LUCIDEA

The Power of Transformative, Integrated, Measurable Request Management

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Introduction

Building on our prior years' SLA Hot Topics sessions, *"Adapt, Act and Thrive"*, "*Building the Resilient Library*", "*Doing More with More*", "*What Does Success Look Like?*", and the themes drawn out during last year's equally successful session, "*Don't Just be Integrated, Be Integral*", at this year's Special Libraries Association conference we sponsored both the sixth (*Don't Just be Integral; Be Aligned!*) and seventh in our discussion series on library sustainability, focused on: "*Transformative, Integrated, Measurable Request Management*".

Handling research requests is the most visible thing that special librarians do, but unfortunately the significant positive impact on the organization is too easily ignored by senior management. Our panelists explored ways to optimize research and request workflow, including how to capture and interpret relevant and powerful metrics.

During this year's Hot Topics session, moderator Emma Hathway and our panelists discussed fundamental questions, such as:

- Why is it important to **capture the entirety of your request and research activities**?
- What are the **benefits and value** of capturing this information—to the organization, to the library, to the individual?
- How, why and for whom should you collect and **measure data related to reference requests and research**?

Panelists Samantha Bouwers (Librarian, ACT, Inc), Andrea Bruce (Knowledge & Information Research Professional, Hatch), and Alaina Kolosh (Manager, Library and Information Services, National Safety Council), covered topics such as:

- Customer satisfaction
- Knowledge gaps
- Training gaps
- Return on your resource investment
- Return on the organization's investment in the library or knowledge center

Program Take-Away

During the session, participants refreshed their understanding of the importance of transparency in the research and request management process, selecting the "right" metrics and expressing them through management reports, and the critical importance of evidence-based decision-making.

This whitepaper presents information shared during the event, combined with additional valuable insights gained from panelist interviews conducted in preparation for the discussion.

Presenters

- Samantha Bouwers—Librarian, Information Resource Center, ACT
- Andrea Bruce—Knowledge & Information Research Professional, Hatch
- Alaina Kolosh—Manager, Library and Information Services, National Safety Council

Moderator Emma Hathway, Lucidea's Director of Client Services, facilitated the discussion—adding perspectives drawn from her own experiences as an information provider within the professional services sector, and with leading a team dedicated to supporting new and existing clients across the Lucidea product portfolio, around the globe, and in many different sectors.

Organizations Represented

ACT

ACT is a mission-driven, nonprofit organization dedicated to helping people achieve education and workplace success. ACT is trusted as a leader in college and career readiness, providing high-quality assessments grounded in nearly 60 years of research. ACT offers a uniquely integrated set of solutions designed to provide personalized insights that help individuals succeed from elementary school through career.

Hatch

Hatch is a global, multidisciplinary, management, engineering and development consultancy, with 9,000 staff in 70+ offices and experience working in over 150 countries. Hatch provides consulting, operations support, technologies, process design, and project and construction management in the metals, energy, infrastructure, digital, and investments market sectors. It is an employee-owned and independent business, with diverse teams that combine vast engineering and business knowledge, working in partnership with clients to develop market strategies, manage and optimize production, develop new game-changing technologies, and design and deliver complex capital projects.

National Safety Council

The nation's leading safety advocate for more than 100 years, the National Safety Council is a nonprofit organization with the mission of eliminating preventable deaths at work, in homes and communities, and on the road through leadership, research, education and advocacy. NSC advances this mission by engaging businesses, government agencies, elected officials and the public to help prevent the third leading cause of death in the U.S. – preventable injuries. A 501c3 nonprofit, chartered by

Congress, with local Chapters, global networks, and more than 50,000 members, NSC is committed to helping keep people safe wherever they are.

Insights and lessons learned

During the session each of the panelists addressed three main topics from their own perspectives and combined experience. Facilitator Emma Hathway began the discussion by teeing up the first question:

Why is it important to capture the entirety of your request and research activities?

Per Samantha Bouwers, "I can't imagine why you wouldn't. This is really the bread and butter of how we get funding for the ACT library; how we justify our existence within the library … you begin with leveraging the information to articulate your organization's return on investment in your department."

At the National Safety Council, they're always educating staff on what the library provides, most especially those new to the organization—including a new President who started right before Alaina Kolosh attended SLA and participated on this panel. Per Ms. Kolosh, "If you look at my space, it looks like I just have books and old NSC products; you have to explain to staff that the work I do touches every other department in the organization. I work with our publications team. I work with our occupational safety and health staff, in addition to all of our managers. I'm always educating and explaining and demonstrating with hard numbers—which sometimes can be hard to come by in the safety field. We are always trying to show our impact."

