

STATISTICS



Topics

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A **statistic** is a numerical fact or datum.

Statistics are facts or data of a numerical kind, assembled, classified and tabulated so as to present significant information about a given subject.

WHY GATHER STATISTICS?

Library boards and staff have become interested in statistical techniques that might be used to evaluate the services they provide. The growing competition for funds has forced libraries to justify the importance of library service to those responsible for funding them. Funding bodies increasingly demand facts and figures to demonstrate that programmes are relevant and serving community needs. As a result, statistics are being gathered and being used in libraries.

Statistics can be used for a variety of purposes in addition to measuring performance. Other reasons for gathering statistics include:

- **Helping to justify increased resources**
Traditionally circulation records have been shown to the library board to prove how the library is used. Statistics also help justify a budget request or a request for increased funding.
- **Collection development**
In the area of collection development, knowing how many of which kinds of materials have been circulated is a good guide for deciding how to spend collection development funds. For example, knowing what percentage of the children's book circulation is in picture books, in fiction, as well as in different non-fiction subject areas, will help determine the percentage of the materials budget assigned to these different areas.
- **Planning**
Statistics can be used in a community needs assessment as part of an overall planning process for the library.



- **Promotion**

Statistics can be used as part of the promotion of the library to the community, for example, through the use of statistics in an annual report and press releases.

- **Scheduling/Hours of operation**

Good circulation records can help the library staff know which days and times of the day are the busiest and thereby determine work schedules and hours of operation.

In one text, the authors summarized the reasons for gathering statistics in this way:

“No matter how small the library is, it is a good idea to maintain a professional attitude toward record keeping. The very act of keeping good records can help your library grow. The more you know about your public’s response to your services, the more efficient this service can be. While meeting the public in a friendly and positive manner is the first rule of service, good record keeping to facilitate the growth of the entire library is the second.

Keeping track of statistics helps a librarian to see the progress of the library. When these statistics are viewed in a positive light of public relations, they become output measures which help to establish the pattern of library usage and needs which, in turn, can help the librarian and the board to set goals.”¹

Required statistics

There are certain statistics which are required to meet a particular obligation. The best example of this type of statistical information is the information required by the *Annual Survey of Public Libraries*. In Section 29 (2) of the *Public Libraries Act, Revised Statutes of Ontario, 1990, chapter P.44*, it is specified that an annual financial report and other reports must be made to the Ministry. Satisfactory completion of the reporting form is one of the requirements for receipt of the provincial library grant and the form must be completed by all library boards, contracting municipalities and First Nation libraries.

¹ Gervasi, Anne and Betty Kay Seibt. *Handbook for Small, Rural, and Emerging Public Libraries*. Phoenix: Oryx Press, 1988, page 109.



What are the *Annual Survey of Public Libraries* and the *Ontario Public Library Statistics*?

The Province of Ontario has been publishing public library statistics since 1883. The basic statistics still gathered today appear in the early reports. For example, the 1883 report published data on volumes held, periodicals and newspapers held, and circulation. The 1910 report showed legislative grants, municipal contribution, total revenue, salaries expenditure, total expenditure, volumes held and total circulation.

Since that time, the provincial government has continued to collect statistical information about Ontario public libraries. The Ministry of Citizenship, Culture and Recreation provides grants to libraries and wants to maintain accurate statistics about the services it funds. To achieve this goal, every library board in Ontario must submit a completed copy of the *Annual Survey of Public Libraries* to the Ministry.

Data from the *Annual Survey of Public Libraries* are used in the annual publication entitled *Ontario Public Library Statistics*. The publication is available in print form and on diskette. Parts of it are available through the Internet.

Through the SOLS Home Page, for example, one can view the 'Ontario Public Library Statistics - 1994 - Summary'. In early 1996, two versions of the information are included - 'Ontario Summary and Comparison' and 'Summary by Size and Type'. Information about individual libraries is not yet available onto the Internet. The address for the SOLS Home Page is:

<http://www.sols.on.ca>

Once at the SOLS Home Page, the search steps to find statistics are to *select* or *click* onto:

'Professional information'

Once on that page, select:

'Libraries and Community Information Branch, Ontario Ministry of Citizenship, Culture and Recreation'.

The heading on the selected page will say 'Cultural Partners Branch, Libraries and Community Information Branch'. It is interesting to note that from this point, the information is available in both English and French. At this point, select:

'News and publications'

At the 'News and publications' page, select:

'Statistics'

A sample of the 'News and publications' page has been reprinted one page over in this *Sourcebook*. From the sample, one can see the references to statistics, as well as the address to obtain direct access to the Ministry Publications page.



