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### **Community Assessment: An Essential Part of the Reference Librarian's Toolkit**

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#### ***Abstract***

*Las bibliotecas que se preocupan por sus usuarios comprenden la necesidad de obtener información y conocer los patrones de conducta y las culturas de sus comunidades y proporcionar los servicios necesarios para apoyarlos. En terminos relativos sin embargo, pocos bibliotecarios refrencistas poseen las habilidades o la experiencia necesaria para realizar una evaluación eficaz de la comunidad. No importa el tamaño de la biblioteca o de la infraestructura tecnológica, la evaluación comprensiva de la comunidad debe ser una parte integral entre los herramientas del bibliotecario referencista del Siglo XXI. Ese artículo presenta las razones del porque hay que hacer la evaluación de la comunidad, así como también los diferentes métodos y las técnicas que los bibliotecarios pueden emplear para evaluar y analizar a sus comunidades, y la importancia de incorporar los datos de la evaluación de la comunidad, en el desarrollo, la evaluación, y el mercadeo de los servicios de la biblioteca y de referencia.*

*Customer-centered libraries understand the information needs, behaviors, and cultures of their communities, and they provide the services to support them. Yet, relatively few reference librarians possess the skills or experience necessary to perform effective community assessment. Regardless of the size of the library or the technological infrastructure, community assessment should be an integral part of the reference librarian's toolkit for the 21st Century. This paper describes the reasons for doing community assessment, the various methods and techniques librarians can employ to assess and analyze their communities, and the importance of incorporating community assessment data into the development, evaluation, and marketing of library and reference services.*

## What Is Community Assessment?

### What is Community Assessment?

- Identify communities served
- Know their characteristics
- Understand community library and information needs
- Relate to the goals and mission of the library and its parent institution

Community assessment is an ongoing process that identifies the population served by the library, and their socio-economic characteristics, library and information needs, and patterns of library use. It also identifies stakeholders (those responsible for funding and library oversight) as well as potential library customers. The information acquired through this process is used to improve library services and programs so that we can best support the community within the limitations of budget and resources. Simply put, it means targeting your services and resources in a manner that is directly linked to the needs of the community. Community assessment also helps to ensure that the goals and mission of the library are aligned with community needs and stakeholder expectations.

## Why Is It Important for Reference Librarians to Do Community Assessment?

### Why Do Community Assessment?

- Know actual and potential customers
- Understand needs and use preferences
- Use funding and staff effectively
- “Competition”
- Community involvement
- Marketing and outreach
- Customer-centered and focused
- Measure value

It is especially important for today's libraries and librarians to understand their communities. The information environment is changing rapidly with more people having access to an Internet with ever more robust content and powerful search engines. Many academic libraries, for example, report a continuing decline in the number of reference inquiries and use of print collections. In an era of tight or reduced budgets, the margin for making wise choices in the provision of library services and resources grows even narrower.

During the past ten years, many libraries in North America and elsewhere have adopted the concept of the customer-centered library (customer will be used throughout this paper to refer to library users or patrons). Rather than measure library effectiveness through a cycle of inputs and outputs (e.g. number of reference questions answered), effectiveness is determined by the customer. Stoffle and her colleagues at the University of Arizona advocated that "library services and activities must be viewed through the eyes of the customers, letting customers determine quality by whether their needs have been satisfied. Librarians must be sure that their work, activities and tasks add value to the customer." While this concept may be new to libraries, the customer focus is a standard in much of the business world.

Reference librarians are in a unique position to participate in community assessment. They work directly with the community, either in-person or remotely, and know first hand about customer needs, the library resources (print or online) needed for support, as well as barriers and obstacles that the community might face in using libraries effectively. The front line nature of reference work also develops the linguistic, cultural, technical and interpersonal skills and expertise necessary to work with the community.

In addition to knowing who our current customers are, why and how they use libraries, and what needs libraries are not meeting, we need to understand the larger community, including those who do not use libraries, and the diversity within the community. If segments of the community do not use the library we need to know why. Is it because they do not need the library, can use other sources, had a negative experience earlier, or just do not know what services and resources the library offers? Libraries also need to be able to measure the value they provide to individuals, the community, stakeholders and other funding agencies. Community assessment provides the necessary base to support the customer-centered library and is critical for development of marketing and outreach programs. Community assessment can inform the library how to best support the community and involve the community in supporting their library.

