Benchmark 101: Become a Data-Informed Library

November 13, 2023
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Benchmark 101: Become a Data-Informed Library

November 13, 2023
Speakers

Sara Goek
Project Manager, Data and Research PLA

Katina Jones
Program Manager, Evaluation and Assessment PLA

Renee DiPilato
Director of Libraries and Historical Resources Sarasota County, FL
LIBRARY METRICS AND TRENDS

The newest tool for data-driven planning and advocacy in libraries

librarybenchmark.org

Email: plabenchmark@ala.org
Agenda

I. Why Benchmark
II. Making Effective Peer Comparisons
III. Using Benchmark for Strategic Planning
IV. Next Steps
V. Q&A
WHY BENCHMARK

Sara Goek
Background

1988-2018
- Annual Public Library Data Service surveys
- PLA Metrics

2019
- Focus groups and conversations with the field
- PLDS retired

2020
- New annual topical survey model launched

2021
- Benchmark: Library Metrics and Trends launched
Benchmark: Library Metrics and Trends

Data available includes:

- PLA annual topical surveys
- IMLS Public Libraries Survey
- Census Bureau’s American Community Survey
- Public Library Data Service (historic data)

librarybenchmark.org
Why Benchmark

Performance

Value

Impact
## BENCHMARK: LIBRARY METRICS AND TRENDS

<table>
<thead>
<tr>
<th>PUBLIC LIBRARIES have access to:</th>
<th>Free Access</th>
<th>Subscription</th>
</tr>
</thead>
<tbody>
<tr>
<td>PLA annual surveys</td>
<td>✅</td>
<td>✅</td>
</tr>
<tr>
<td>PLA annual survey reports with national results</td>
<td>✅</td>
<td>✅</td>
</tr>
<tr>
<td>Your library’s responses to past PLA and PLDS surveys</td>
<td>✅</td>
<td>✅</td>
</tr>
<tr>
<td>Selected data visualizations with peer comparisons</td>
<td>✅</td>
<td>✅</td>
</tr>
<tr>
<td>Account and contact management</td>
<td>✅</td>
<td>✅</td>
</tr>
<tr>
<td>Data-related resources</td>
<td>✅</td>
<td>✅</td>
</tr>
<tr>
<td>Interactive data dashboards with 100+ unique visualizations of PLA, PLDS, IMLS, and census data</td>
<td>❌</td>
<td>✅</td>
</tr>
<tr>
<td>Custom report builder with historical metrics</td>
<td>❌</td>
<td>✅</td>
</tr>
<tr>
<td>Create custom peer groups for tailored benchmarking</td>
<td>❌</td>
<td>✅</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Free</th>
<th>$400/year*</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>get up to 20% off with eligible discounts</td>
<td></td>
</tr>
</tbody>
</table>
Subscriptions

• Subscription types
  • Public library
  • Consortium / state library agency / group
  • Corporate
  • Individual consultant / researcher

• More info: https://www.ala.org/pla/data/benchmark

• Free webinar for groups on December 11: https://www.ala.org/pla/education/onlinelearning/webinars/datatools
MAKING EFFECTIVE PEER COMPARISONS

Katina Jones
Benchmarking

The process of comparing your organization’s performance with peers’ performance for purposes of improvement, decision-making, strategic planning, and advocacy.
Visualize

Dashboards

• Summary Data (includes selected charts from the other topic areas)
• Programs and Services
• Collections and Circulation
• Technology
• Staff
• Facilities
• Funding
• Community (pictured)

View any chart as a table or export the data
Filter

Explore and filter by:
- Survey Year
- Peer Group
- Library characteristics
  - Locale
  - Region
  - Population of service area
  - Legal basis
- Community characteristics
  - Percent persons of color
  - Percent college-educated
Primary Peer Groups

IMLS Public Libraries Survey

Peer Groups = groups of libraries that share similar characteristics
Peer Group Characteristics

- Region
- Legal basis
- Locale
- Percent non-Hispanic white
- Percent with a college degree
Custom Peer Groups

Filters to select:

• Locale
• Region
• Population
• Legal basis
• % people of color
• State

Custom peer groups you create show up in the Peer Group filter in the dashboard
Who are your peers?