By processing the statistics collected in the *Annual Survey*, the Ministry is providing public libraries with information for comparison purposes. The performance and resources of individual libraries can be compared to other similar public libraries throughout the province.

The completion of the survey is not difficult although it may be time-consuming. Instructions are included with the survey -- at last count, roughly 16 pages of definitions and instructions. It is important that all of the definitions are understood, and that everyone is counting the same things the same way. The value of the statistical report depends on the **accuracy** of the data submitted. It is almost impossible to avoid some errors in any statistical report, but the report should be as accurate as possible.

There are 12 sections to complete in the *Annual Survey of Public Libraries*. The sections are as follows:

- A. Identification
- B. General information
- C. Holdings
- D. Loan transactions
- E. Reference requests
- F. Library uses
- G. Library physical facilities
- H. Regular library hours
- I. Library personnel
- J. Finances
- K. Statement of Capital Operations
- L. Certification

Several of the sections in the *Annual Survey of Public Libraries* are administrative in nature. These sections, including Section A, B, G, H, and I, can be completed without a special form or the collection of statistics. Sections J and K can be completed using the information readily available in the library's financial records. Other sections will require a bit of extra work in the collection of information. The actual collection of statistics will be described later in this *Sourcebook*.

The *Annual Survey of Public Libraries* is distributed to every library board in Ontario. Contracting libraries must also complete this survey. The form must be returned to the Ministry by March 31st of each year. Libraries serving First Nations communities must complete the survey by May 31st. If there is a problem in receiving a copy, or if there are any questions about the survey, contact a staff member of the Ontario Library Service.





There are two **types** of statistics which should be collected:

- information about the community
(for example, the composition of the community with respect to education, employment and population patterns)
- information about the library
(for example, how services are being used, who uses the library and what it costs to run the library)

The move in the library community has been away from international, national, and provincial **quantitative** standards towards local determination of library needs. A national quantitative standard of service may have little relevance to a local community. The trend has been toward planning for *local* needs. In order to plan, libraries must have information regarding their communities, and the library's services. This has led to a greater emphasis on collecting statistics from various sources.

Sources of data

There are two primary **sources** of data for this type of information:

- records compiled by other sources
- data collected in the library

Records compiled by other sources

A considerable amount of useful data is already available through various agencies. In the publication, *Needs Assessment and Strategic Planning for Public Libraries in Northern Ontario*¹, it is pointed out that:

“There are many potential sources of data. The trick in data collection is to make sure you don't reinvent the wheel. Ask around first. Don't presume that you have to start from scratch. It may be that someone else in your community has recently collected a lot of relevant data for other purposes. Other libraries in your area may have already done needs studies.” (page 3-2)

¹ *Needs Assessment and Strategic Planning for Public Libraries in Northern Ontario: A How-to Manual*. Sudbury: Ontario Library Service-North, 1994.

WHAT STATISTICS SHOULD BE COLLECTED

Quantitative measures involve data that is capable of being measured in some way, for instance, the size of the collection, current growth rate and expenditures on the collection.

Qualitative measures usually involve evaluating a collection against standard lists or against the holdings of other institutions.

Quantitative measures have more to do with statistics than qualitative measures.



Examples of statistical information which may be available are:

- recreation master plan, leisure time studies of the community or, in the case of some First Nations communities, a needs assessment of the entire community
- demographic data in such areas as population fluctuations, age breakdown, household type, ethnicity, and level of education available through various levels of government including the federal government, municipality or band office. For example, using the Census of Canada data, Statistics Canada has produced many publications. One of these, entitled *Profiles*, provides Population and Dwelling Characteristics by Census Division and Subdivisions.
- growth and development statistical information available through the local or county planning department, economic development office, business improvement district or chamber of commerce
- statistical information about special needs groups through Social Planning Councils or District Health Councils
- school enrolment projections through the local school boards

The information contained in the publication entitled, *Ontario Public Library Statistics*, provides a source of information about other libraries in Ontario. At the same time, the publication's information about each local library was collected by the library itself and submitted to the Ministry of Citizenship, Culture and Recreation through the *Annual Survey of Public Libraries* described earlier in this *Sourcebook*.

Data collected in the library

Certain types of records, such as financial information and personnel data, are legally required. In addition, to complete the *Annual Survey of Public Libraries* as required by the Ministry, certain statistical data about the library must be gathered on a routine basis. The required information includes library holdings, number of loan transactions, number of reference requests and the use made of the library.

It may also be necessary to collect other information about the library which is not available from another source. For example, the *Annual Survey* requires information about the total number of volumes and titles in the collection. A further breakdown of this type of information into subject areas and formats would be very useful for collection development purposes.



**What does it mean:
Input and Output measures**

The collection and use of statistics in libraries is an extensive and complex subject. With respect to statistics in libraries, two terms -- **input measures** and **output measures** -- are being used with increasing frequency .

