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How Library Management Systems can demonstrate value for money from information and library services

Penny Bailey
Bailey Solutions Ltd.

Abstract
Statistics and other evidence from library management software can be used to justify continued funding of library staff and resources and defend library and information services from funding cuts or closure. This article looks at how the different modules of integrated library management software and, in particular, enquiry tracking software can be used to increase operational efficiency thus providing the best value from current investment. It considers how the integrated library management system can be used to demonstrate how library and information services (LIS) are aligned with the wider organization's business objectives and are therefore a necessary function for the organization. The author also looks at the potential of library management systems for enabling the library and information service to contribute to income generation so changing the perception that they are a drain on resources. Of the functionality of library management systems. Enquiry tracking software in particular can help prove the value of library and information services and resources to senior management.

Keywords
enquiry services, enquiry tracking software, evidence-based management, funding cuts, integrated library management software, library and information services, library funding, statistics

Introduction

When times are good it is easy to be complacent about budgets for library resources and staffing levels. One can easily assume that there will always be money for Information and Library Services. But in the last few years, finance directors have been looking hard not only at staffing levels and library resources but also at whether the Information and Library Service is even necessary. They ask if the service can be outsourced or if it can be re-organized geographically to make effective use of a globally available workforce. Moreover, as the physical collection shrinks in the move to electronic resources and virtual existence, Finance Directors cannot see the need for staff to look after what they perceive is only a small collection of printed materials. Library and Information staff are being made redundant, budgets slashed, and libraries are closing or being outsourced.

Are Finance Directors missing the point? Well yes and no. It is their job to look for money savings, greater efficiencies, and increased value from investment. The reaction of Library and Information staff is, quite naturally, to feel threatened by this scrutiny. But is it not also the job of the Library and Information Manager to look for money savings and greater efficiencies and to work for the common good of the organization? It is, of course, but how can the outcomes be different and still demonstrate value for the organization?

This is where facts and figures come into play. Hard statistics are what Finance Directors and senior managers understand and Library Managers can obtain these from their Library Management systems. This article looks at how you can influence perceptions and outcomes for your Library and Information Services using features and outputs from your Library Management system.

Demonstrating the Value of the Enquiry Service

Whenever a Library and Information Service is closed or reduced in capacity there are two possible contexts – the service has not been pulling its organizational weight or there has been quite simply a failure to understand how the service is contributing to the overall aims of the

Corresponding author:
Penny Bailey
Email: penny@baileysolutions.co.uk

organization – it is seen as unnecessary and therefore expendable. Studies in the academic sector have highlighted the contribution of the library to student success[1] and the value of libraries in supporting research.[2] In both cases statistical evidence is required to make the link and the emphasis is on quantitative data. Similarly in business libraries, statistical evidence is required to show how the Library and Information Service contributes to the goals of the organization. In business libraries there may be a correlation between the quality of information provision with job satisfaction and consequently staff recruitment and retention. The library service could demonstrate how it has increased productivity of staff. Assistance with meeting compliance requirements and cutting down on negligence risks associated with out of date or lack of information, are other areas where the library provides support to the wider organization. The library service could also provide evidence of its contribution to business development through its market research.

The trouble is how do you gather all this information? A gate tally of the number of enquiries is no longer sufficient and more sophisticated tools are required. The enquiry module of your integrated library management software or enquiry tracking software in its own right is often overlooked as a source of valuable data. Despite the fact that enquiry work takes up a large part of the librarian's day; it seems to be the poor relation when it comes to software tools. By using the right tools at three different levels: the enquiry desk staff, the enquiry team leader and the library and information services manager or director; the statistical information needed as evidence should be efficiently produced as part of the enquiry work process, starting with the point of collection.

Improving the Enquiry Handling Process

In many libraries and information units enquiries arrive in a number of ways – in person, by telephone, by email or by post. There are a number of problems with this *ad hoc* approach. Who does the enquiry come to? How does it get recorded? How does the enquiry handler collect vital information about the user? Is this collection of user data repeated every time? How do enquiry desk staff meet deadlines, particularly when there is a rota for staffing the enquiry desk? How do staff check to see if something similar was done before if enquiries are stored in email in-boxes? What record is there of the work done to answer the enquiry? How much time was spent? What costs were incurred answering the enquiry? Is enquiry work done outside of a tracking system perhaps on paper and by email and then keyed-in after the event?

