yes, they do. Value metrics not only measure what is critical for organizational success, they also show those outside the library our vision for services and our commitment to change. **SLA** 

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# Benchmarking: A Powerful Management Tool

BENCHMARKING CAN BE USED REACTIVELY, PROACTIVELY OR STRATEGICALLY TO HELP INFORMATION PROFESSIONALS POSITION THEIR LIBRARIES FOR GREATER SUCCESS.

BY MARTHA HASWELL, MIS

n today's tough economy, libraries are under increasing pressure to deliver value while holding down or reducing costs. All too often, librarians find themselves in the position of either justifying their budgets or figuring out where to make cuts with minimal damage to services and resources. In either situation, one of the most effective management tools librarians can utilize is benchmarking.

Benchmarking enables information professionals to measure and compare the cost efficiency and overall effectiveness of their library against libraries serving their competitors or peers. For higher performers in benchmarking studies, the results can be used to demonstrate the library's value to senior management; for lower performers, the results can be used to identify gaps and make needed improvements to bring the library back into line.

Over the past 10 years, my employer, Best Practices, LLC, has conducted five benchmarking studies for corporate libraries in some of the world's leading companies. Typically, information professionals considering library benchmarking have similar initial questions about its goals, uses, limitations, trends, and benefits. This article will address some of the most common questions we hear.

## What motivates libraries to engage in benchmarking?

In our experience, benchmarking is most often driven by the senior management group to which the library reports. Management wants to ensure that corporate functions (including the library) are meeting the company's needs as effectively and efficiently as possible. Although management commissions the study, library staff typically participate actively in benchmarking and welcome the opportunity to learn from their peers.

In some cases, library staff commission benchmarking studies directly. In these cases, benchmarking can be a

MARTHA HASWELL is senior research associate at Best Practices, LLC (www.bestin-class.com/), which conducts more than 20 different types of benchmark research for Fortune 500 companies in all industries and regions. She worked in corporate libraries for 15 years before joining Best Practices 10 years ago. She holds an MS in Information Science from the University of North Carolina at Chapel Hill. She can be contacted at mhaswell@best-in-class.com. defensive tactic to justify staffing or funding levels or an offensive effort to demonstrate superior performance to senior management.

### Don't libraries already have their own metrics?

As a rule, yes. The libraries we benchmark typically keep internal metrics on the number of user transactions and the volume of information resources used. These internal metrics are invaluable in managing a library, but they are not sufficient for influencing senior management's thinking on library value or funding. Benchmarking, in contrast, provides objective, external metrics that can be used to evaluate how well a library is performing compared to libraries in similar organizations.

### What key metrics are used in library benchmarking today?

Because different libraries have different missions and serve different populations at different organizations, it is rarely useful to compare sizebased metrics, such as the number of holdings, number of staff, or amount of space. Libraries need metrics that translate well regardless of library or company size or location. In this regard, the three most powerful metrics are the following:

· Budget per library user, which stan-

dardizes cost comparisons across libraries;

- Number of users per library FTE (full-time equivalent employee), which standardizes comparisons of staff size; and
- Percentage of potential library users who are actual users, which measures outreach effectiveness.

## Are there any new metrics that libraries are beginning to use?

As the workplace continues to globalize, one new metric that companies are starting to value is the number of hours per day that library staff are available to assist users. Providing extended access can demonstrate value to senior management in a global company, and a few libraries with locations in multiple regions are now able to make staff available to employees 24 hours a day. These libraries are the exception, but in a recent study of 43 corporate libraries, we found that 70 percent could assist employees at least 10 hours a day (only a quarter were working the traditional 8-9 hour schedule).

Given tight budgets and high costs for specialized resources, another useful new metric is the percentage of e-content funding contributed by other departments. Libraries increasingly are asking user groups to contribute to resource costs, and many of them are having success with this approach. In a recent study, for example, 71 percent of libraries reported receiving assistance to purchase e-content. This evidence provides leverage for information professionals who want to maximize the purchasing power of library budgets.