F.W. Lancaster¹ described inputs and outputs in this way. Libraries acquire and store materials which are organized in some way in preparation for presentation to the users. Into the process, there are 'inputs' (i.e., selection, ordering, receiving, and cataloguing) and there are 'outputs' (i.e., the catalogue, shelf arrangement, reference service and circulation).

One of the best publications on output measures is entitled *Output Measures for Public Libraries*². In this book, the authors explain the process of gathering and presenting statistical information, particularly to library boards. They describe **output measures** as the data which may be used as indicators -- what a library gives to a community rather than what a library receives. This information is often called **performance measures** because it has been used to assess the functioning of the library. In other words, libraries do not exist merely to acquire books or to do the duties at the circulation desk, libraries are also concerned with promoting reading and making good use of the material in the collection.

In *Output Measures for Public Libraries*, the authors describe how five of the library's major services could be measured. The measures are as follows:

Library use

- *Annual Library Visits per Capita* is the average number of library visits during the year per person in the area served.
- *Registration as a percentage of population* is the proportion of the people in the area served who are currently registered as library users.

Materials use

- *Circulation per Capita*
- *In-library Materials use per Capita*
- *Turnover Rate* measures the intensity of use of the collection. It is the average annual circulation per physical item held.

Materials Access

- *Title-Fill Rate* is the proportion of specific titles sought that were found during the user's visit.
- *Subject and Author Fill Rate* is the proportion of searches for materials on a subject or by an author that were filled during the user's visit.
- *Browser's Fill Rate* is the proportion of users who were browsing, rather than looking for something specific, who found something useful.



- *Document Delivery* measures the time that a user waits for materials not immediately available including reserves and interlibrary loan.

Reference Services

- *Reference Transactions per Capita*
- *Reference Completion Rate* is the staff's estimate of the proportion of reference questions asked that were completed on the day they were asked.

Programming

- *Programme Attention per Capita*

In the publication entitled, *Output Measures for Public Library Service to Children: A Manual of Standardized Procedures*³, there is a good example of the use of turnover rates as a measurement of library service. Turnover rate is a figure that measures the activity of a collection or part of a collection (such as videos or picture books) over a specific time period. It is determined by dividing the number of circulations by the number of volumes. It indicates the average number of times each item circulates or 'turns over' during a specific time period.

For example, if there are 500 picture books in the collection and the circulation of picture books is 2,500 per year, the turnover rate for picture books is 5 loans of each book (2,500 divided by 500). To calculate turnover rates, the numbers of volumes (copies) in each area of the collection as well as circulation figures must be known. Most automated systems, if wisely managed, can provide these numbers.

A high turnover rate indicates heavy usage. Areas of the collection with high turnover rates are usually considered for higher budget allocations than areas with lower turnover. Children's materials generally have higher turnover rates than other materials. This can be a useful piece of information to have at hand when justifying the purchase of children's materials.

¹ F.W. Lancaster. *The Measurement and Evaluation of Library Services*. New York: Information Resources Press, 1977.

² Nancy Van House, Mary Jo Lynch, Charles R. McClure, Douglas L. Zweizig and Eleanor Jo Rodger. *Output Measures for Public Libraries*. 2nd edition. Prepared for the Public Library Development Program of the American Library Association, 1987.

³ Virginia A. Walter. *Output Measures for Public Library Service to Children: A Manual of Standardized Procedures*. Prepared for the Public Library Development Program of the American Library Association, 1992.



Certain statistics are only available at the library. If the information is needed, for whatever purpose, it must be collected.

There are a number of methods for collecting this type of data including:

- statistical collection forms
- universal tally
- random sampling
- surveys and questionnaires

Statistical collection forms

To collect certain types of statistical data, there are a number of forms which could be used. For instance, to complete Sections C and D of the *Annual Survey* referring to holdings and loan transactions, it makes sense to establish daily, weekly, and monthly data collection procedures in a form that leads directly to the totals needed at year's end. Specific information on the collection of statistics for individual library functions, and samples of the statistical collection forms, are discussed in the appropriate section of the *Sourcebook*. For example, statistics needed to complete Section D (Loan transactions) are discussed in a *Sourcebook* entitled *Collection development and management 5: Circulation*. Statistics specifically collected with respect to Section C (Holdings) are discussed in a *Sourcebook* entitled *Collection development and management 2: Selection, acquisitions and weeding*.

One example of time saving is in the area of annual circulation figures. Look carefully at what is needed to complete the *Annual Survey of Public Libraries* and consider if any categories presently collected can be eliminated. Establish daily and monthly data collection in a form that is compatible with the totals required for the annual survey.