Well-organized and conscientious enquiry desk staff will make sure they meet their deadlines in the right order, hand over efficiently to the next person on duty and accurately record time, costs, user details and the number of enquiries they handled. Users of the enquiry service may prefer to send an email and may need to do so via their mobile phone when they are out of the office. Enquiry staff may prefer this way of working and will consider that it helps them to feel they are in control of their work. Even so they will not be working at their most efficient. Not having one centralized store of enquiries and the work done to answer them is a considerable disadvantage when value needs to be evidenced. If enquiries are stored in email in-boxes they cannot be shared, re-directed, monitored, re-visited or published easily. Some organizations recognize these problems and try to solve them by developing an in-house database or imposing the use of an IT help desk system on the library. Whilst these measures go some way to providing a single repository, an in-house database will not usually integrate with the email system and an IT help desk system is not designed for enquiry management.

Dedicated enquiry tracking software, on the other hand, can include an email messaging system to handle the correspondence – both in and out. It is important that the software helps enquiry desk staff to collect and process enquiries from start to finish so that no data has to be re-keyed into the system as this will be (quite rightly) resented as an extra task. Collecting information about the user should be as easy as picking the name from a list, and collecting the user data (email, address, department, course, office, etc) should need to be done only once in a purpose-built system. The recording of costs can be made more efficient by providing a menu of resources used, ranging from printed library resources to online databases, external library services, document delivery services and outsourced information workers. The cost per unit is set up in the menu and all the enquiry desk staff have to do is select the resource and enter the quantity. An enquiry tracking system should present a list of enquiries in deadline or priority order for each individual enquiry handler, ensuring deadlines are not missed. A timer will help with accurate recording of staff time. And a centralized system allows for handover from one member of staff to another. The system also allows for working smarter by searching to see if anyone else has done anything similar in the past and re-using research or knowledge gained from a previous enquiry.

By introducing an enquiry tracking system the enquirer should experience an improved service. Using a web form will make it easier for enquirers to submit questions with the required information collected and added to the database at the point of collection. Nor will they have to supply their contact details every time they make an enquiry once they are registered in the system. The enquirer can follow the progress of work done on their enquiry and, on completion, receive a full print-out detailing costs and time spent. It is also important to ask enquirers to rate the service received so they can give valuable feedback.

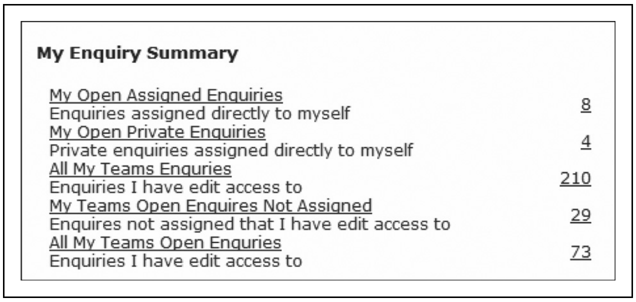

Figure 1. Team leader's view of the workload, partial screenshot from KnowAll Enquire.net ©

Increase Team Efficiency

Working to the optimum, the job of the enquiry team leader or manager is to:

- Ensure there is an evenly distributed workload within the team;
- Manage the staff rota;
- Assign enquiries appropriately according to subject knowledge and abilities of the individual;
- Monitor the performance and efficiency of individual team members and identify training needs;
- Ensure service level agreements are met with particular regard to deadlines;
- Monitor the quality of the service;
- Ensure appropriate resources are sourced to undertake enquiry work;
- Monitor outsourced information workers and other external services;
- Market the service to all potential sectors;
- Transfer data about costs to the central finance system.

Obviously if enquiries are sent to individuals as emails, achieving the above is pretty difficult and the following issues may arise: What happens to enquiries in an email inbox if the enquiry handler is away? Does one person get more overloaded than another? Is the recipient of an email enquiry the most appropriate person to deal with it?

