Library Trends Report

2015 STRATEGIC PLANNING INITIATIVE

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2015 Trends

Introduction

It has been an exciting few years for the Pueblo City-County Library District. From million-dollar automation projects to building three new buildings, not a month has gone by where the Library has not aggressively pursued an agenda of expansion and impact. As evidenced by 2014's Key Results, the metrics by which the Library measures its success, there has been a pattern of behavior at work that has brought the Library to new levels of operational standards. The question is, "Where do we go from here?"

Library Trends

To begin to answer that question it may be helpful to review the Library's performance against that of our peers. Among Colorado libraries serving populations over 100,000, PCCLD has established itself as a clear leader. In output measures such as visits per capita, circulation per capita, and program attendance per capita, PCCLD is at or near the top of the rankings among the 13 libraries. The Library is first for visits per capita in 2014, a rise of two positions from 2013. The Library is also first for program attendance per capita, moving ahead from position 2 in 2013. PCCLD is fourth for circulation per capita, a sharp rise from the ninth position last year.

Nationally, libraries have seen annual decreases in circulation per capita since 2010, an average of -1.25% per year. PCCLD has experienced an average 11.89% gain in this measure during that same period – an average 10.15% increase from 2010-2013 and a 49.30% spike in 2014.

Visits per capita nationally peaked in FY2009, and while the average of all reporting libraries to the Public Library Data Service (PLDS) survey showed a 6.7% increase last year, the trend continues to slow. PCCLD, however, has seen an 8.14% average yearly increase since FY2009, which includes a slight decrease in FY2011 (-5.35%) and a substantial gain in FY2013 (18.31%).

PCCLD ranks 15th for program attendance per capita of the 251 libraries nationwide with Legal Service Populations between 100,000 and 499,999 who reported to the PLDS survey. Many of the libraries listed ahead of PCCLD can be found in major metropolitan areas, so the Library's position in this category is remarkable.

Comparison data for the final Key Result for the Library, Digital Use, is not available, in large measure due to lack of national digital use tracking standards. Nonetheless, the Library's locally devised digital use data tracking indicates a rapid increase in computer and online database use in recent years.

Standards Review

The achievements of PCCLD in the last few years are certainly noteworthy. In an attempt to identify areas for growth and development, the Library recently undertook an internal review of services and offerings. Among the tools used were the Digital Inclusion Survey from the American Library Association, the Gates Foundations' Edge benchmarking tool which assesses public computing technology, and the Colorado State Library's Public Library Standards. In addition, the Library considered industry-specific key performance indicators for each functional

area of the organization, including Technical Services, Information Technology, Finance, Human Resources, and Community Relations and Development.

Public Computing Technology Surveys

Funded by the Institute for Museum and Library Services, the 2015 Digital Inclusion Survey attempts to "take the pulse of public library service in the areas of digital literacy, economic and workforce development, civic engagement, educational support, health information and public access to the internet."[1] Similar to the Survey, the Edge tool also provides an overview of Library services, partnerships and programming. The results of this tool include a wealth of actionable suggestions for improving, expanding or augmenting current offerings.

Initial findings from both tools indicate that PCCLD is adequately providing computing and technology resources to the community, including wireless internet access, and that the Library offers the requisite resources for meeting certain needs within a community, such as Basic Literacy services, GED services, job preparation and application services, and heath information needs. Compared to peer libraries of similar size (serving between 65,001 and 175,000 people) in the Edge tool, the Library scored 42% higher than the group average, achieving 825 of the possible 1,000 survey points. In the Edge breakdowns by Community Value, Engaging the Community, and Organizational Management, the Library scored well above average in many categories. In the areas of providing patron surveys and an annual survey, however, the Library scored below the average point value. One benefit to these tools, particularly the Edge assessment, are the 100+ actionable recommendations created based on the Library's responses. These recommendations range from easy to difficult to facilitate, extreme or little relevance or importance to a community, and from high to low cost. Detailed results can be accessed online through the Edge website.

Public Library Standards

Similar results were found when comparing the Library against the checklist of Colorado State Library Public Library Standards. The Colorado State Library (CSL) published the Standards in 2011. Included are minimum standards, such as those described in CSL's Definition of a Public Library, as well as benchmark standards which "point to best practices and striving towards excellence."[2] Opportunities for growth at PCCLD as identified by this review included:

- Collections: Adopt a Collection Management Plan that includes policies for conservation/ preservation and procedures for non-circulating items
- Facilities: Each service outlet must be open to the public no fewer than 20 hours per week (regarding the satellite locations)
- Governance: Library uses surveys and other feedback tools and measures to determine the effectiveness of its services
- Marketing and Advocacy: Develop, adapt, and implement a comprehensive public relations program that includes a marketing plan that reflects the community needs

Unlike the Edge tool, the Public Library Standards comparison does not consider certain factors in achieving these benchmarks, including cost and relevance to the Library's community.

