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INSIGHTS BRIEF:
Build Your Library's Best Case for Data and Analytics

Based on a *Library Journal* webinar sponsored by Gale, a Cengage company.

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Karen Lemke
Head of Marketing and
Community Engagement
Rochester Public Library (MN)

ABOUT THIS INSIGHTS BRIEF

This insights brief focuses on data in public libraries and how library staff can build a data-driven culture. The panel was asked to consider what they see as the role of data and analytics in public libraries today and offer advice to other public libraries that want to incorporate data and analytics into their library system.

OVERVIEW

Patrons' needs have changed. With that change comes the opportunity to make decisions that better align your library's collections and services with the needs of your community. Data and analytics are the tools that help drive these decisions, but many librarians find it difficult to encourage decision-makers and colleagues to make the mental and physical shift to prioritizing analytics. In this discussion, three librarians who have found success in adopting data and analytics tools candidly discuss how they began building their case and how data has become essential for creating quality connections with their communities.

In this insights brief, library directors and staff will find actionable steps they can use to solidify the importance of data, encourage stakeholders, build a culture of data and evaluation, and find the right resources.

UNCOVER THE BENEFITS OF DATA AND ANALYTICS

Libraries are the heart of the community. To better serve that community, from patron to nonpatron, librarians have the task of understanding who their audience is and how to reach them. Our lives are all driven by data, whether we realize it or not. The question is whether your library is as data focused as you are. If it isn't, there are ways to get there.

Larry Irving, former principal architect for the Internet Policy Commission, said: "If you have data, you have facts. And facts drive policy." In the case of public libraries, facts drive more than policy. They drive programs, material handling, vendor selection, and purchasing decisions. **Charlie Burks, director of data analytics at the Columbus Metropolitan Library in Ohio,** explained that in a library setting, you almost can't run an operation without having some level of data to assess those decisions.

"At the Columbus Metropolitan Library, the one thing that we really try to do is use data to answer questions or discover trends, or confirm or deny hypotheses," said Burks. "It's not unusual for somebody to approach us and ask: 'We believe this is the case. Can you help us figure out if that's actually the truth or not?' I think that's important because all industries are now using data in a much deeper way."

For **Karen Lemke, head of marketing and community engagement at Rochester Public Library in Minnesota,** data is something to be shared. "I get excited about sharing data. We use it in very practical, hands-on ways with annual reports and infographics. But we're also using data elements to secure funding. Data holds us accountable for our strategic decisions and action plans. It helps us prioritize new initiatives at the library, and it helps us fully understand our community rather than looking [to] and relying on our own assumptions. Data helps us tell our story and put those numbers and facts and figures behind the story that we're sharing," said Lemke.

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> **Charlie Burks**
> Director of Director of Data Analytics
> Columbus Metropolitan Library (OH)

Lynn Hoffman, director of operations at the Somerset County Library System of New Jersey, agreed that data is integral to day-to-day operations. "It's about the gut check. For staff who don't interact with all of the patrons who use a service or a collection or program, they might only hear from people who are having a problem. If you only listen to those voices, you're not going to get a complete picture of whether your program or service is doing its job," explained Hoffman. "With data, you're able to confirm that gut reaction or determine that the bigger picture looks a little bit different than expected—which is really helpful."

GET LIBRARY STAFF INVOLVED

The first step in becoming a data-focused organization is starting the conversation. After that, it's important to realize that this will be an ongoing process, and it might look different than you expected. Hoffman admitted, "We're not completely there yet at my library. I am the data person, but there are still folks who question why I'm asking them to do this. I've found that working with data can feel threatening to staff, and there can be an assumption that the data is going to say something and a decision is going to be made that's not going to be what [they] want."

To help staff feel more at ease, Hoffman has tried to be specific about how their library is going to use the data. For example, she makes it clear that if she's looking at program data, she's not evaluating

the person in charge of the program but rather the people who are attending it and what they're getting out of the program. "It's a hard thing to overcome though. That feeling that data is going to tell me something that I don't like about what I'm doing," added Hoffman.

"We're data evangelists," Lemke affirmed. "We love the data and we like to get people excited about the data, but we also want to bring everyone along—knowing that we have so many more steps to go to get better data and to improve our data. It's a never-ending moving target as far as how well you're doing and how much you're doing."

Lemke went on to share what her library does to keep their shared goals top of mind. "We have a data wall that serves as our constant reminder that we're all in this together. It's on display in one of our public meeting rooms. It's a very public space. We have our staff meetings in here. We're sharing our data so that it's not just hidden in a spreadsheet on somebody's laptop. It is very visible." She also suggested updating data together as a team to keep staff engaged. "You can highlight key areas or key data elements with your staff members and reiterate your targets, goals, and benchmarks and watch them together."