## Choosing Appropriate Assessment Methods

### Choosing the Assessment Method

- Is it appropriate?
- Is it timely?
- Is it cost effective?
- Who will conduct it and what expertise is needed?
- What degree of user involvement is wanted?
- How representative does the population need to be?
- How will the results be used?

There are many methods that can be used in community assessment. Assessment does not need to be costly, require extensive research skills and expertise, or be personally intrusive. Assessment can be inexpensive, simple, quick, and still provide valuable information. It is important to choose methods that are appropriate. The choice of methods will depend on the type of information needed, the time, cost and expertise involved in data acquisition and analysis, how the results will be used, and the degree of customer involvement wanted. It is preferable to use multiple methods for community assessment in order to provide better validation of data and a more comprehensive review of the issues.

## Skills for Assessment

### Assessment Skills

- Comfort with numbers and data
- Open mindedness, non-defensive personality
- Skeptical nature, looks for corroboration

At this point we may ask if it takes special talents to perform assessment. Can any reference librarian do it? Any reference librarian can probably learn to do it. While reference librarians do not need to be experts in assessment methodology, they should understand basic methods and their appropriateness for different situations. In addition to many books and other publications on research methodology, workshops and short courses are often available (some through distance learning) for librarians to update their knowledge in this area. There may also be local expertise available in their library, on their university campus, or in other related agencies.

It is certainly useful for reference librarians to feel comfortable working with numbers, data, and basic mathematical procedures. However, it may be more important to have an open mind, the ability to see things from the customer's viewpoint, and the confidence to recognize problems and shortfalls, without becoming defensive or emotional. It is also helpful if one has something of a skeptical nature, always looking for evidence that corroborates or disproves the conventional wisdom. Reference librarians should be part of any library group involved in community assessment

## **Assessment Methods: Using Existing Information Sources**

### **Assessment Methods: Using Existing Information**

- Community data sources
- Reference staff observations
- Library use data
- Acquisition requests and interlibrary loan data
- Computer log data

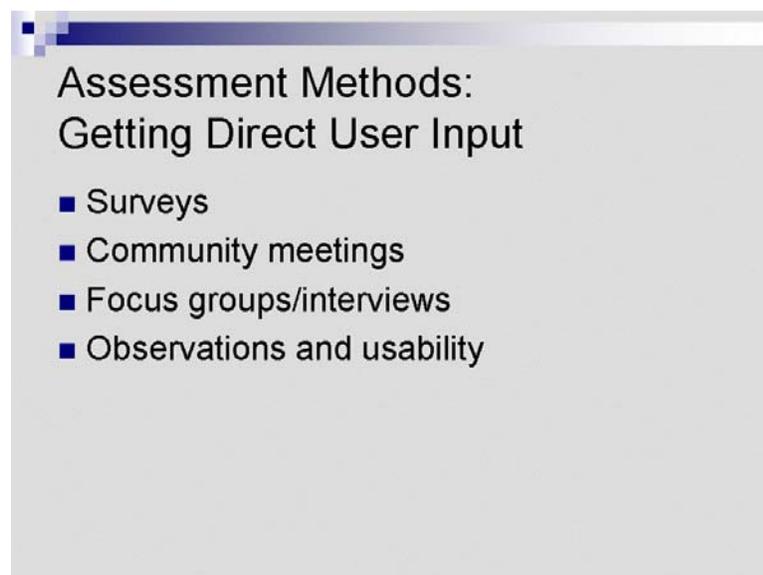
Community assessment begins with deciding the type of information needed, how to get it, and how it will be used. It is important to first identify and review existing resources before soliciting new data.