### How are libraries using data from benchmarking studies?

Savvy information professionals are using benchmarking results to manage their libraries more strategically and make senior management aware of areas where they are leading (or lagging) the pack. Among the most frequent uses of benchmarking data are defending budgets or head counts, identifying areas for improvement, eliminating services or resources that don't fulfill a strategic need, keeping up with new technologies and methods, and identifying best practices to adopt.

For example, senior management at one company commissioned a benchmarking study in the belief that its large library might be overstaffed and overfunded. The study revealed, however, that based on the number of users served, the library was understaffed and underfunded. In addition, the library offered more services and was open more hours than many of its competitors.

## What common questions does benchmarking answer?

The 12 most common questions we answer through library benchmarking are the following:

- Is our budget in line with libraries at other companies?
- Do we have the right level of staff to serve our user base?
- Where can we increase effectiveness or improve efficiency?
- · Do we have the right mix of services?
- Where can we make budget cuts with the smallest negative impact?
- Are we funded from the right sources?
- Should we be charging users for services or resources?
- Are we keeping pace with new technologies?
- What, if anything, should we be outsourcing?
- What are the best ways to demonstrate library quality to senior management?
- What best practices are others using that could help our performance if we adopted them?
- What key trends should we be following?

### Can metrics for large libraries be applied to a small library?

Yes. Two techniques in data analysis are used to ensure that benchmarking results are relevant to all libraries in a study, regardless of size: standardization and segmentation.

Standardization involves creating and comparing meaningful ratios. For example, it's interesting to know that the average number of library FTEs is 12.5, but that metric alone will not tell you whether a library with three FTEs is understaffed. A more meaningful comparison is the number of end users supported per library FTE. Using this example, if the benchmark average is 834 users per FTE, a library supporting 1,000 users per FTE would be comparatively understaffed, while one supporting 500 would be overstaffed. Data sets can also be segmented into groups of libraries that are similar in size, thereby allowing any library to compare itself to the most applicable segment.

### What are some potential pitfalls of using benchmarking metrics?

Resource metrics (number of people, number of journals, and so on) don't translate well across libraries and are rarely used in our studies today for identifying performance gaps. Metrics around processes and services are more useful for making comparisons.

Caution should also be taken when comparing individual metrics directly to the averages for a group of libraries that is dissimilar in size, function, scope, industry, etc. The averages for dissimilar companies provide good general, directional information, but won't show you what your real gaps are.

A third potential pitfall stems from misinterpreting gap analysis data. For example, if data show that a library is spending much less than its peers, management might see that as a good sign, yet it may indicate that information resources are inadequate to effectively support the company's employees.

Insufficiently defining processes and terms is another potential pitfall. For comparisons to be meaningful, clear, complete definitions are essential.

### What is a "gap analysis"?

In benchmarking, a gap analysis is a method used to identify and measure performance differences between one study participant and the other participants in the study. The analysis points out the extent of the differences, identifies the likely reasons, and suggests

a path for making improvements (if improvements are indicated).

Figure 1 illustrates a cost gap between the benchmark average and one of the participating libraries, identified as "YOUR LIBRARY." The data indicate that the highlighted library is spending 54 percent more than average on a per-user basis. The analysis suggests that several factors could be causing the gap—insufficient marketing, higher acquisition costs, or user access hurdles. "YOUR LIBRARY" should investigate these factors and make appropriate adjustments.

Another method of conducting a gap analysis is comparing your current benchmarking results to past results. Comparing your own benchmarks over time lets you assess the impact of changes you have made and evaluate the effectiveness of any process improvements. Some companies go through this exercise annually as part of a continuous improvement program.

### What data trends in libraries have you observed over time?

We've identified a number of data trends in our library benchmarking over the past 10 years. For the most part, these trends have been driven by the migration of information resources in corporate libraries from print to electronic formats.

With the adoption of electronic formats, libraries have extended access to their holdings to many employees who previously were unable to use library resources because they were not within close proximity. Today, any employee with a computer can use the library. This change has doubled the percentage of potential library users who have become actual users, thereby producing economies of scale that have brought down costs and improved staff utilization (see Figure 2).