Functional Area Performance Indicators

While the Public Library Standards set benchmarks to best practices, they do not include performance measures or metrics that might allow non-public functional areas of the Library to track internal performance over time. For some areas, a number of national or international standards guide local operations, particularly for Information Technology and Finance, and audits provide accountability according to these standards. For other areas of the Library, industry standard measures that are predictive of performance are not actively gathered. Performance measurement and management have become central to reporting accountability for governments, non-profits, and businesses; establishing and monitoring key performance indicators within functional areas can ensure operational sustainability and transparency.

Global Library Trends

Sustainability has been a key issue for libraries in recent years. The digital shift that the world has experienced in the last 20 years has dramatically changed not only how people read, learn, and access information, but also what they read, learn about, and find. As a result, libraries across the world have considered, and often reconsidered, their role as a public institution, as a place or knowledge and learning, and as a provider to free information. Added to this, the private sector has been incredibly successful regarding innovation in digital technology and has created a certain amount of competition for some of the Library's traditional offerings. The private sector's digital initiatives have also changed the way libraries procure, curate, and make collections accessible. The implications of this for the Library of the future are complex.

Libraries = Books?

In 2014, the library nonprofit OCLC released a report titled *At a Tipping Point: Education, Learning and Libraries*. In it, they detailed the results of their 10-year investigation into the brand of libraries across the United States. They found "sixty-nine percent (69%) of online users indicated that their first thought of a library was "books" in 2005, [and] 75% in both 2010 and 2014." [3] The public perception that 'libraries = books' remains strong today, indicating that the public's nostalgia for the library of yesteryear, their love of their idea of the Library, is pervasive. And yet, the 2013 Pew Research Center study *How Americans Value Public Libraries in Their Communities* found that while people love the Library, "'over half (52%) say that people do not need public libraries as much as they used to' (Zickhuhr et al., 2013)." [4] This slip in relevance could likely lead to a fading of the public's nostalgia and could affect library services in the future. "Thinking of libraries as they were ages ago and wanting them to remain the same is the last thing we should want for them," writes John Palfrey, the former head of the Harvard Law School Library, in his 2015 book *BiblioTech: Why Libraries Matter More Than Ever in the Age of Google*. [5] Relevancy of the library brand will be a key indicator in the Library's future health and sustainability.

And yet, there are some in the library world who remain convinced that the "book" brand is more asset than detriment and should become the core of library services. Steve Coffman, Vice President of LSSI, an independent provider of library services, believes that the future of libraries rests in the pages they've become known for.

> "But if [libraries] are to be competitive – we must stop apologizing for what we are; we must celebrate it. We must take advantage of new opportunities to help people discover good books. We must serve as a link between the print and digital worlds, because our patrons inhabit them both. We must find ways to spend more on our collections. And we must not hedge our bets – with our limited resources we can't afford to chase after every new idea that comes along, we must focus closely on doing one thing right – putting books in the hands of readers – and just say 'NO' to everything else." [6]

This can be a lot to ask of libraries. With the average public library spending only 15 cents of every dollar on content and collections, saying "'NO' to everything else" could dramatically shift the services a library provides. According to *The Library Resource Guide Benchmark Study on 2015 Library Spending Plans*, libraries nationally allocate 15% on content and collections. At PCCLD, the distribution is higher at 16.7%. However, 81% of libraries surveyed said that "this year, for the first time, the percentage of public libraries reporting decreased demand for print materials is exceeding the percentage reporting increases." [7] And while demand for print nationally is decreasing, average library spending does not necessarily reflect that shift, with 56 cents of every dollar spent on collections going toward printed material and 26 cents to digital, figures that are flat compared to previous years.

Books and Beyond

Currently, the Library envisions more than books in its future, as stated in the Library's Vision, "Books and Beyond," and has worked diligently to meet the expanding technological and informational needs of the community. The Library is not alone in exploring new ways to incorporate technology into traditional products and services. The ConnectED Initiative announced by President Obama in 2013 highlights this trend on a national level. The program aims to "empower teachers with the best technology and the training to make the most of it, and

empower students through individualized learning and rich, digital content."[8] The program plans to upgrade broadband internet connectivity to schools and libraries, train teachers on using digital education tools, and seek assistance from the private sector to provide digital devices and personalized software to students.