There is much information already available. For example, public libraries can use census data to obtain community information such as demographics, socio-economic characteristics and geographic distribution. Universities have information about student enrollments, major areas of study, and faculty research interests. These sources cover the potential customer community, not just active customers. There is also existing information about library use. We can analyze library data such as book loans, journal use, entry counts, the number of active borrowers, reference statistics, and Web site and other online resource use statistics to look at use patterns and change over time. We can review purchase or interlibrary loan requests to get a sense of

what the library community asked for. Computer logs or transaction records, including digital reference transcripts, can provide invaluable information on use of online resources and services as well as some measures of library success in meeting needs. Reference librarians through their direct interaction with customers can discern changes in the community that have an impact on library services and resources.

While much of this information may exist, it is not always easy to find and use. Many libraries do not have a central source for even their own statistical data which may reside in different departments within the library. Data may not be in a form that is readily usable either. As this is information that is also valuable to stakeholders and managers, an internal survey of data collected on library use and customers is a necessary first step in beginning community assessment.

## **Assessment Methods: Getting Direct Customer Input**



There are a range of assessment methods that can be used to more actively acquire information about our communities and customers. Existing library data generally cannot provide information on needs, priorities, barriers and satisfaction or knowledge about those who do not use the library. Active assessment normally involves additional resources, expertise and time, as well as a higher degree of customer involvement. The most common methods of active assessment include surveys, structured interviews and observation, community meetings, focus groups and usability.

Often the first method that comes to mind is a survey of the community. Yet, surveying is a complex methodology that may not be the most appropriate method. Surveys are useful mechanisms for reaching a large representative audience in a standardized manner. They can provide data which may be analyzed using a variety of statistical methods and also provide the opportunity for respondent comments. Surveys can range from relatively simple short focused ones that ask a few questions about activities, services, and satisfaction to very lengthy and comprehensive efforts to acquire as much information as possible about library use or non-use.

The keys to a successful survey are the ability to design and frame questions that survey takers can understand and thus give you information you can use. Thus, a survey is generally not the place to start. We need first to talk with and listen to our customers so we can understand issues from their perspective and in their language before we can design an effective survey.

Interviews and structured observation are active methods that can provide useful input at relatively low cost. These sessions are usually scripted and recorded using a consistent approach which helps maintain quality. For example, we can observe how individuals search bibliographic databases and library catalogs, or we can interview customers individually about specific issues.

A community meeting, either formal or informal, is another useful method. The views expressed in meetings, although not necessarily representative, are often held by others. A meeting also enables the library to provide the context and perspective for understanding issues. Meetings can be open, by invitation or with an already existing group. For example, many universities have faculty or student library committees; public libraries may have a friends of the library group or a community board. An open meeting gives all members of the community an opportunity to participate, but it also may require more active promotion to attract people. Meetings provide the opportunity to hear about issues that concern the community in the language community members use, rather than in library terms. They also send an important message that the library values community participation.

Focus groups are an excellent method of getting information directly from your community on specific issues and topics. They are guided discussions that let participants express their views and also interact with each other. Although the library will choose the topics for discussion, the discussion is done among the participants. Each focus group is comprised of six to ten participants and, while not necessarily representative of the community at large, the views expressed are often held by others. Focus group discussions also help frame issues from the perspective and language of the community.

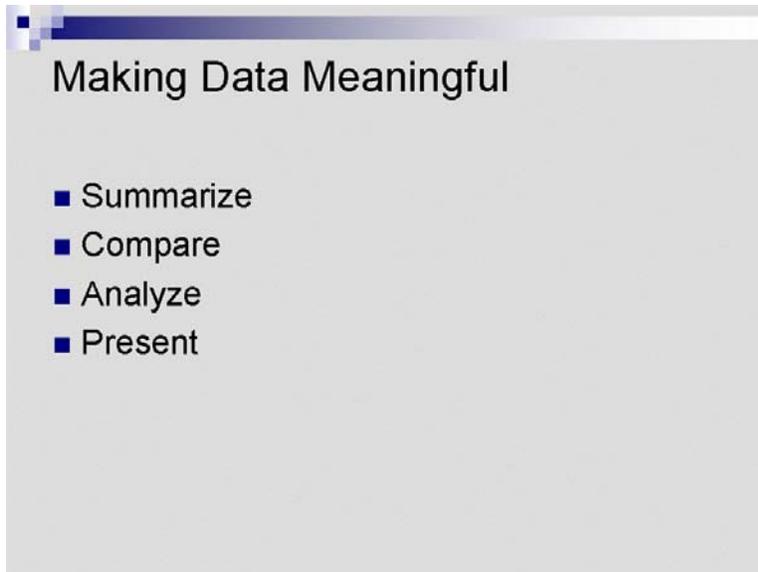
Usability involves a relatively small number of individuals who are generally given a set of tasks to complete, most often on a Web site. The individuals may also be asked about their reaction to design models. Their actions are recorded and they can provide additional information after the protocol is completed. Usability serves as a reality check for Web site design and use. While the way librarians use Web sites is often different from how our customers do, reference librarians can often identify potential usability problems from interactions with customers and notify those who are responsible for Web design and maintenance.