The team leader needs evidence to support the following decisions about the running of the service:

- Assessing the workload of the team – needs to know the
2 number of live enquiries – see Figure 1;
- Reviewing the workload of individual team members and re-assigning as necessary;
- Re-assigning enquiries when staff are unexpectedly absent;
- Finding out the average enquiry time across the team as a benchmark for team performance;
- Monitoring the customer satisfaction record, average completion times, and deadline compliancy record of individual team members, in order to set SMART (Specific, Measurable, Achievable, Realistic, Timed) objectives in performance reviews;
- Identifying knowledge gaps of individual team members – assessed by examining the customer satisfaction by type of enquiry or by subject of enquiry;
- Obtaining statistics on the number of enquiries completed by the deadline;
- Reviewing customer satisfaction records;
- Obtaining statistics on the departments, geographical locations, types of users, courses or other sector breakdowns to understand take up of service by sector and market accordingly;
- Reporting on resources used to justify continued subscription or cancellation;
- Obtaining statistics on the performance of external services and assess how well they meet their Service Level Agreement (SLA);
- Extracting aggregated data for costs and time spent in a standard format for processing into the finance system to avoid re-keying of data.

It hardly needs saying that without a dedicated enquiry tracking system the information a team leader needs to achieve their objectives is difficult and time consuming to obtain. And a well run and appreciated service is less vulnerable to staffing level cuts.

24 hour Global Enquiry Services

Enquiry tracking software also opens up the possibilities of offering a 24 hour global enquiry service. If all the enquiries are in one system which handles different time zones and currencies for various geographical locations within the organization then enquiries can be picked up by enquiry handlers in different locations according to their working hours. If lawyers in London are working through the night and need some information, they can email the library service and it can be picked up by enquiry handlers in a different time zone who work on it during their own office hours. Deadlines are converted for all concerned. I know of one global law firm which is planning to re-locate its enquiry service from London to a less expensive office location, using its enquiry tracking software to facilitate moving work to available enquiry handlers whilst still retaining the enquiry service in-house.

Qualitative Management Information

Additionally the director or overall manager of the Library and Information service needs access to meaningful qualitative data to prove the value of the enquiry service to senior management. The enquiry tracking system will help directors easily produce quick and accurate on-demand reports which provide evidence of the following:

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Monthly Usage Report - 01 Jan 2010 to 01 Feb 2010

Office	Enq's	Enq' Worklogs	Total Time (hrs)	Intern' Time (hrs)	Intern' Cost (£)
Central Brighton	287	543	551	392	3725
Department					
Accounts and finance	129	245	178	148	1503
Request Type					
Company Financials	22	42	24	20	232
Company General	32	45	25	21	221
Complaint	2	3	33	29	239
Case Law Other	12	25	23	23	243
Case Law UK	52	106	45	40	463
Freedom of Information	5	16	12	5	60
Media Line	4	8	16	10	45
Administration	18	36	72	62	527
Distribution	13	23	29	19	148
General	28	42	51	41	318
Hr	36	86	144	66	671
Insurance	63	111	77	56	558

Figure 2. Monthly usage report from KnowAll Enquire.net enquiry tracking software ©

- That whilst the number of enquiries has gone down, access to enquiries published as FAQs on the website has increased;
- The average time spent on enquiries has decreased – staff are working more efficiently;
- Customer satisfaction records have improved or remained at high levels;
- The amount of time spent on enquiries – to justify a need to increase/retain staff;
- The number of enquiries supporting business development and new business won;
- The types of enquiries the service handles; this is important to be able to link the work done by the Library and Information Service to business objectives;
- The market sectors or user groups which use the enquiry service;
- Costs saved by using library staff compared to other (more expensive or less efficient) personnel in the organization. (This information can be obtained by designing the customer rating survey to include a question on how long the enquirer thinks they would have spent if they had done the research themselves);
- Use of external resources/services and their ratings in order to justify continuing or discontinuing use of those resources/services.

When running a professional enquiry service it is vital that structured data is collected as a natural part of the enquiry handling process. This data will help enquiry staff at all levels to continuously review and improve performance, both individually and across the team. In turn the extracted statistics can also be used to provide evidence of the value of the service and demonstrate how it helps support improved productivity for the organization as a whole.