Another impact of the transition to e-resources has been an increase in the ratio of professional to administrative staff. Electronic access has reduced the need for such activities as circulation, shelving, and journal routing, allowing libraries to eliminate administrative positions that handled those tasks and reallocate funds to professional positions that require a degree in library or information science. The result is that, today, only about 19 percent of library staff are administrative employees.

Two additional changes that are being driven by the emergence of e-resources are increases in the ratio of budget dollars per library FTE and increases in the amount of funding that libraries are receiving from other departments to help pay for e-content. Figure 2 illustrates these and some other key metrics trends we have observed across benchmarking studies completed in 2003, 2007 and 2011. marking is a powerful management tool information professionals can use to help them navigate their libraries through economic turbulence. Savvy librarians use benchmarking reactively to justify budget or staffing levels, proactively to evaluate the comparative effectiveness and efficiency of their operations, and strategically to win continued support from senior management. Benchmarking helps library leaders identify performance gaps, gives them a rationale for the differences, and suggests a path to improvement that, if followed, can help ensure their organizations survive and thrive regardless of the economic climate. SLA

Figures 1 and 2 illustrate that bench-



#### Figure 2

| Metric   | 2003      | 2007      | 2011      |
|--|-----------|-----------|-----------|
| % of potential users who are actual users      | 17.5%     | 27%       | 37%       |
| # of users supported per library FTE 173       | 492       | 834       |           |
| Budget \$ per library user                     | \$1,380   | \$700     | \$405     |
| Budget \$ per library FTE                      | \$175,000 | \$252,000 | \$338,000 |
| % of budget for purchasing e-resources         | 40%       | 48%       | 49%       |
| % of budget for purchasing hard copy resour    | rces 13%  | 8%        | 5%        |
| % of libraries receiving some e-content funds  | S         |           |           |
| from other departments                         | n/a       | 59%       | 71%       |
| Average hours of staff availability per weekda | iy n/a    | 9         | 11.6      |
| SOURCE: Best Practices, LLC                    |           |           |           |

### **Beyond Metrics: The Value of the Information Center** Ard, Constance *Information Outlook;* Sep/Oct 2012; 16, 5; ProQuest pg. 16

METRICS FOR SPECIAL LIBRARIES

# Beyond Metrics: The Value of the Information Center

INFORMATION PROFESSIONALS MUST GET AWAY FROM COUNTING AND MEASURING AND DEMONSTRATE THE DIFFERENCE THAT INFORMATION SERVICES MAKE TO THEIR ORGANIZATION.

BY CONSTANCE ARD, MLIS

decade after the release of The High Cost of Not Finding Information (Feldman and Sherman 2001) by the International Data Corporation, there is still a struggle to measure library services and report their impact in a meaningful manner. Calls for alignment and demands for new metrics resonate at all levels, but implementing these changes remains a challenge. Information professionals are making progress in communicating value, but too often they spend their time "circling back" with justifications rather than mapping out the path forward for a secure future in the information enterprise.

More recently, a *Library Journal* article discussed James Neal's comments from the 2011 ACRL (Association of College & Research Libraries) Conference, in which he called for shifting away from counting and calculating and toward looking at users' experiences. The same *Library Journal* article quoted ACRL Executive Director Mary Ellen Davis on why new measures are necessary. "The political and financial climates ... make it imperative that [w]e demonstrate [that] what we are doing is making a difference, how it is making a difference, and what it is making a difference, and what it is making a difference, said (Fialkoff 2011).

### **Contributing to Good Decisions**

While Davis and Neal were speaking of public and academic institutions, the need to develop new measures and demonstrate the difference libraries make applies to corporate and special libraries just as it does to public and academic institutions. Historically, collection and usage metrics were the standards used to justify the need for library services; over time, qualitative user experience testimonials also began to play a role in illustrating the value of the information center. Today's complex information environment requires more than just numbers and goodwill stories, however, so quantitative analysis is becoming more critical in certain camps due to financial and political pressures within the organization.

