

# Patrons, Services, and Policy Assessment/Analysis Worksheet

| <b>Patron Overview Assessment</b>  |                                |
|--|--------------------------------|
| Overall population—How many people in your community?  |                                |
|  | Juvenile (6th grade and under) |
|  | Teens (7th grade–12th grade)   |
|  | Adults                         |
|  | Seniors                        |
| Library's overall population growth over last 5 years  |                                |
| Projected overall population growth over next 5 years (see govt. entities or Chamber of Comm.) |                                |
| Number of cardholders  |                                |
| Percentage growth of cardholders in last 5 years   |                                |
| Number of daily visitors   |                                |
| Percentage growth of daily visitors in last 5 years  |                                |
| Are library income/budget projections available for the next 5 years?                          |                                |
| Current-year reference question counts   |                                |
| Percentage growth of reference question counts in last 5 years                                 |                                |
| Average yearly increase in reference counts  |                                |
| Library circulation  |                                |
| Percentage growth of circulation over last 5 years   |                                |
| What percentage of daily library users typically have a library card?                          |                                |
| What is the age group breakdown of those using technology within the library? (percentage)     |                                |
|  | Juvenile (6th grade and under) |
|  | Teens (7th grade–12th grade)   |
|  | Adults                         |
|  | Seniors                        |
| What is the typical computer literacy level of patrons per broad-based group?                  |                                |
| Rate: 1: No Knowledge, 2: Some Knowledge,  | Juvenile                       |
| 3: Good Knowledge, 4: Technically Savvy  | Teens                          |
|  | Adults                         |
|  | Seniors                        |
| Average number of daily programs   |                                |
| Average number of program attendees daily  |                                |
| Average number of meetings by outside groups at the library daily                              |                                |
| Average number of outside group meeting attendees  |                                |
| Average yearly reading and book club participants  |                                |
| <b>Stats for the New Century</b> (You may or may not have access to these types of stats.)     |                                |
| Website hits   |                                |
| Which pages are the most frequently visited?   |                                |
| List:  |                                |
| Average number of online catalog searches (from outside the library if possible)               |                                |
| Average Internet users per day   |                                |
| Average Wi-Fi users per day (if Wi-Fi is in use)   |                                |
| Daily circulation of technology items (i.e., laptops, iPods, A/V equipment)                    |                                |
| Average reference counts for technology-specific questions                                     |                                |
| Average daily technology-related programs (or programs that significantly use technology)      |                                |
| Average daily attendance of technology-related programs  |                                |

From K. Bolan and R. Cullin, *Technology Made Simple*, © 2007 by the American Library Association.

# Patrons, Services, and Policy Assessment/Analysis Worksheet (Cont.)

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|  | <p><b>Patron Overview Analysis</b></p> <p>Compare your population data with your current budget priorities. Are there areas of disconnect?</p> <p>What future growth trends will the library need to address?</p> <p>If income/budget projections are available, does it appear that budget growth is going to keep up with service increases mandated by population growth?</p> <p>If not, what are the most likely areas of library services where growth can be limited to keep core services in line with the library's priorities?</p> <p>What are likely to be the changes brought on by the changing technology literacy of the patron base?</p> <p>Will the future call for more or less technology training (e.g., more older patrons want training while younger patrons are highly computer-savvy and will need less training)?</p> <p>How can future library programming be shifted to take into account shifting patron needs?</p> <p>What areas of the library that use manual processes should be considered for more automated solutions (e.g., program planning and online registration, meeting room booking, reading programs, media and electronic booking)?</p> <p>Is the overall design of the library website adequate to serve the patrons?</p> <p>What do some of the average-use statistics tell you about how patrons are using the library?</p> <p>What areas of the library besides books seem to be the most popular and highly used?</p> |
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|  | <p><b>Policies and Procedures Assessment</b></p> <p>Is there an Internet policy in place?</p> <p>Is there a general computer use policy in place?</p> <p>Are policies and guidelines posted for patrons to see?</p> <p>Does the library have a procedure for out-of-town/visiting patrons or those without cards?</p> <p>Is the library complying with the Children's Internet Protection Act (CIPA) and other regulations?</p> <p>Does the library have a disaster recovery plan?</p> | <table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table> |  |  |  |  |  |  |  |
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|  | <p><b>Policies and Procedures Analysis</b></p> <p>Are the current Internet and computer-use policies adequate and in line with regional standards?</p> <p>Are policies and procedures in line with typical policies/procedures from around the country?</p> <p>If CIPA regulations are not being met, would adherence to them be a "positive" for the library?<br/>For how the library is perceived by the community or in relation to funding?</p> <p>If a disaster recovery plan is not in place, is a plan being developed to put into place?</p> |
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# Patrons, Services, and Policy Assessment/Analysis Worksheet (Cont.)