General purpose
- Key library characteristics: locale, legal basis, service area population, state/region

Budget justification
- Service area population
- Number of branches/outlets
- Budget

Strategic planning
- Community demographics
- Annual programs/services
- Number of paid staff
## Custom Report

<table>
<thead>
<tr>
<th>Question Name</th>
<th>Your Library</th>
<th>Peer Group Median</th>
<th>Peer Group Average</th>
<th>All Median</th>
<th>All Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>11 (a) Total annual wireless sessions:</td>
<td>220,889</td>
<td>7,848</td>
<td>74,608</td>
<td>5,418</td>
<td>235,196</td>
</tr>
<tr>
<td>16. Does your library system or the entity that c...</td>
<td>No</td>
<td></td>
<td>72.5%</td>
<td>57.4%</td>
<td></td>
</tr>
<tr>
<td>3D Printing</td>
<td>No</td>
<td></td>
<td>19.3%</td>
<td>20.6%</td>
<td></td>
</tr>
<tr>
<td>8. Does your library system have a website?</td>
<td>Yes, conti...</td>
<td>100.0%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9 (a) Number of website visits:</td>
<td>1,456,570</td>
<td>66,270</td>
<td>283,743</td>
<td>17,454</td>
<td>186,060</td>
</tr>
<tr>
<td>A faster speed is not available in our service ar...</td>
<td>No</td>
<td></td>
<td>6.1%</td>
<td>34.6%</td>
<td></td>
</tr>
<tr>
<td>A mobile app created for the library (e.g., with ...</td>
<td>Yes (at lea...</td>
<td></td>
<td>74.1%</td>
<td>52.0%</td>
<td></td>
</tr>
<tr>
<td>Assistive technology use (e.g., screen readers, te...</td>
<td>Yes, infor...</td>
<td></td>
<td>37.2%</td>
<td>26.0%</td>
<td></td>
</tr>
<tr>
<td>Bandwidth (e.g., improved speeds)</td>
<td>No</td>
<td></td>
<td>58.7%</td>
<td>43.7%</td>
<td></td>
</tr>
</tbody>
</table>
Exploring Results

What does the digital divide look like in my community and how does the library address technology needs?

- Percentage of households with broadband
- Percentage of households with computers
- Library computers and WiFi
- Library devices for checkout
- Technology training

Does the library's staffing align with community needs?

- Population
- Ages: children, teens, adults, senior citizens
- Library visits
- Program attendance
- FTE per capita
- Numbers of staff
- Staff roles

Census data
IMLS PLS data
PLA data
QUESTIONS?
Sarasota County Libraries

- An overview of Sarasota County
- Our library system
- Benchmark for strategic planning
SARASOTA COUNTY
Sarasota County Demographics

- We have five municipalities
- Population ~ 462,000
- Culture of philanthropy and non-profit organizations
Our Library System

10 library branches
1 History Center

Approximately 166 staff
$18 million budget

1 Foundation, 11 Friends groups, 3 advisory boards
Dependent on partners and private funding
New Director Drama: 2019-2020

- Tasked with gathering statistics
- Comparing collection expenditures for a budget ask
- Disorganized mess
Moving to a Data Informed Culture: 2021-2023

Goals

• Using data for decision making
• Regularly reviewing data for improvements
• Working with data to tell our story
• Improved communications with stakeholders
Moving to Benchmark

- Custom reporting
- Cost/Value
- Peer reports
- Ease of use
- Scope
- Reliability
Benchmark and Strategic Planning

- Benchmark provided insights to performance
- Peer comparisons demonstrated strengths and weaknesses
- Allowed consultant to focus on qualitative processes
- Improved our messaging
Needs Assessment

**Programs & Services: Number of Library Programs**
- Your Library: 1,335
- Peer Group Median: 373
- All Median: 83

*Data Source: IMLS Public Libraries Survey (2021)*

**Collections: Total Collection Use**
- Your Library: 2,442,175
- Peer Group Median: 481,422
- All Median: 27,922

*Data Source: IMLS Public Libraries Survey (2021)*
Needs Assessment: Local Peers

**Programs & Services: Number of Library Programs**
- Your Library: 1,335
- Peer Group Median: 668
- All Median: 83

*Data Source: IMLS Public Libraries Survey (2021)*

**Collections: Total Collection Use**
- Your Library: 2,442,175
- Peer Group Median: 3,862,459
- All Median: 27,922

*Data Source: IMLS Public Libraries Survey (2021)*
NEEDS ASSESSMENT: LOCAL PEERS
NEEDS ASSESSMENT: LOCAL PEERS
NEEDS ASSESSMENT: LOCAL PEERS

*Data Source: IMLS Public Libraries Survey*
Valuable Features

- Quick snapshots
- Tables and visualizations
- Peer comparisons
- Demonstrates trends
- For strategic planning
  - Budget Trends
  - Collections
  - Library Use
  - Programs/Services
  - Technology
A Work in Progress

- Regularly reviewing data
- Working with data to tell our story
- Using data for advocacy
- Staff training on Benchmark
Why Benchmark?