Marketing the Library Service

Marketing should be a core activity for library managers. Good marketing practices require knowledge of your market sectors and segments. Who is using your service, and more importantly who is not, is vital marketing data. *How* they are using your service is another key indicator. Blindly doing enquiries and being grateful when you are less busy is a blinkered approach to running and working in an enquiry service. Library managers also need to know what alternative resources and services are used instead of the library, which means asking the right questions. All this information can come from qualitative statistical reports produced from your enquiry tracking software. A respected library and information service will know who its customers are and what they want and make sure that customers come to the library for their information requirements and are satisfied. For more information about marketing your library services see *The Visible Librarian*[3] and *The Accidental Library Marketeer*.[4]

Fee Generation

From the Finance Director's point of view library staff can be perceived as an overhead (and sometimes they are even referred to as 'fee-spenders'). To counteract this perception, business libraries may decide to account for library time using the cost centre approach. This can be an effective way of demonstrating value by enabling costs to be charged to a client to show that the function is a profit-generating centre or certainly a fee generating department. This practice is more common in the US but is starting to happen in the UK.

Enquiry software offers stopwatches to measure time accurately. Even if you are not operating as a profit centre you should be able to easily produce a report for the enquirer showing time spent so the fee-earner can decide whether to charge it to the client and the hourly rate to apply. Fee-generation may also be suggested when facing staff cuts as a mechanism for proving that library staff help generate income for the business and save money by doing research work at a lower hourly rate than the fee-earner might charge.

Outsourcing the Library Enquiry Service

Outsourcing the enquiry service, or even the entire library and information services operation, either to a UK based company or off-shore service has arrived in the UK. Whether outsourcing library enquiries creates efficiencies and an improved service is contentious,[5] (see the cover articles in *CLSIG News* May and July 2010), but if a decision has been made, the manager responsible for outsourcing enquiry work needs to monitor, measure and rate the outsourced service. Enquiry tracking software can also be used to ensure that more sensitive or complicated enquiries are handled in-house and standard enquiries off-loaded to the external service. Ideally, monitoring of the service both before and after outsourcing would provide valuable information about whether the outsourced service is actually delivering better value for money and to evidence whether the decision should be reversed.

Loans Module

Traditionally the Library Management System (LMS) module which is most often used to provide statistics of library usage is the loans module. Surprisingly some business libraries still use card or book based systems for loans even when a loans module is available with their LMS. There are a couple of key problems with using a manual system. First, it is much more difficult to record and keep track of transfers from user to user. These happen more typically in a business library because they occur in staff offices or satellite/departmental libraries i.e. away from the point of record. A manual system does not save anyone's time – users must come to the library to see if an item is on loan when it could be with a colleague close by and they are unlikely to record a transfer if they have to make a trip to the library. Library items get lost and time-consuming emails are sent round on a regular basis to see who has a sought after item. Second, it is time-consuming to gather statistics. Modern loans modules also provide another measure of usage by recording when material is used in the library but not actually borrowed. Loans module reports that identify the resources that are not borrowed, can contribute to decisions about whether or not to purchase those resources again.

The web OPAC plays a key part in recording loans because self-loan and self-return functions allow accurate recording of a loan in the first place and further tracking of the item if it is then passed to another user. Users can see where the item is and track it quickly without leaving their desk. Return on Investment (ROI) for an entire library management system can be made solely on the basis of the time savings made for fee-earners in this area. Improving the loans processes should be linked very firmly to increased user productivity.

Usage Statistics

With the move to electronic resources, different usage measurements are required. E-books require monitoring for licence and payment purposes. Electronic journal and database resources need to be monitored by the number and type of searches made; this data also informs the library staff about the type of content required and how users are exploiting the resources provided. Library and Information Services staff should undertake the trial of new online resources to ensure that likely use justifies the purchase of new content. Qualitative data can again be linked to business objectives and show support of risk avoidance, compliance and business development activities. All usage statistics, whether for print or electronic resources, provide data for evidence-based purchasing decisions. Scrutinizing search data can enable the library and information service to compare how long users take to do online research with the time taken by library staff and also whether resources are used appropriately by users. This contributes to evidence that library and information staff are efficient and knowledgeable in retrieving information.

Charging Back Costs

Spending on library resources can be seen as a black hole of expenditure by the Finance Director and again as an overhead to be cut when times are lean. Where possible all costs for usage of information resources which are not free should be recorded and assigned to jobs for clients or business development, so the fee-earner can decide whether to charge the client for the costs incurred as disbursements. The enquiry tracking module should pick up costs incurred by enquiry handlers whilst the costs for searches done by practitioners themselves can be handled by the acquisitions module and extracted using reports. In each case the cost could be linked to a client and a job code to facilitate charging back.