The type of qualitative information that comes from structured interviews and observations, meetings, focus groups, and usability is valuable on its own but can also inform the use of other assessment methods. For example, issues may be identified that will help the design of a survey that will reach a larger and more representative population. If survey respondents are indeed representative, results can often be generalized for the population as a whole.

There are many methods that can be used successfully for community assessment. They range from reviewing data that has already been collected to large scale community surveys. Choose those that are appropriate for your library and community. Remember to ask these three basic questions before you start:

- What information do we need to help our libraries better serve our communities?
- How will we get it?
- How will we use it?

## **Making Data Meaningful**

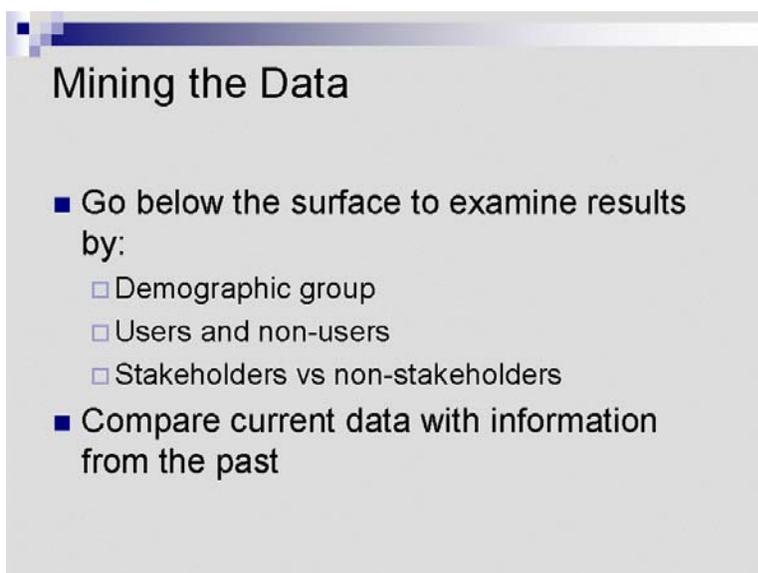


**Making Data Meaningful**

- Summarize
- Compare
- Analyze
- Present

Once the assessment data are in hand, what is the next step? The numbers do not speak for themselves, especially when there is a large quantity of data. The typical problem is too much data. To make use of the data, one needs a manageable set of numbers. It is necessary to determine what is important, and then to summarize the important data elements. After the data are summarized, it is possible to compare and analyze, to look for patterns and trends. But for the data to be useful, the findings must be presented in an appropriate and meaningful fashion. The decision makers must understand what the numbers say.