Libraries across the country have also begun to innovate ways in which they can extend digital technology access to students beyond the classroom with the concept of Learning Labs. In a report on the subject issued by the Urban Libraries Council, the focus of Learning Labs is to provide Connect Learning spaces, where "learning is interest-driven, socially relevant, and aimed at expanding educational or economic opportunity"[9] and where mentors engage young people in spaces designed to foster communication, growth, and experimentation. Examples include makerspaces, media labs, and other spaces where 'messing around' is encouraged as a means for learning. In many libraries, these Learning Labs are not restricted to use by young people. Chattanooga Public Library's "4th Floor" space includes a "Gig Lab" that offers high-speed Internet connectivity for the public to explore, collaborate and create using applied arts. The Skokie (IL) Public Library created a Learning Lab for entrepreneurs where they can work, conduct meetings, and receive technology access and support from an on-site MBA-degreed librarian.

While many library initiatives around 21st century educational concepts focus on places or partnerships with schools, the Urban Library Council has also stated that libraries are uniquely poised to bring the community together through partnerships and collaboration around lifelong learning "at any time, any place, any path, and any pace."[10] They note that libraries are aware of the changing needs of their communities, they connect with people from birth through senior years, they provide mentorship on building technology skills, and they are very good at building partnerships – all assets that support the Library's mission of lifelong learning.

By the Numbers

One of the challenges of understanding the Library's success at 'Books and Beyond' is figuring out how to measure it. For many decades, the Library has measured 'Books' by looking at the return on the investment: how many times a book checks out, cost per circulation, and circulation as a percentage of overall collection use. When it comes to measuring programs and services, and whatever else may be 'Beyond,' the Library is faced with the problem of outputs versus outcomes. The former relies on transactional, countable actions (as in, the number of people who attended a program). The latter relies on how a program attendee would answer the question, 'How has your attendance at this event impacted your life (or employment, or education)?' For many years, outcome-based assessment has been common across many industries in both private and public sectors, and yet it remains elusive for libraries because of the lack of standardized, affordable data collection and reporting tools. In the fall of 2014, the Public Library Association organized a task force to develop a national model for outcomes-based performance indicators for public libraries, but as yet they have not conclusively identified methods for measuring the Library's community impact, though they have solidly identified the need for them.

Collective Impact

Measurability aside, collective impact continues to be a predominate theme in futures-oriented library literature. In a recent article for *American Libraries*, Miguel Figueroa, Director of the American Library Association's Center for the Future of Libraries, writes that communities are looking for better coordination among local organizations to address priority needs, and libraries should align themselves strategically with local entities and their community-driven agendas.[11] The Aspen Institute, an education and policy studies organization in Washington, D.C., found the same in their 2015 *Dialogue on Public Libraries*. Of their four 'Strategies for Success,' two refer to "align[ing] services to support local community goals" and "cultivat[ing] leadership" within a community so that libraries can build communities that "thrive and succeed together."[12] In 2013, a consortium of Colorado nonprofits and foundations worked to establish a set of community indicators around education, economic or financial wellbeing, and health with the aim of measuring the success of collaborations among local organizations, possibly providing a path for library and related agencies to mark their success in partnerships that have collective impact. The Library of the future may be well-positioned to capitalize on the talent and expertise

of its staff and stakeholders in an effort to build a sustainable, healthy community and successfully meet the goals of its mission and vision.

Conclusion

PCCLD has experienced incredible growth in recent years, both by the numbers and by the number of buildings. The services, programs and collections the Library offers are high demand. While to continue this trend of rapid growth may be unfeasible in the next few years, the Library should consider ways to maintain the levels of circulation, program attendance, visits and digital use as current levels indicate that the community values these offerings.

As the world sees continued acceleration in the innovation of digital technologies, the Library should consider ways to balance collections, programs and other services in light of community needs and industry advancements. The digital divide, or the economic and social inequality in the ability to access information and communication technologies (such as computers, internet and smart phones) continues to be an issue for the Pueblo community and will increasingly become a barrier to accessing information, services, and reading material in the coming years.

At the same time, the Library is well positioned to continue and augment lifelong learning within the community. Through strategic partnerships that leverage collective impact on lifelong learning, the Library will find itself in line with national trends toward sustainable futures. As technology, manufacturing, education and many other private and public sectors continue to adapt and change to the burgeoning creative economy, the Library should consider in what ways it may adapt and grow to meet the evolving needs of the Pueblo community. An outcomes-based assessment tool could significantly assist the Library in ongoing evaluation of it success in meeting its mission of encouraging the joy of reading, supporting lifelong learning, and providing access to information from around the world well into the future.

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