Expenditure Reports

Reports from the acquisitions module can be used in a number of ways to show that library staff are monitoring library expenditure and actively working to reduce costs. Politically it is beneficial to the library manager to be seen by the Finance Director as a trusted ally in cost containment. Acquisitions reports can work in the following ways:

- To produce an itemized report for each budget holder for periodic review;
- To ask the budget holder, when a new subscription is added, if other subscriptions are now redundant or if a title can be cancelled to offset the new cost;
- To produce year on year reports of subscriptions by supplier as the basis for negotiations to keep price rises within a set limit (for more information about negotiating licences for digital resources see Fiona Fogden's book *Negotiating Licences for Digital Resources*);[6]
- To supply the Finance Director with a report of cancelled subscriptions and the money library staff have saved by encouraging their cancellation and to report directly on savings library staff have achieved on subscription expenditure as a direct result of their actions;
- To demonstrate that how the move to electronic resources makes it easier to monitor usage and charge back costs to the client;
- In addition if the move to electronic resources has enabled the Library and Information service to request a reduction in space, this provides further evidence of responsible management to your organization.

Enhanced Bibliographic Data

Unlike academic and public libraries, business libraries have been slow to take up the benefit of downloadable catalogue records. Even if you have to pay a small extra subscription fee make sure you use your LMS's automated cataloguing tools to download bibliographic records from Amazon, COPAC, Nielsen and other sources of data, including data from subscription agents and library suppliers. New sources of data are being added all the time to LMS automated cataloguing tools. The data often includes such enriched data as book jacket images, reviews and abstracts. By doing so you will be saving staff time and offering your users content that looks like, and competes well with, external website content

Web OPAC

The Web OPAC is an opportunity for marketing your services. The home page is an ideal place to help your customers to know you by listing your staff, their professional qualifications and how they can assist the organization. You can also publish your open hours for your different locations. Encourage use of your enquiry service with an 'Ask a librarian' link which directs the enquiry straight into the enquiry database ready for assigning to an enquiry handler. Some enquiry systems offer various templates for different types of questions which make sure that the right information is collected at the outset for the enquiry handler to know what is truly being asked, thereby reducing the amount of requests for further clarification back to the customer.

Modern web OPACs integrate with intranets and extranets as a given whilst some take this a step further by offering links to dynamic searches which can be embedded in any intranet page (not just the library pages) to push content out to users on departmental home pages. For example a search which effectively produces a subject bibliography of resources for a particular activity or group of people, ensures that you are connecting specifically with different market segments and meeting their needs without them even coming to the library home page.

Another web OPAC feature that satisfies users' needs with little effort on the part of library staff is subject alerts. Users can select one or more subjects that interest them to receive automated email alerts when a new item about that subject is added to the library collection.

Serials Management Linked to Risk Management

As a background operation, serials management may not jump out as an area for proving your value to your organization. Senior management is probably not interested in serials management and may not even know what it is. But try linking serials management to risk management and compliance and suddenly it becomes interesting. Many organizations rely on their library to keep up to date with the law for compliance purposes. Construction companies need the latest building regulations; food manufacturers need access to the latest statutory food handling, safety and labelling information; lawyers need access to ever changing legislation and case law; and finance institutions need to make sure they are compliant. Make the link between risk and serials updating using a mixture of anecdotal and statistical information. For example, what are the potential negligence risks for a lawyer advising on a multi-million pound deal using an out of date copy of the *Take-over Code*? What are the potential costs for a food manufacturing company if the packaging carries non-compliant information and needs to be re-printed if the company is not to incur fines and loss of reputation? This is valuable anecdotal evidence which needs to be backed up with figures about how many titles are updated and how many issues you have checked-in or claimed. This gives value to the task of checking-in serials and filing loose-leaf updates which otherwise can be perceived as an administrative task that is not important and therefore expendable or not worth doing properly.

Conclusion

Library and information professionals who practise rigorous evidence-based management of their library services; who offer improved services based on sound marketing techniques; and who regularly report upwards their achievements with proven customer satisfaction and business results are less vulnerable to cuts. The library management system is sometimes overlooked as a source for that evidence whilst the enquiry service is often woefully inadequately measured and managed if the right software is not in place. Enquiry management software can facilitate gathering data during a rapid and intensive and work flow process where the enquiry handlers are intent on answering the enquiries correctly by the deadline. Doing the work is only one part of the job. Showing how valuable it is in contributing to the success of the organization, even when not asked, is vital for survival.

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Biography

3