## **Mining the Data**



**Mining the Data**

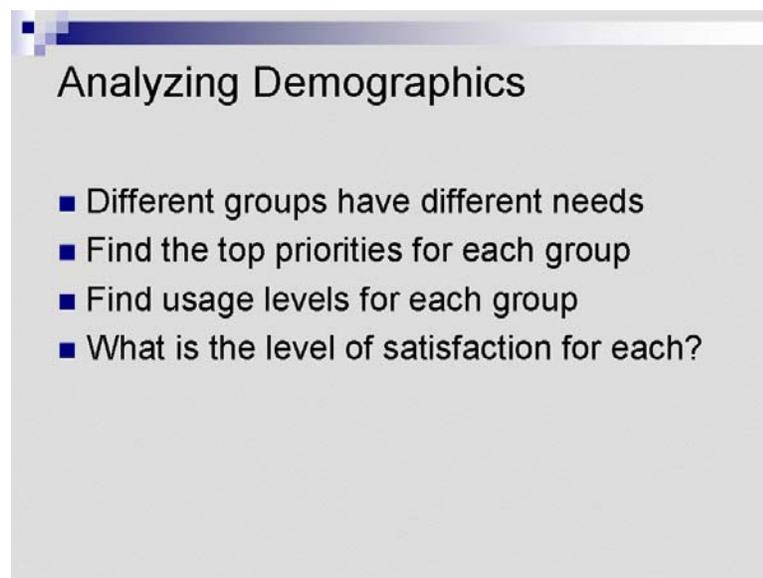
- Go below the surface to examine results by:
  - Demographic group
  - Users and non-users
  - Stakeholders vs non-stakeholders
- Compare current data with information from the past

Nearly all libraries serve a variety of constituencies. An effective assessment has depth; it examines data relevant to each of the major demographic groups. It compiles information from customers, but also from non-customers.

It also looks specifically at stakeholders, those persons who may or may not use the library, but who are in a position where they can affect the well being of the library. Political leaders and institutional administrators are two examples.

Finally, it is useful to compare present and past. How is the library performing now compared with last year, or five years ago?

## **Analyzing Demographics**



The slide features a title 'Analyzing Demographics' at the top. Below the title is a list of four bullet points, each preceded by a small blue square. The background of the slide is a light gray gradient.

- Different groups have different needs
- Find the top priorities for each group
- Find usage levels for each group
- What is the level of satisfaction for each?

A good assessment process will usually include a separate analysis of each demographic group because different groups have different needs.

For each group certain basic questions should be addressed:

- What are the top priorities for the group?
- What do they want from the library?
- How often do they use the services of the library?
- How do they rate the library's services?
- How satisfied are they?

## Assessing Market Penetration

### Assessing Market Penetration

- Who are our customers?
- Who else should be our customers?
  - Identify underserved demographic groups
  - Identify underserved geographic areas

An assessment also should reveal just who is making use of the library, and who is not. Information about underserved demographic groups and geographic areas can be an important part of marketing and publicity campaigns.

## Assessing Services

### Assessing Services

- High performing, heavily used services
  - Celebrate their success
- High performing, but underused services
  - Is marketing needed?
  - Is the service outmoded?
- Poorly performing services
  - Can they be fixed? Should they be discontinued?
- New services that are needed

A basic purpose of any library assessment is to assess major services and products. The services that are performing well, and receiving heavy use, should be noted and commended. Those performing well, but receiving little use, are identified for further study. Do they need marketing? Or might this particular service have become outmoded? The poorly performing service obviously need attention. What can be done to fix the service? Should it be fixed? Should it be discontinued? Finally, an assessment may turn up information about new services the library should consider.

## Sharing the Assessment Data

### Sharing the Assessment Data

- Always share the results
  - Community members
  - Library staff
  - Stakeholders and funding agencies
- Select the appropriate information
- Tailor the presentation to the audience

A basic rule is to share the data. When you do a community assessment, it is good practice to share the information with the community. We need to respect the time and energy they gave to the effort and let them know we take the information seriously and appreciate their help.

The assessment also should be shared internally with the library staff, and externally with all stakeholders, particularly with funding agencies. The presentation of information is an important element in the process. For information to be understood, it must be presented in an effective and appropriate fashion. The presentation should not try to include all the information; too much data will overwhelm the audience. It should contain the right amount--not too much, not too little. The same presentation will not work for everyone; the report should be tailored to the particular audience.

## Presenting the Information

### Presenting the Information

- Integrate data, graphs, and narrative
  - Trend lines
  - Customer comments
- Provide the source of the data

Good data reporting tells the story simply and honestly, so it can be easily understood. In most situations it is best to integrate data, graphs, and a narrative into a succinct and accurate presentation.

Trend lines and customer comments are very powerful; funding agencies often respond positively to these elements in a presentation.