The process of identifying who and what matters in measuring and evaluating information services may make information professionals feel as though the real value is hidden in a complex maze. Direct user service is certainly one aspect to consider, but it may not hold much weight when an organization is struggling to justify large financial outlays for a service perceived as overhead. Another angle to consider is the cost of bad information or poorly

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managed information. The Information Opportunity Report stated that "poor utilisation of information assets equates to an annual £46 billion missed opportunity for private sector profits, and £21 billion in administrative costs across the public sector" (Harji 2008).

These types of bottom-line effects impose a new level of urgency on finding the best ways to measure impact and adjust services to make maximum use of an organization's investment in information services. Information professionals must measure services and report their impact in a manner that looks to the evolution of those services in order to remain a central component of the effective knowledge economy enterprise.

Providing services that contribute to good business decisions may be the single most powerful thing that libraries can do to add value to the organization. As Feldman and Sherman (2008) noted in the IDC report, "Company executives overwhelmingly agree that good access to information is the basis for improved decision making and leads to less duplication of effort within the enterprise."

The Information Opportunity Report indicated that while poor information quality and information systems were barriers to making good business decisions, other obstacles existed as well, including "ineffective policies and procedures, a lack of staff skills and training, the user culture, and business processes" (Harii 2008). This suggests that an information audit may be a critical first step in identifying the metrics that matter. The challenge is then to apply metrics that demonstrate value and contribute to profitable business practices while creating reports that speak to the needs of various stakeholders within the organization.

### **Meeting the Challenge**

The process of using metrics to demonstrate value is influenced by the nuances of information services. Actual usage is imprecise, the value of usage is not necessarily quantifiable, and qualitative reports do not illustrate an impact on the bottom line that is easily digested Your goal is to identify the best method(s) for aligning with your organization, evaluating the services provided, and implementing changes that demonstrate the information center's value.

in the C-suite. The conversation about metrics in libraries then comes down to the basic questions of what, who, how, where, when, and why.

Why may be the easiest question to answer in the context of using metrics to demonstrate value. Without the ability to communicate relevant data about the impact of information services on the organization, it is easy to dismiss the library as overhead, making it vulnerable to competition for funding and short-term cost savings measures. A search solution that offers ease of use. comprehensive analytics, and a seemingly simple, technology-based, onetime cost replacement is perceived as an attractive option for decision makers who may not fully comprehend the longer-term implications.

When is easy to answer—value should be demonstrated and communicated continually. Comprehensive reports should be delivered at regular intervals, such as quarterly or annually. These reports should be aligned with the reporting cycle of the organization.

Where metrics should be used and value demonstrated leads us to a more complicated answer. Information professionals move seamlessly throughout the hierarchy of their organizations, performing projects for everyone from the newest employee to the most senior executive. Information users are just one of many audiences that need to receive and share the message of the information center's value.

From a management perspective, however, where becomes more formalized and requires consideration of reporting value in management meetings, departmental briefings and other internal channels, including intranets, newsletters and blogs.

How to report value is nearly as complex as what to report. Value should be communicated verbally, visually and, perhaps most importantly, in the language of those receiving the information. Using the terminology of organizational decision makers allows the information center to add value to the report by placing library metrics in a business decision context.

As Ulla de Stricker (2012) advocates, we need to have people with clout deliver the message of our value. In the private sector, she says, those with clout are "... the ones attached to image, brand, marketing, sales and similar functions delivering revenue and profit." A message delivered by those responsible for making the business succeed has a larger impact than a message delivered by our everyday users.

Who is very similar to why in that end users, library champions, corporate decision makers and strategic partners (both internal and external) all need to understand the value of information services. Communicating metrics to librarians is essential to having a single message of high value communicated through all channels to the broadest possible audience of stakeholders.

What to communicate can open a world of debate that is intertwined with how to report value. There is a need to "find meaningful methods of communicating the need for, benefits and value of information services delivered by knowledgeable and capable professionals" (Ard 2012). Gaining that insight and delivering it in a manner that helps the information center require taking a look at metrics and more.

### The Impact of Metrics

The baseline consideration related to metrics is the need to use the right metrics depending upon the audience you are addressing. Just as a speaker or writer needs to know some basic facts about his or her intended audience, an information professional must know who will be reviewing the metrics and for what purpose(s) in order to deliver actionable and relevant data.