Universal tally and random sampling

Other methods of data collection must be employed to complete Sections E and F of *Annual Survey* referring to reference requests and library uses. In many libraries, statistics on reference requests are collected on a continuous basis. Some have called this method, a **universal tally**. This approach is described in a *Sourcebook* entitled *Services 1: Reference and information service*.

The on-going collection of circulation statistics also falls into the universal tally method. The *Annual Survey of Public Libraries* does not require the continuous collection of data. Instead, this information can be collected in a typical week as prescribed during the fall. This is a different approach to the collection of statistics, usually called **random sampling**.



Random sampling is an easy method to collect statistics in areas that may be too time-consuming to be monitored continuously, for example, people entering the library, in-house use of library material. The principle involved in the 'typical week' is that a 'typical' period, action or person is representative of the whole. Therefore it is satisfactory to obtain information on a typical sample and multiply to have a picture of the whole.

Surveys and Questionnaires

In assessing community needs, a great deal of information can be obtained by looking at data that already exists. For example, a tally of the reference requests which have not been answered might reveal information about the collection, and might identify subject areas needing some work. This method of collecting information is a **non-reactive** or unobtrusive measure. The difficulty in using such a method is that the results in themselves may not be valid -- it may be more successfully used with **reactive** measures such as questionnaires or surveys before conclusions are drawn.

Surveys and questionnaires can be used to obtain statistical information and have been used quite extensively in community needs assessment and planning. In needs assessment research, when asking people's preferences, the person is often asked to rank or rate several alternatives or to respond to a checklist of items. This information must be analysed to make it very effective.

Sampling is another consideration in the use of surveys. How many people or pieces of print included in the research is the **sample size** -- and the larger the sample, the more valid the results and the higher the confidence level in the results. The people or print materials included become the **sample** -- and the sample chosen will affect the nature of the results. How people or things are selected is the **sampling method** or procedure -- a 'random' sample is one method.

Sampling issues and the use of surveys and questionnaires are described in greater detail in many publications including a publication called *Enjoying Research? A 'How-to' Manual on Needs Assessment* by Diane Abbey-Livingston and David S. Abbey, 1982. This publication was widely distributed to Ontario public libraries and is available from the Ontario Library Service. Information on sample size is also described in Sample 2 of the *Sourcebook for Small Public Libraries: Administration 5: Planning for Library Service*

Whatever method is used, it is important in collecting statistics to be consistent and to maintain the same methods so that comparisons will be relevant. Consultants from the Ontario Library Service will be able to provide assistance with techniques.



Data remains data until it is analyzed and repackaged into some meaningful measure. For instance, the data submitted to the Ministry of Citizenship, Culture and Recreation through the *Annual Survey of Public Libraries* is only a summary of one library's work in the previous year -- that is, until the information is combined with the summary data from other libraries and published in the *Ontario Public Library Statistics*.

ANALYZING STATISTICS

What does it mean: Average

- The **median** is the point that divides the distribution of scores in half; the value which is situated on or passing through the middle.
- The **mean** is the number obtained by dividing the sum of all the responses by the number of responses given. This is what most people call the 'average' or the arithmetic average.

For example, the daily circulation for a one month period is as follows:

<u>Tuesday</u>	<u>Wednesday</u>	<u>Thursday</u>	<u>Saturday</u>
69	43	72	101
72	51	79	120
75	40	86	122
50	58	96	150

Total number of items circulated for this month is: 1,284

The **median** is 75

The **mean** is: 80 items

*Obviously the measure used to express the 'average' can be much different depending on whether it is the median or the mean.

“Remember, statistics, like documents, do not lie - people do. Researchers need to be careful to verify and cross-check all statistical information used and should not adjust or manipulate statistics (‘fudge the figures’) to fit a report.”¹

What does it mean: Per capita

Per capita refers to the value for each person

If it is assumed that the annual circulation is approximately 15,408 (12 months x 1,284), and if the population for the community is 2,123 then the circulation **per capita** is 7.3.

¹ Tudor, Dean. *Finding answers: The essential guide to gathering information in Canada*. Toronto: McClelland & Stewart, 1993.