Whenever possible, the presentation should include the data and the source, so a skeptical reader can verify it. It is also good practice for someone to sign, and take responsibility, for any assessment report.

The work for librarians does not end once the community assessment data has been gathered, analyzed and presented. Action must be taken to eliminate unneeded services and resources, highlight underused but beneficial services and resources, enhance services and resources, or implement new services and resources. For example, libraries that learn through assessment that in-depth questions are no longer asked at the reference desk might want to turn the reference desk into a general information desk and offer customers in-depth reference consultations by appointment. If a library offers well-constructed web guides to information resources but discover through assessment that the guides are not being used by customers because they cannot find them, a link to the guides could be placed in a prominent position on the library's home page. If assessment indicates that customers contacting the reference desk by phone become frustrated when calls are not quickly answered by the desk staff, a library could assign telephone reference duties to those not at the desk. If assessment indicates customers would prefer to receive reference assistance while working at home or from their office, a chat reference service could be implemented.

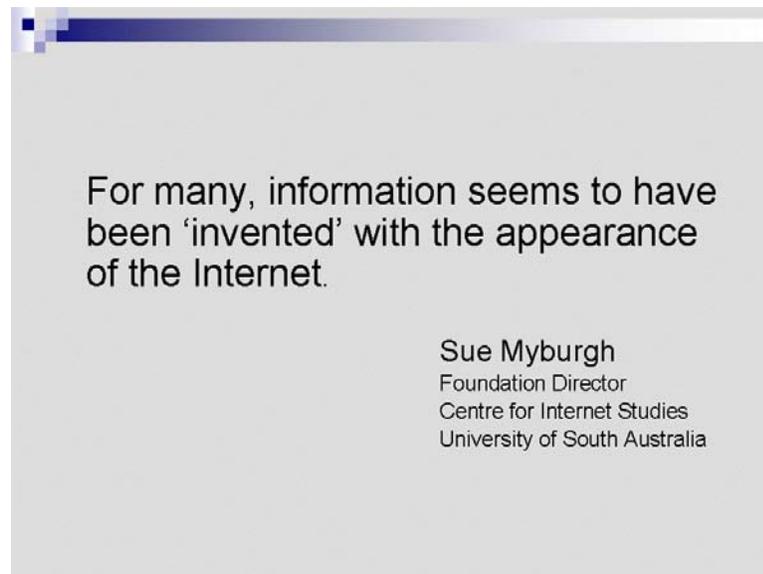
## Marketing

### Marketing

- Successful organizations use marketing to ensure customer satisfaction
- Products and services offered must meet customers wants and needs
- Libraries have not traditionally marketed their services and resources
- Competition has made marketing a necessity.

It is not enough for a library to respond to needs and hope customers will notice. Customers need to be made aware that action has been taken and change is occurring and that action will continue to be taken and that changes will continue to occur to meet their information needs. The process of communicating what is being done to improve services is something successful organizations and corporations have done for years. It is called marketing. For libraries to ensure their success, they too must engage in marketing.

Libraries have not traditionally marketed their services and resources and many librarians still find the idea unpalatable. But competition, especially from the Internet, has made marketing a necessity.



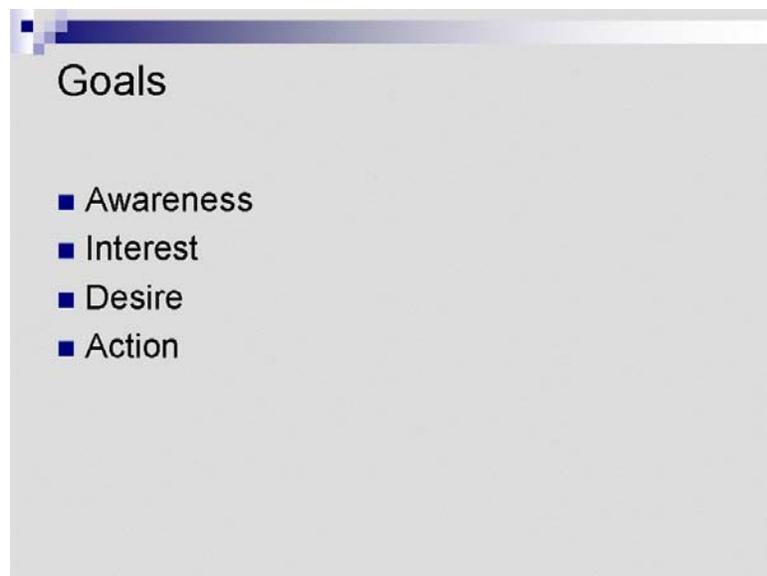
Organized campaigns launched in 2001 by the American Library Association (ALA) and the International Federation of Library Associations and Institutions (IFLA) have sparked interest in marketing among libraries worldwide. Branded by the @ your library® slogan, the Campaign for America's Libraries and the Campaign for the World's Libraries focus attention on increasing "awareness and support for libraries by increasing the visibility of libraries in a positive context