EFFICIENCY
DECISION-MAKING
PLANNING
CONTINUOUS IMPROVEMENT
ADVOCACY
NEXT STEPS
Sara Goek
<table>
<thead>
<tr>
<th>Tutorials</th>
<th>Interpreting the Data</th>
<th>Surveys</th>
<th>Other Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>NEW Benchmark video tutorials</td>
<td>About Benchmark</td>
<td>2023 PLA Technology Survey Worksheet</td>
<td>FREE webinar: Benchmark 101</td>
</tr>
<tr>
<td>Learn how to make the most of Benchmark's features and peer comparison data for your library. The first ten videos in a new series are now available (Sept 2023).</td>
<td>Background on the tool and its development.</td>
<td>Survey worksheet (fillable PDF)</td>
<td>Get a behind-the-scenes look at Benchmark’s interactive and user-friendly data dashboards and reporting tools for public library subscribers. In this free PLA webinar on Monday, November 13, 2023.</td>
</tr>
<tr>
<td>Getting Started</td>
<td>Benchmarking</td>
<td>2023 PLA Technology Survey Instructions</td>
<td>Updates</td>
</tr>
<tr>
<td>Creating a Custom Peer Group</td>
<td>Peer Groups</td>
<td>2022 Services for Strong Communities Survey</td>
<td>Frequently Asked Questions</td>
</tr>
<tr>
<td>How to create a custom peer group for benchmarking.</td>
<td>An outline of the primary peer groups in Benchmark and the methodology used to create them.</td>
<td>Survey worksheet (fillable PDF), instructions, and glossary</td>
<td>Updated 09/27/2023</td>
</tr>
<tr>
<td>The Survey Metrics Dashboard</td>
<td>PLA Survey Data</td>
<td>2021 Public Library Staff &amp; Diversity Survey</td>
<td>Webinar recording: 2023 Technology Survey</td>
</tr>
<tr>
<td>How to navigate the dashboards, interpret the visualizations, apply filters, and see tooltips.</td>
<td>The Benchmark dashboards include data from PLA’s new annual topical surveys and historic Public Library Data Service (PLDS) surveys.</td>
<td>Survey worksheet (fillable PDF), instructions, and glossary</td>
<td>This free on-demand webinar provides an overview of PLA’s 2023 Technology Survey and covers why your library’s response matters (recorded Oct. 12, 2023).</td>
</tr>
<tr>
<td>How to use the Custom Report builder to view and export data.</td>
<td>The Benchmark dashboards include IMLS PLS data from 2006 to the most recent available.</td>
<td>Reference copy (PDF) of the 2020 Technology Survey.</td>
<td>An overview of the results of the 2021 Staff and Diversity survey, highlighting how the data suggests both opportunities and challenges for the future of public libraries (recorded Oct. 4, 2022).</td>
</tr>
<tr>
<td>Viewing Tables and Exporting Data</td>
<td>Census Data</td>
<td>PLDS Surveys 2011-2019</td>
<td>Webinar recording: Introducing Benchmark</td>
</tr>
<tr>
<td>How to view tables and export data for any charts in the dashboard.</td>
<td>The Benchmark dashboards include data drawn from the U.S. Census Bureau’s American Community Survey 5-year estimates.</td>
<td>Reference copies of all Public Library Data Service annual surveys, 2011-2019 (PDF).</td>
<td>IS A neuron data and staff introduction.</td>
</tr>
<tr>
<td>Group/Consortia/State Accounts</td>
<td>NEW: Use Cases</td>
<td></td>
<td></td>
</tr>
<tr>
<td>How to manage and review member libraries’ information (for group account administrators)</td>
<td>Four use cases demonstrating how public libraries could use Benchmark in practice (published June 2023).</td>
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</tr>
</tbody>
</table>
Use Cases

- Children’s programming
- Facilities improvements
- Ebook readers for accessibility
- Hiring a language specialist
2023 Public Library Technology Survey

Help PLA measure and share emerging trends around tech resources, infrastructure, digital literacy, staff, and budget. Participate now at librarybenchmark.org.

Participants will be entered into a drawing to win free group registration for a PLA webinar!
Subscribe

Login to your library’s Benchmark account

Link to the subscription form is at the top of the Home page

Participate in the survey and use your discount code!
Next Steps for Benchmark

• Data updated annually
  • American Community Survey 2022 estimates available in early 2024
  • IMLS PLS FY22 data available summer 2024
  • PLA 2023 Technology Survey data available summer 2024

• Continued improvements to the resources, dashboards, and interface
QUESTIONS?
THANK YOU!

Visit: librarybenchmark.org
Email: plabenchmark@ala.org