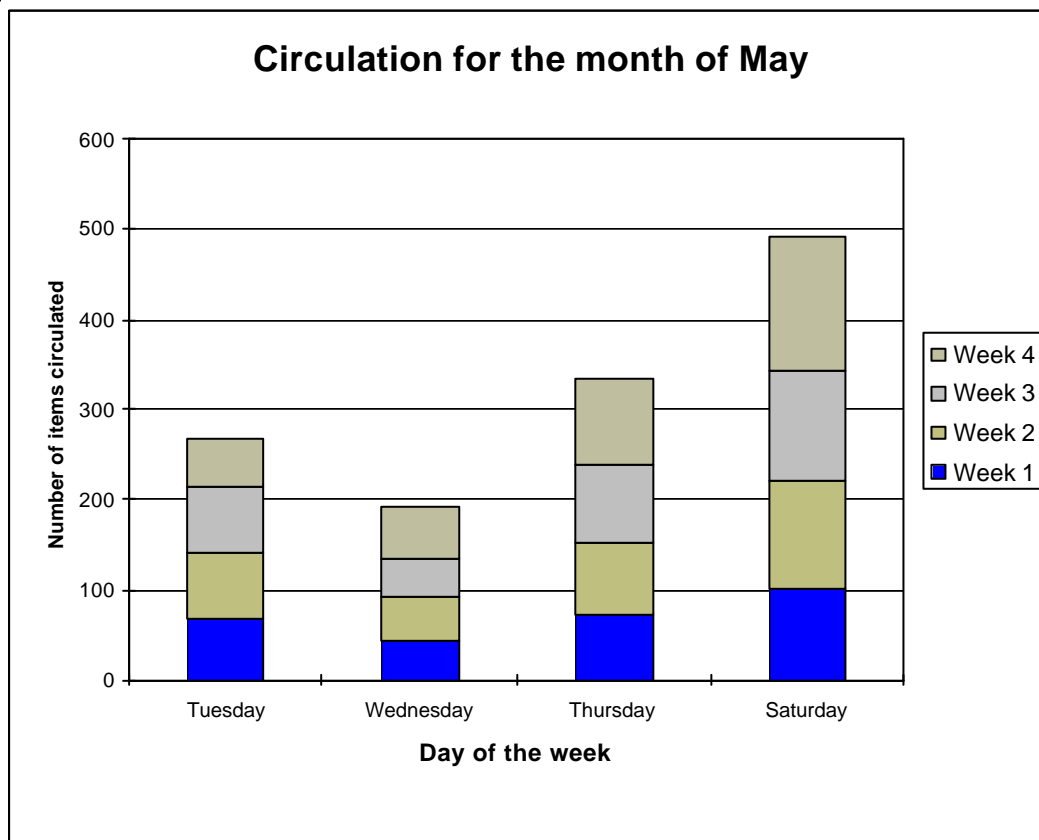
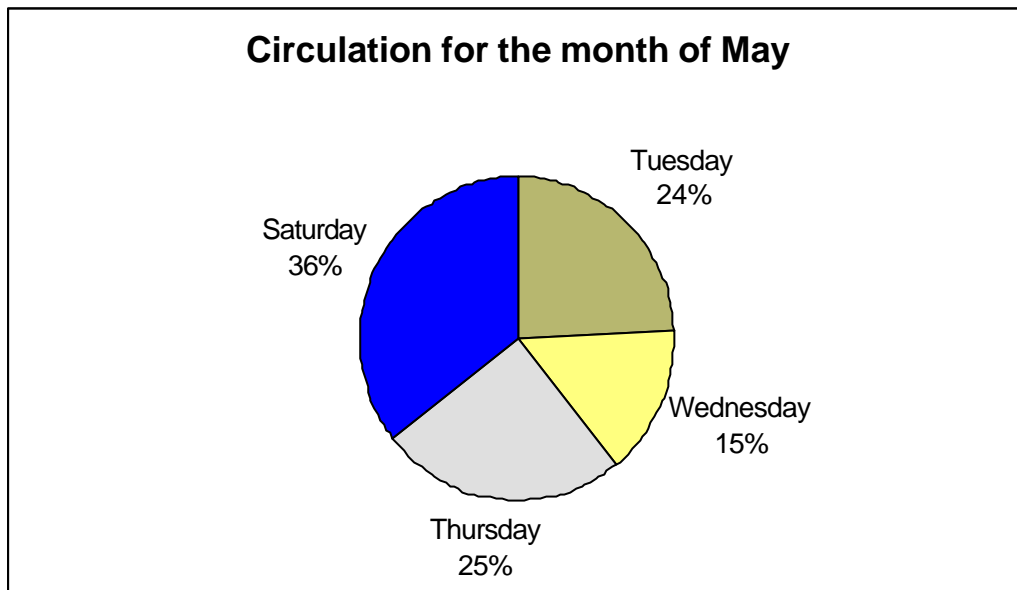
Presenting statistics graphically

To understand statistics more readily, information is often placed in a table or chart. Displaying the results graphically can be even more effective in getting the results across.

Commonly used graphics include bar graphs, pie charts and scatterpoints. A **pie chart** uses segments of a circle to represent different amounts of some result. If the results of a question were split 50-50, then each result would be represented by half a pie. In a **scatterplot**, each dot represents two measures on one item. For example, the age and activity level for each of several people could be plotted on one graph. Scatterplots are very useful for summarizing how two sets of results are related to each other.