The information center is a mixed bag of services that consists of tangible and intangible values. The picture gets even more muddled when comparing quantitative and qualitative measures. Thus, customizing the message is critical to demonstrating and communicating the importance, impact and relevance of information services to the organization in a complex knowledge economy.

Competition within that economy influences decisions related to the funding and management of the information center. A change in the perceived value of an information center can cause a shift from a supportive environment to one that questions the relationship between costs and benefits.

So much work today is performed in a digital environment that there may be challenges related to metrics provided by third-party content providers. While Web analytics and content use metrics certainly have a place in assessing the value of information services, it would be unwise for information professionals to step away from the responsibility of owning those metrics.

"In today's hyper-competitive and increasingly cost-conscious business environment, the full potential of automated [W]eb analytics to derive business intelligence has not been realized in [the] library," wrote Alka Bhatnagar in a 2009 article in *Online*. "Without this analysis, libraries risk being marginalized in the virtual information world" (Bhatnagar 2009).

Different stakeholders will interpret the value of information services in different ways. As discussed previously, deciding what to measure is a complicated question and one that should be addressed proactively. The measurements you make should also be reviewed regularly to ensure that the metrics are still relevant.

As technology develops and usage shifts, so does the *what* you previously defined. No longer is it relevant to report the number of volumes you have in a collection when the message is related to value. The value derived from housing a large collection is easily challenged in the face of high real estate costs, duplicate access points, and actual usage.

The key factor in determining what to report is *aligning with organizational goals and values*. Identifying metrics that express how the information center meets those goals and supports those values is an important task that information centers should undertake.

How you communicate the metrics is another area that requires preparation and flexibility. One size does not fit all when it comes to reporting impact and value. While the CFO may want to just see numbers, graphs and charts, a CEO will want to tell a story that demonstrates the positive impact of information services on the bottom line. Qualitative value is much easier to share in a story than quantitative value, so reporting methods that combine the two may be the ideal solution.

Reporting for reporting's sake is as useless as meeting for meeting's sake. Reporting accomplishments must be accompanied by projections of how services can be adjusted to help the organization continue its successful exploitation of information assets.

### From Tradition to Projection

Measuring what has been done is somewhat easier than forecasting what is to come with an eye to making service adjustments. For example, return on investment is an after-the-fact metric that definitely has a place in reporting impact. Unfortunately, as competition for funding within organizations increases and the lines between library services and information services blend and meld with other departments, ROI becomes less useful than it once was. There are a variety of documented methods that can help you manage the business of metrics. Cost-benefit analysis, gap analysis, benchmarking and critical success factors are just a few of the available methods. Whether you use one, all, or some combination, your goal is to identify the best method(s) for aligning with your organization, evaluating the services provided, and implementing changes that demonstrate the information center's value.

Exploiting information that resides within the enterprise is a driving priority for businesses. As *The Information Opportunity Report* explains, an expensive content management or enterprise search system does not necessarily improve business performance. Information professionals are critical to maximizing the information assets in their organization. Metrics are an important element in demonstrating how the information center drives the successful exploitation of information assets beyond the library. **SLA** 

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### Metrics and Value

Schachter, Debbie Information Outlook; Sep/Oct 2012; 16, 5; ProQuest pg. 42



INFO BUSINESS

## Metrics and Value

Lessons learned from the human resources profession can help us better align our goals with those of our organizations and more easily show our value.

BY DEBBIE SCHACHTER, MLS, MBA

We are all expected to show value within our organizations, whether through usage statistics or through the information center's impact on organizational success. Each organization has its own expectations and/or requirements, but it is standard practice to gather data, measure the "right things," and regularly communicate our value to decision makers. Identifying what to measure and determining how meaningful such measures are to senior management have long been challenges for information professionals.