and by communicating clearly and strongly why libraries are both unique and valuable.”  
<http://www.ala.org/ala/pio/campaign/aboutyourlibrary/goalsobjectives.htm>.

The basic premise of marketing is ensuring customer satisfaction by meeting customer wants and needs. In libraries, customer wants and needs are met through the provision of services and resources. Libraries must communicate their value to customers as well as the changes libraries are making to satisfy customers’ expressed needs and wants. Promoting the benefits of existing resources and services is one way to do that; advertising new resources and services is another. Both actions are elements of a marketing campaign.

To develop a marketing campaign for your library, it is not necessary to have a marketing or business background; all that is needed is interest and enthusiasm for the endeavor and access to the Internet. 3M Library Systems has partnered with several ALA Divisions to develop how-to manuals that outline step-by-step processes for developing and implementing marketing campaigns in public libraries, school libraries, and academic and research libraries. The manuals contain valuable tips, tools and resources for promoting library resources and services and may be downloaded from the ALA @ your library® website’s:  
<http://www.ala.org/ala/pio/campaign/campaignamericas.htm> -- see PR Tools and Resources.

## Goals



The goals of library marketing campaigns are universal and can be remembered by using the acronym AIDA (action, interest, desire, action): to raise awareness of the library’s services and resources whether they are old, improved, or new; to increase customer’s interest in using the library’s resources and services; to encourage a customer’s desire to use a new resource or service, and to persuade customers to take action and use a service or resource. To meet the goals, libraries must actively promote the services and resources they offer.

## Designing a Promotional Campaign

### Designing a Promotional Campaign

- Select key messages:
  - Personal Assistance @ your library®
  - Information Expertise @ your library®
  - Quality Research Tools @ your library®
  - Anywhere, Anytime @ your library®

When designing a promotional campaign, it works best to focus right from the start on one customer group and the group's most important needs, or on one or two needs that many customer groups share. Otherwise, it is likely that the person or group developing the campaign will never get past the planning stage because the endeavor will become too complicated and overwhelming. One to two messages should be developed as campaign slogans; the slogan should reflect the message of gain while highlighting the benefits of using the library's resources or services that meet the need. Continuously bombarding customers with new messages about the same need throughout a campaign causes confusion; confronting customers with the same message delivered in a variety of ways is much more effective. A variety of methods and strategies such as direct advertising, personal selling, and public relation activities should be used to convey the message.

### UVA Reference Activity and Visibility in Student Surveys



From 1993 to 2001, the University of Virginia recorded a 50% decline in the number of undergraduate students who asked reference questions. A 2004 focus group with engineering students, a bright and articulate group, confirmed that students had never contacted a reference librarian for assistance when completing class assignments though library resources, as well as sources found by searching Google and Yahoo, were used. The students did not think of the library as a place that provided information and assistance. The librarians, of course, did.