For Burks, his library has had the most success when they've partnered with one or more departments—but acknowledged that is not always possible. "We're all used to being questioned on our data or methods. 'Did you consider this?' or 'What about that?' But we really do our best work when we can get with a department or a group of people and have a conversation: 'Hey, this is what we're trying to do. This is the data we're looking for. This is our ultimate goal.'" In his experience, Burks has found that most people are more than willing to be a part of the process. When meeting with subgroups or committees on various projects, he notices when somebody can see what he and his team have seen all along. It's that a-ha moment that makes the effort worth it.

MAKE PRIVACY PART OF THE CONVERSATION

As librarians know, with patron data comes great responsibility. Data-driven decisions are dependent upon targeting your audience based on their behaviors. For some, that's where they get the most pushback. Lemke shared, "I'm the marketer in the room with our data and administrative team. I'm always looking for ways to better target our audiences. But I'm also a librarian. I do have that hat, that protection of privacy." She went on to say that as her library works more and more toward equity—which includes making sure that everyone in the community knows what content and resources are available to them—it becomes increasingly important to send the right messages and target groups effectively.

Lemke gave an example of how this works in practice. "Recently, we moved away from an opt-in system for our email marketing and have instead gone toward an opt-out system for emails. On our annual customer survey, we asked people how they heard about [events and programs] from the library. Email. Number one, across the board. That's how we were able to effectively communicate through the COVID pandemic and get that information out. We know that when we have a targeted email, we have a greater reach."

Getting information into the right hands, while respecting patron privacy, is key to community outreach. Data-driven resources, like *Gale Engage,* can help libraries achieve that. Hoffman pointed out, "One of the things that really attracted us to *Gale Engage* as a product is the way that it handles patron data. We were looking for a way to draw some conclusions about patron behavior trends. *Gale Engage* anonymizes information in a way that allows you to make connections about what a single user is doing without having any ties to personally identifiable information." She went on to explain why this is so critical: "We'll be able to use that to look at our resources and get a better sense of how people use services in our collections, across

different products, and maybe see things that we didn't expect or that'll have us make some changes about how we approach collection development."

For marketing, having that information is a big win for libraries. It helps library marketers figure out how to develop messaging that targets each audience while still giving people a sense of security. "The data is only being used to provide the best library service possible," said Hoffman. Lemke added, "*Gale Engage* gives us the tool to be much more targeted and get those messages to the people that are really wanting those messages. I know it's a fine balance, but we also know the benefit of receiving targeted messages."

For Burks, the encryption process is what draws him most to *Gale Engage*. "I'm pretty strict on my team about not sending anybody's data anywhere without some level of protection. Even in addresses, we're looking at latitude and longitude as opposed to a physical address whenever possible," he said. "I also like the encryption that the hashing provides. . . . [W]ith a tool like *Gale Engage,* you can get your data in there. You don't have to worry about the encryption process. You know it's secure. You can get your data the way you need it, and that's just something else you don't have to worry about."

FIND DATA TOOLS THAT SUPPORT YOUR GOALS

When it comes to gathering information, you want a tool that can, as Lemke said, "do all the things." Surveys and publicly available information offer some data, but inevitably leave gaps. "Other products gave us information, but we were [still] struggling to get noncardholder data. That's what really attracted us to *Gale Analytics*. We know that not everyone [in our community] is a cardholder, sad to say, and I'm sure many libraries experience the same thing. We've got people in our community that could use [our] resources, but how do we reach noncardholders? That's what made us interested in *Gale Analytics*. But we also have relationships with our cardholders. We [use] both products because we wanted to go all in. We really want to understand our users."

Understanding who is in your community and who your users are and how to reach them is so critical right now," Lemke shared.

In addition to patron privacy, understanding nonpatrons, and better understanding patrons for targeting, Hoffman's focus has been on building capacity for data warehousing. "We were struggling with having data in lots of different silos but not being able to really correlate it together in any meaningful way," she explained. "We started to do some research about what it might look like for us to build that ourselves, what the cost would be, what it would take in terms of staff knowledge and expertise. *Gale Engage* can take in data from the ILS, but also from things like OverDrive or other databases, our door counters, and anything we want to stick in there. And where we have a library card number, that hashing that was mentioned earlier can connect behavior from one product to another, and we can draw some conclusions based on that. Having all the data in one place is huge.

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"If you're a small library and you don't have the staff, a product like *Gale Engage* can give you [that] kind of expertise and insight without having the body and building to do that for you."

Lynn Hoffman
Director of Operations, Somerset
County Library System of New Jersey

Data centralization has major benefits for library staff: saved time and improved results. "If you want to take two different silos' worth of data and figure out some relationship between them, you can do it with a lot of heavy lifting and a lot of frustration. Or, you can create a system where all of that data flows into the same place and has connections set up

between those sources so that you can draw those conclusions more easily," Hoffman testified from her own experience.

For Burks, the biggest benefit was the ability to ingest the digital data effectively. "When you're a hammer, everything's a nail, right? We had *Gale Analytics* for quite some time and used it to create our own branch dashboard, where we could compare and contrast how circulation and visitation are going in different locations," he said. Concerning electronic data, Burks and his team are still working through the ingestion process. "That will allow us to see the relationships between our cardholders' electronic use versus physical use, and I can tell you that there are some people on my leadership team that are very interested in what that relationship looks like."