There are many different types of measures, ranging from direct usage (for example, the number of queries, the gate count, or the volume of database or Web usage) to qualitative measures to measures of the impact or outcomes of our services, such as linking information requests to successful sales or business cases. The simplest measures are often those we can perform easily, such as the examples of direct usage identified above. More meaningful measures generally involve much more effort to track and analyze, but they may, in the long run, be the most effective for justifying additional resources or ensuring greater understanding of the value of the information center (Hiller 2010).

Identifying the value and impact of information services may actually be easier for those operating outside of traditional information centers or libraries, such as embedded librarians or project team members. Because they are directly engaged in the projects and programs they support, the value of their skills is often much more apparent to the organization at large. But whether you are embedded or are working in a more traditional role or environment, it is important that you stay abreast of the evolving methods for tracking and identifying service value within organizations.

Mary Ellen Bates (2008) says we should "count things that matter to the bottom line." She recommends asking questions such as "Did we meet your information need?" and "How was this information useful for you?" to gather anecdotal information; she also favors identifying a method of reporting the "value of time saved" by creating a multiplier for each hour of work conducted by a librarian on behalf of another employee. Metrics that are effective one year may not be so meaningful the next, she says, so stay attuned to how other services are showing value in your organization and try to adopt their measures whenever possible.



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### **Three Challenges**

I myself often browse business literature to see what lessons can be applied to an industry or transferred from one profession to another. An interesting example I came upon recently can be applied directly to information centersan article titled "Transforming HRD into an Economic Value Add" (Berry 2011), which advocates for human resources functions identifying their value within their larger organizations. Many organizational services such as human resources and information centers are perceived as cost centers rather than value-generating areas and thus face obstacles when trying to communicate their value within their organizations.

The article highlights three challenges to the human resources function-from senior management, from people using HR services, and from human resources staff-that are also entirely relevant to information centers. For example, Berry notes that human resources "has not been seen [by senior management] as 'a source of revenue or profit growth'" but says that "by linking HRD solutions to specific business results. such as revenue-related metrics, senior management will begin to see [human resources] as a source of competitive advantage." This is a model we can also apply directly to information services.

As for the people who use human resources services, Berry explains that they perceive such services as "transactional" in nature, as "the end game rather than a means to increased business performance." This is similar to the dilemma faced by information centers, where customers think about getting a particular problem solved or an answer provided, but may not consider the service as integral to the success of the business.

The third challenge Berry identifies is how employees who provide human resources services are often impediments themselves to changes that facilitate the measurement of HR's value and impact. "Colleagues may not be happy with your use of measurements that focus on how your solutions improve the organization's performance," he writes. While our profession has always had the resiliency to change and adapt to the expectations of our organizations, we need to think about different ways of measuring and sharing the value of the information center, and there are other services that may help us determine how we can do so.

Confirm and revise the information center's goals. In addition to changing the way information services are viewed in the context of the organization (modeling it after the human resources example), you can also ensure that you are measuring the correct things by focusing on aligning the information center's goals with the organization's goals. The first step is to examine all of your existing services and activities with a view to how they contribute to organizational goals. If there are areas that are not in alignment, you need to consider how much effort is required to create and maintain these services and identify the true value of continuing to offer them.

Identify and implement metrics to show this value. Ask yourself what you need to evaluate. Is it value, efficiency, satisfaction, or outcomes? Can you evaluate and communicate the value of your service in a similar manner as other departments in your organization? Will this help senior management understand what you are contributing to the bottom line?

Try to track the end use of your services. If you are able, assign individual information professionals to projects to create a closer connection to your end users and help them understand the integral role that info pros play and how they contribute to project success. Build and sustain supporters, as this is one of the best ways to track usage and support and also alert you to any downturn in perceived quality of service.

Review and modify. Review what you are measuring and why you are measuring it. Do this regularly (at least on an annual basis), depending on new projects or organizational changes. Focus on aligning the information center's goals, both in intent and in language, with the broader goals of the organization. Always ensure that you are measuring in a way that will have meaning to your organization and industry.

For support, encouragement and good ideas, look to your SLA colleagues and participate in SLA Webinars and conference sessions. The best way to prepare for the future is by staying connected and learning from the many good ideas that are shared within our profession. **SLA** 

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