Many libraries report similar experiences as customers work independently and from remote locations to meet their information needs. Marketing campaigns geared to change the information-seeking behavior of customers address the problem by getting the word out that libraries offer access to the private or deep Internet which restricts access through license agreements and fees to its 50 billion plus documents, not just the open or free Internet. The slogan *Quality Research Tools @ your library*® could be used to showcase reference resources and emphasize to customers that easy information is not always good information. If a library wanted to send the message that its electronic reference resources, indexes and abstracts, and full-text databases may be accessed from anywhere in the world at any desired time, the slogan *Anywhere, anytime @ your library*® would make the point. The slogan could also be used to call attention to technologies and remote access capabilities that make it possible for customers to send reference questions via email or use chat reference service for convenient assistance. Stressing the convenience factor of accessing resources and receiving assistance while working from a customer's place of choice accentuates a library's desire to accommodate the need for just in time information. The message also subtly communicates the libraries' understanding that time is, indeed, a valuable commodity. Another slogan, *Information Expertise @ your library*® would convey the message that reference librarians can save customers time and frustration as they search for accurate, objective, timely and reliable information. As electronic resources proliferate and familiar formats or interfaces change, seemingly simple searches become complex. Reference librarians who work with the resources everyday offer customers guidance in selecting tools as well as instruction in efficient and effective searching techniques.

## Implementing the Plan

### Implementing the Plan

- Select methods
  - Direct marketing
  - Advertising
  - Information packets
  - Awareness events
  - Give-aways
- Determine frequency & strategy for conveying message
- Establish timeframe

A detailed plan outlining what methods and strategies will be used to communicate a message, how often the method should be used, when the method will be used and how long a marketing campaign will last will help provide structure and keep marketing efforts on track. Methods and strategies may be used only once, monthly, several times a year, or on an ongoing basis; timeliness and cost are factors that need to be considered when determining the rate of recurrence for any particular method. If an academic library frequently enhances or expands its electronic resource collection, announcements to listservs using the subject line Quality Research Tools @ your library® would be an inexpensive way to communicate changes and additions with students and faculty. Flyers could also be used but would be a more expensive direct marketing technique. A corporate library that implements a new chat reference service could launch the service with fanfare. A useful promotional item, such as a desktop calendar, could be inscribed with Anywhere, Anytime @ your library® and distributed to employees as gifts during a public relations event such as an open house. Including the Internet address for the service would give the promotional item added value. Or, if budgets are tight, the librarian could use a personal selling technique and give presentations to groups of employees demonstrating the new service. School and academic libraries might decide to use personal selling strategies to stress the message Information Expertise @ your library®. The message could be conveyed verbally anytime a reference librarian interacts with a customer or teaches a class. A public library system might choose to directly market reference services by taking out ads in the local newspaper featuring a librarian as “Information Expert of the Month”.

## Key Points

### Key Points

- Integrate marketing into library routine and planning process
- Organize and staff for success
- Monitor and adjust
- Deliver what they want
- And remember...

For a marketing campaign to be successful, the library administration must support the effort. Marketing must be integrated into the library routine and planning process. Funding and resources must be committed, though promotional campaigns need not be expensive to be successful. The library must be organized and staffed for success with a designated person or group held accountable for marketing efforts. The entire library staff must understand the importance of marketing the library’s resources and services. Often, it is necessary to market marketing to the library staff. Marketing is not something a library does once, it’s an ongoing process that must be assessed as the campaign progresses and the various phases of the plan are implemented. If a strategy or method is not effective in getting a message across, then it’s time

to monitor and adjust. To better serve library customers, libraries must give customers what they want and need. Wants and needs change over time. Focus groups, interactions, observations, surveys and other community assessment measures can be used to judge change, progress and success.

Marketing is not an event, but a process... It has a beginning, a middle, but never an end, for it is a process. You improve it, perfect it, change it, even pause it. But you never stop it completely.

Jay Conrad Levinson  
"The Father of Guerilla Marketing"

In the words of Jay Conrad Levinson, "Marketing is not an event, but a process... It has a beginning, a middle, but never an end, for it is a process. You improve it, perfect it, change it, even pause it. But you never stop it completely."

Community assessment is also a process, not a discrete event. We work in a fluid environment, with constantly changing circumstances and needs. For reference services to be effective and remain viable, community assessment must be carried out repeatedly. Community assessment is a tool that every library needs to use and is an essential part of the reference librarian's toolkit.

 **Back to the Programme: <http://www.ifla.org/IV/ifla70/prog04.htm>**