INVEST IN YOUR COMMUNITY

When it came to navigating the COVID-19 pandemic, Burks, Hoffman, and Lemke agreed that priorities certainly shifted, but their commitment to the well-being of their community was stronger than ever.

When programming stopped at Rochester Public Library, Lemke asked to shift funding that had been earmarked for marketing. "We had this funding available, and I said, 'Please, we see the effect of this pandemic. We see what is happening in terms of equity. Can we please shift it in this area so that we can better understand who we are reaching and who we are not reaching and make this investment? Because it is an investment, but it's an investment that we can't ignore. For us, it was like, of course, this is the time to do this.'"

Hoffman's experience was a bit different. The Somerset County Library System was already on the hunt for a centralized data aggregation and analysis tool. One of her considerations was "What are the key performance indicators that we want to pay closer attention to? We've traditionally looked a lot at physical circulation. That is kind of meaningless if you're closed to the public and not doing curbside for several months and there's no physical circulation

to look at. So, being able to look more at things like cardholder retention and how often people use their cards for all of the things—checking out physical materials, accessing databases, signing up for programs—and looking at how many people did something in the last three months or the last six months as a way to measure our engagement with our community differently than we had previously."

Burks agreed that timing was a factor for Columbus Metropolitan Library. "Our data team of two, plus me, is actually pretty large in this space, but we were already stretched thin in the midst of COVID. We were doing social vulnerability studies. We were looking at unemployment data. We were trying to figure out what processes we could still monitor and measure and then deliver in the midst of the pandemic." And like most libraries and businesses, they were in various states of opening and reopening. "We had just rolled out our big dashboard, and now we were being asked to do two more dashboards—and any additional help in this space is truly valuable. To know that there was another tool out there that we could leverage—that took some of the weight off of us trying to do that work manually—made all the sense in the world."

BUILD YOUR CASE FOR DATA AND ANALYTICS

Hoffman recommended figuring out who your allies are and how they can offer support. "Hopefully you've got someone in your administration, perhaps your director, who is already on board. That kind of support is really useful. Also, get a sense of who's really good at spreadsheets. Who really likes to look at census demographic data? Who are the people who can help you cheerlead? Then, find something to examine that will make everybody feel good. We used Project Outcome in my library. We looked at our summer reading program because that was a no-lose situation. We already knew we were going to get lots of feedback that [confirmed] that this has been really helpful and [has] made a difference in the literacy skills of children."

Lemke agreed that it's imperative to get leadership on board when building a case for data and analytics, but to be effective, your strategy needs to include everyone's buy-in. "Everyone needs to have some part in it—whether it's helping in the distribution of surveys, helping craft tangible infographics, or giving ideas of other ways to share." Learning about your community is one thing, but you can't forget about what happens next. "There's also the show part—where you're sharing those outcomes and those measurements and making sure that your community is hearing about what you're learning."

For Lemke, that means physical logic models that people can put on their desks and refer to. By making data part of the everyday conversation, she's been able to get everybody on board. "Whether it is fussing with the spreadsheet or giving feedback on the latest survey, wherever we can engage new teammates in that process [we do it]."

Once you have support from leadership and your team, it's important to look for quick wins. "We developed partnerships with individuals," said Burks. "The people that enjoy the spreadsheets. You can easily find those people that you can partner with to then build relationships with. And one of the great things about what we do at CML is we have people in other areas that regularly partner with my team members. And that allows our influence to spread throughout the organization."

As most of us have learned through struggles and successes, so much is possible when we work together to achieve it. There's no better example of that than in the public library space. In this discussion, we learned that everyone's route to becoming a data-driven organization might look a bit different, but the long-term benefit is a richer connection with your community and a deeper purpose for your library team.

Gale Engage and *Gale Analytics* are comprehensive, data-driven solutions that libraries can leverage to better understand their patrons as users of their library and their community and as consumers of goods and services.

Gale Engage gives libraries the "inside the library" view; while *Gale Analytics* gives libraries the "outside the library" view. When used together, these tools help libraries understand their patrons and nonpatrons: who their community is and how to effectively interact and connect with them.

Thank you to our expert panelists for being part of the webinar that inspired this insights brief. **Charlie Burks,** director of data analytics for the Columbus Metropolitan Library in Columbus, Ohio; **Lynn Hoffman,** director of operations at the Somerset County Library System of New Jersey; and **Karen Lemke,** head of marketing and community engagement at the Rochester Public Library in Rochester, Minnesota.

ABOUT GALE

We believe that libraries are the heart of the community. We hope to strengthen the connections you've made by offering resources that can assist people at every stage of life. That includes supporting workforce development; providing adult learning opportunities; contributing to small business success; and creating focused programming for topics that matter most, such as equity, diversity, and inclusion (EDI) initiatives.

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