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|--|---|--|
| <b>Public Computers</b>                          | <b>Services and Programs Assessment</b>   |  |
|  | Are computer access services beyond online catalogs offered to the public?<br>List: (examples may include Internet, e-mail, other software, databases, etc.)  | <input type="text"/>   |
|  | Does the library require computer users, etc., to have a library card?  | <input type="text"/>   |
|  | Do patrons typically have to wait for access to public PCs at peak times?<br>Does the library offer sign-up for public PC time?<br>If yes, is the reservation system available online from outside the library?   | <input type="text"/><br><input type="text"/><br><input type="text"/>   |
| <b>Wi-Fi</b>                                     | Does the library use wireless networking (Wi-Fi)?   | Internal Only <input type="text"/><br>Public <input type="text"/>  |
|  | Is Wi-Fi open to the public or does it require validation (library card, key at reference desk, etc.)?<br>Does the Wi-Fi coverage extend beyond the walls of the library?   | <input type="text"/><br><input type="text"/>   |
| <b>Technology Training (Formal and Informal)</b> | Is brief individual technology instruction available for patrons from on-duty staff?<br>Are training programs offered to patrons on Internet use?<br>List:  | <input type="text"/><br><input type="text"/>   |
|  | Are training programs offered on the online catalog and related items?<br>List:   | <input type="text"/>   |
|  | Are other technology-related classes offered to the public?<br>List:  | <input type="text"/>   |
|  | Are programs and services in place for bibliographic instruction?<br>List:  | In Person <input type="text"/><br>Via the Library's Website <input type="text"/>   |
|  | Are there any remote conferencing options for training available in your area (i.e., local colleges)?   | <input type="text"/>   |
| <b>Circulation</b>                               | Does the library provide a method for placing materials requests, holds, interlibrary loans online?<br>Does the library give e-mail notification of fines, reserves/holds, programs, room reservations, etc.?<br>Does the library circulate technology-related collections?<br>If yes, how many items are "circulated" per week?  | <input type="text"/><br><input type="text"/><br><input type="text"/><br><input type="text"/>   |
|  |   | Software <input type="text"/><br>Hardware <input type="text"/>   |
|  |   | Audiovisual Materials (DVDs, computer games, music, etc.) <input type="text"/>   |
|  |   | Virtual or "e" Collections (i.e., e-books) <input type="text"/>  |
|  |   | Other <input type="text"/>   |
|  | Is virtual or electronic reference offered?<br>If so, how many reference questions per week?  | <input type="text"/><br><input type="text"/>   |
|  | Does the library have adaptive technologies for special needs patrons?<br>If so, typically how many patrons per day require special needs technologies?<br>List technologies available:   | Via E-mail <input type="text"/><br>Via Chat <input type="text"/><br>Via Third-Party Software <input type="text"/>                            |
|  | Does the library offer online program calendars and information?<br>Does the library allow patrons to register online for programs?<br>Does the library provide online access to meeting room availability?<br>Does the library allow meeting room use requests to be submitted online?<br>Does the library offer online services for reading programs or book clubs?<br><br>Other: | <input type="text"/><br><input type="text"/><br><input type="text"/><br><input type="text"/><br><input type="text"/><br><input type="text"/> |

# Patrons, Services, and Policy Assessment/Analysis Worksheet (Cont.)

|   |  |
|---|--|
| Public Computers                          | <p><b>Services and Programs Analysis</b></p> <p>What additions and/or changes need to be made in the public computer area to improve service?</p>  |
| Wi-Fi                                     | <p>What additions and/or changes need to be made to Wi-Fi options to improve service?</p>  |
| Technology Training (Formal and Informal) | <p>What additions and/or changes need to be made to technology training services?</p>  |
| Circulation                               | <p>What additions and/or changes need to be made to circulation services?</p>  |
|   | <p>What additions and/or changes need to be made to online/virtual reference services to meet patron needs?</p> <p>What additions and/or changes need to be made to special needs technology services to meet patron needs?</p> <p>What other technology or services should be added to improve services and help better automate staff processes?</p> |