With today's computer software applications, it is no longer necessary to create such graphics manually. For example, using the *chartwizard* found in the spreadsheet program Microsoft EXCEL, the user can create a number of graphics such as bar, column, line, pie, and XYscatterplots in regular form or 3D. In the example shown here, the basic statistical information from the previous page was entered into the spreadsheet. In five easy steps, the *chartwizard* was used to create a simple bar graph and a pie chart from the chart of information on page 12. The chart is also shown below, although it has been enhanced with lines.

This type of computer package has been purchased for use in many libraries. Other libraries have arranged for local access to such programs through the local school board or municipal office.





In collecting statistics, the rule of thumb for any library, large or small, is that if there is no immediate or planned use for the figures, time should not be wasted counting. Each library board should spend some time every year reviewing its statistical procedures with a keen eye, asking obvious questions such as:

What are we going to do with this information?

Why do we need to know this?

How are we going to use these figures and who else needs to know?

USING STATISTICS AS A MANAGEMENT TOOL

Evaluation of library service is a management tool that is applied to determine how effectively and how efficiently the library is serving the needs of its users. The evaluation of effectiveness can be **subjective** using opinions gathered in a survey, or it can be **objective** using quantitative measures. Once collected and analyzed, statistics from a variety of sources can help the library management or board to evaluate the programmes and services of the library.

As a management tool, library service can also be evaluated in terms of **cost-effectiveness** -- that is the efficiency of the internal operations of the library. More difficult is the evaluation of the **cost-benefit** of library service -- that is attempting to determine whether the expense of providing a service is justified by the benefits derived from it. The difficulty is that the effectiveness of library service can be measured statistically but the benefits of library service cannot be measured in an objective way. In this *Sourcebook*, the focus is primarily on statistical measurement.

Statistics gathered locally can be used to evaluate the effectiveness of library service. From that starting point, the statistics can be used for comparison to another library. With a bit of research and creative browsing, sources such as the *Ontario Public Library Statistics* provide invaluable management information for library planners and policy makers. The statistics in this particular publication can be used to provide:

- an evaluation tool for comparing the local library to others with similar population bases
- necessary background support when making presentations to funding bodies such as the municipal council
- assistance in planning the scope of an individual collection



- information regarding staffing levels per user and per various outputs such as circulation and reference questions
- information on expenditure for various outputs and resources

The general statistics in the *Ontario Public Libraries Statistics* are arranged according to size of population (e.g. under 5,000 population, 5,001-15,000, etc.) and by type (e.g. county libraries). A library board or staff can compile a profile of what similar libraries are doing. The small village library serving a community of under 5,000 population cannot be compared with a town library serving between 30,001 and 50,000 population or with a county library. Comparing libraries of similar size would illustrate levels of service which are attainable. For example, an individual library might be compared to another in terms of circulation per capita, volumes per capita and local support per capita or per household.

With this type of information, the library board could choose to start an outreach programme to reach people who are infrequent users or non-users of the library or to use public relations techniques to highlight material within the library to encourage greater use by patrons. Increased seating and study space in the library will generally lead to increased in-library use of materials. A library board that wanted to increase library use per capita might examine the library's opening hours to determine if they are sufficient and/or at the appropriate times.

Rarely are financial accounts considered to be statistics -- but they are a vital part of the Board's operational picture. Financial records are needed to complete the *Annual Survey of Public Libraries* and also to meet the needs of the municipal, band or county council for budgeting purposes.

If library activity statistics and financial records are considered together, it will be much easier to make useful management decisions. For example, if the *Ontario Public Libraries Statistics* show that more money is spent on processing than most other libraries, it may be time for investigation -- Are other libraries more efficient? Buying pre-processed material? Or not doing a very good job of identifying the real processing costs?



A case study¹

A weeding project at the Huntington Beach Library (California) helped address the problem of providing space for new materials and disposing of misleading entries in the computerized catalogue. It also provided interesting statistical information about the collection and its usage.

- The staff determined that 95.6% of the material in the library had circulated at least once in the previous 3 years.
- Numerous titles which had either been rebound or were missing their illustrated jacket cover had very low circulations, even if they were popular. One copy of a title which had an illustrated cover and was in good condition, circulated 19 times; the other copy with no cover and binding slightly torn had not circulated in 9 years. The library decided to avoid cataloguing books without illustrated jackets and not to bother rebinding books except for reference or essential out-of-print materials.
- A label with the year of acquisition was added to new fiction. This material was displayed in bins titled 'new books'. Once the year had passed, the books were shelved in the general fiction collection. While they were displayed, many titles had as many as 25 circulations; however, once they were returned to the regular fiction collection, they had 0 circulations. It appears that recent fiction is most popular; and displaying it increases circulation.
- The highest theft subject area was medical/health followed by automobile, boat repair and engine/motor repair books. Extra attention was to be given to these sections to ensure that replacement materials were acquired.

¹ Haydon, Ron. "If it circulates, keep it". *Library Journal*, June 1, 1987, pages 80-82.



Every community is unique. To provide appropriate library services, it is helpful to become aware of specific characteristics of the library community. For example, information about the ethnic makeup of the community can help in the development of the collection. Blue-collar workers, high-tech specialists and stay-at-home mothers have different needs and expectations of the library's services.

In planning terms, the phrase 'community needs assessment' is often used to describe the survey of people's needs, wants and/or preferences. As part of a community needs assessment, an information base is developed. This information base would contain information about the community and information about the library. Community characteristics would include how the community's population is changing, how the community's economy is changing and other factors influencing growth and development. As well, an accurate picture of the current state of the library services is needed. For instance,

- what is offered by the library
- how is it used
- who uses it
- what does it cost
- how does this library compare with other libraries of similar size.

This type of community and economic information can be found in the census, from the local chamber of commerce, the health unit, the board of education, and the social services agencies. Information on how the library compares to other libraries can be found in the *Ontario Public Library Statistics* publication mentioned earlier.

The results of a community needs assessment should be used to review the library's future objectives, which are then translated into policies, programmes, and activities.

What to do with the figures

- If 64% of the local population is in school or working outside of the community between the hours of 9 a.m. and 3 p.m., perhaps the library opening hours should be examined. Should the hours be weighted toward the times when people are free to visit the library?
- The visiting nursing service has identified 36 people in the local community who are homebound by reason of age or handicap. Should a visiting library service be planned?
- The Board of Education is expecting a 20% increase in kindergarten enrolment in three years. Should the library plan additional pre-school programmes during this time period?



USING STATISTICS AS A PROMOTIONAL TOOL

- Unemployment among school dropouts is running at 37% and two of the local employers of unskilled labour are cutting back or talking about closing. Can the library staff work with other community agencies to provide information about re-training schemes, career counselling, literacy training, or job search strategies?
- One hundred new homes are planned for your community. Has anyone approached the real estate people and the developer to publicise the library service as one of the 'quality of life' selling points?

The use of statistics as part of a community needs assessment is described in greater detail in the *Sourcebook* entitled *Administration 5: Planning for Library Service* and in *Needs Assessment and Strategic Planning for Public Libraries in Northern Ontario: A How-to Manual*.

Statistical information can be used as promotional tools in a number of ways.

- formal presentations (e.g., budget presentation to the municipal council)
- annual report
- marketing (e.g., press releases)

The key to using statistics in this way is that the statistics must be tailored to the audience. In other words, different statistics should be used at different times. For example, when speaking to a recreation group, a chart of circulation statistics would be useless. It might be better to compare the use of the library to the use of the community's hockey arena. Knowing that the members of the Lions Club are interested in vision and sight, the library guest speaker might focus on the size and use of the large print collection.

Presentation to council

The *Municipal Councillor's Presentation Kit* combines text, video and other materials to support a library in its promotional work. There are several ways in which statistics are used in the Kit. For example, one section highlights provincial statistics such as the fact that 99.92% of Ontarians have access to public library service and that there are 1,362 outlets deliver library service to Ontarians.



Annual report ¹

An annual report is an account of what has happened in the library over the past year. It is a key corporate document, used to identify change and to report on growth. The production of an annual report provides an opportunity to define the library's service to the public and to project a positive image of the library in the community.

Potential audiences for the annual report include library decision-makers, members of the community, businesses, library staff and other libraries. The audience will determine the format used in the annual report.

There are two steps in preparing the report. The first is data collection, the second is the actual writing. Data collection is an ongoing activity. It is easier if the materials such as statistics, programme information, press releases, as well as notes about renovations or changes in personnel and services are gathered throughout the year. Budget information should also be collected, particularly the proportion of funds spent on staffing and on materials. Once the materials are collected, each should be evaluated with a view to inclusion in or exclusion from the annual report.

The annual report might summarize the library's financial information in this way.

Trillium Public Library			
Your library received:		Your library spent:	
Town of Trillium allotment:	\$51,500	Salaries and benefits:	\$40,063
Province of Ontario grant:	\$ 6,964	Administration expenses:	\$ 2,641
Fees, fines, discarded book sales, etc.	<u>\$ 7,078</u>	Library materials	\$12,157
		Operation expenses	\$ 8,620
		Capital expenses out of current revenue	<u>\$ 1,661</u>
	\$65,542		\$65,085

While the financial aspect of an annual report is important, the report should be more than just an accounting of finances. As well as giving facts and figures, it is a picture of the library's past achievements and activities. It should be a readable promotional tool as well as being informative.

¹. Adapted from: *Small Library Kits #7: Annual reports*. A kit prepared by the Small, County & Rural Library Service of the Southern Ontario Library Service, April 1995.



Using statistics in an annual report

While all of the information must be organized so that the message is clear, statistical information presents a special challenge. Nothing is more boring to the reader than a mass of facts and figures. It is better to put the numbers in context and illustrate what the users are getting with their money. Ask 'what does this statistic mean to the people we serve?', then print the answer, not the statistic. For example, rather than saying

We added 50 reference titles.

Use this sentence -

We enlarged the reference collection by 50 titles, enabling us to answer requests more quickly and accurately.

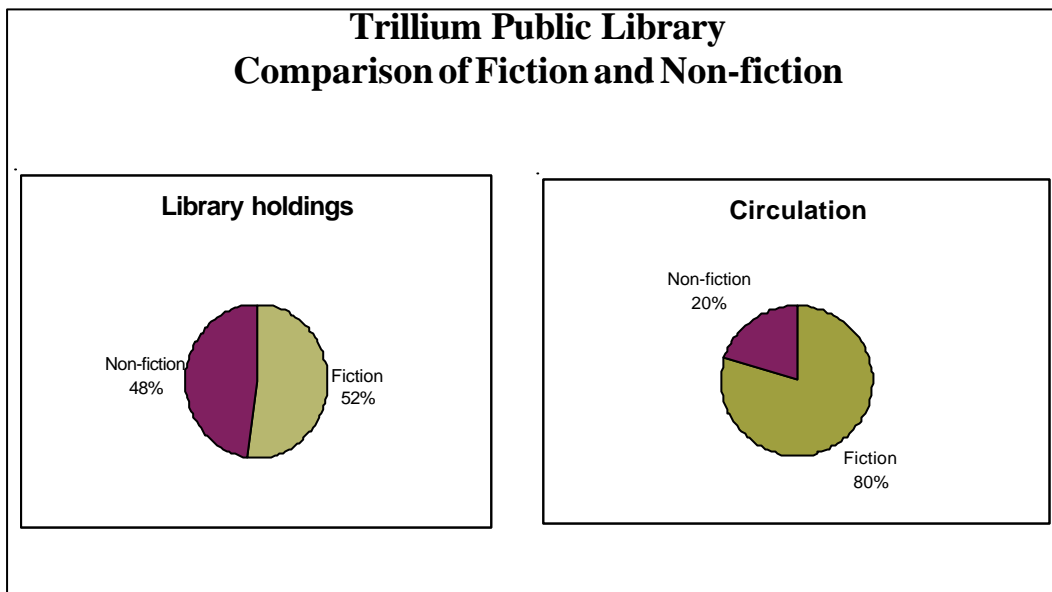
The layout and design of the annual report can make the statistical information look quite interesting. For example:

In 1996 how did we handle 63,910 materials circulated? 2,878 requests for information? 2,974 new materials added? One at a time!
--

Another way to present information clearly is to describe a programme or activity in terms of average statistics. The ways in which an average profile can be used are limited only by one's imagination. It could include such topics as the:

- average number of hours worked by staff
- average number of items checked out
- average number of questions answered
- money spent per capita
- monetary value of service
- average attendance at library programmes

When gathering statistics for the annual report, look for opportunities to present material graphically. If information can be presented in a more eye-catching way, the impact will be greater. Comparisons, in particular, lend themselves well to graphic representation such as pie charts or bar graphs.



In this example, the statistics can be used to support various arguments, for example:

- the non-fiction collection is too large **or**
- the fiction collection is too small **or**
- the non-fiction books need to be updated

In any of these cases, the chart makes the argument easy to understand. People are now used to seeing charts and graphs in the media. Libraries should use them in their reports.

Collecting and Reporting Public Library Statistics: A How-to-do-it Manual. New York: Neal-Schuman, 1996.

Lancaster, F.W. *The Measurement and Evaluation of Library Services.* New York: Information Resources Press, 1977.

Needs Assessment and Strategic Planning for Public Libraries in Northern Ontario: A How-to Manual. Sudbury: Ontario Library Service-North, 1994.

Van House, Nancy, Mary Jo Lynch, Charles R. McClure, Douglas L. Zweizig and Eleanor Jo Rodger. *Output Measures for Public Libraries: A Manual of Standardized Procedures.* 2nd edition. Prepared for the Public Library Development Program of the American Library Association, 1987.

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RESOURCES