At Hatch, per Andrea Bruce, "Advocating for ourselves and our role is one of the main things that we in the Knowledge and Information Resource Center (KIRC) consider when we're thinking, 'Why are we managing these requests? Why is this important?' A lot of the time people don't know exactly what we do, new hires particularly. They come in and a lot of them are saying, 'I've never worked at an engineering company that has a library before.' They might have some understanding of what a library, in general, does—but then they look at us and they think, 'What is it that you do?'

Ms. Bruce routinely tells KIRC clients that the physical collection is "just a drop in the bucket; we can do research for you, we can manage subscriptions and memberships for you, and we can point you in the right direction." Keeping track of the details of all those activities is critical; "We need to be able to look back and think, 'Where are we not connecting with people? Are there reasons people don't know what it is that we do? How can we show them, and how can we show them better?'"

Extending the conversation, Samantha Bouwers remarked, "I think corporate libraries are really undergoing a shift from being stuff-providing entities to service-providing entities. I can tell you my library has 25,194 books in the catalog and 190 of them were checked out last month or something. But what's really more important is exactly the value that you bring beyond that, because anyone can buy stuff. Maybe I have more money to buy stuff than some other departments, but that's really not where my value lies. It's important to be aware that hard metrics are only a part of the story.

Further to that, Ms. Bouwers explained that ACT has three strategic pillars, so, "If I can tie my research activities back to those three main pillars of the company, and say, 'This research specifically supported our goal of integrating our products and services across the continuum', or whatever the case is, it proves our value tying directly back to organizational goals."

What are the benefits and value of capturing this information—to the organization, to the library, to the individual?

Leading into the next question, Ms. Hathway pointed out the need for really visible contributions that make the library's contribution to the organization obvious. First up was Alaina Kolosh, who explained that at the National Safety Council, in addition to answering member and staff inquires, she works with the Grants department. "That's an area where you really have to document everything; what sources you used, what you looked for, how long it took, etc. Also, our organization bestows awards, so I get involved in that—I do background checks as part of the due diligence on the recipients. And, I've recently taken on working with the Fundraising and Development team, and there's a great deal of tracking involved with that. By the way, we used to leverage external consultants for that research, and we brought it in house. With the request management statistics I keep, I'm able to say "Look what I've provided, and look how much money we've saved by doing this internally"'.

The demonstrated benefits to the organization in this case include enhanced credibility, evidence-based decision making, and cost savings.

Per Andrea Bruce at Hatch, "Being in a private organization, it would be easy for leadership to say, 'The library isn't necessary anymore'; request management statistics provide powerful backup when we say 'No!' We can actually show people what we've delivered, and what we're working on. We can say 'this is how and why Hatch's employees rely on us.' I think request management reporting is one of the best ways you can show value. We put together our own annual reviews, and a significant portion of those reviews is demonstrating the organization's return on investment in the library."

Part of the KIRC's analysis includes quantifying savings—in time and money. They look at their cost of subscriptions, memberships and databases and with employee feedback, are able to quantify what Hatch would have spent if they did not have access to those resources. They also compare the cost of engineer time spent looking for information versus KIRC staff time doing the same research, and can demonstrate that cost savings. Per Ms. Bruce, "Those metrics give us a way to say 'This is why we're here'. It ties back to something I was taught when working on my library and information sciences degree: always be advocating for yourself. Leveraging request management data and preparing our own annual reviews, then combining them is one of the best ways we can advocate for ourselves. Circling back, demonstrating to your organization the department's value is such a great idea because it also proves something to you and to your team; it demonstrates collective worth and can keep the team together, and functioning, and coherent."

Continuing the theme of saving money for the organization, and documenting that, Samantha Bouwers discussed the benefits from tracking the amount of time spent on requests. At ACT, they track requests using the READ scale, which rates requests from 0 to 6, with 6 being the most difficult type of request. Per Ms. Bouwers, "That's where we want to be spending the bulk of our time because obviously that provides the most value to the organization. Those are questions such as, 'How much money is this competitor making?' 'Who else in this space is doing that?' 'I'm going to write a review paper on this incredibly intense psychometric topic,'—and I want to support those level 6 requests. A level 2 request is something like document delivery, or filling an inter-library loan. Or maybe it's a piece of information that I'm pulling repeatedly, for some department.

From a process standpoint, then, I can say, 'If there is some kind of low-level request down in that 1, 2, 3 range on the READ scale that I'm spending half an hour every time doing, I need to improve that process.' That's clearly a benefit to both the library and to the organization to say, 'I can eyeball that in my tracking system and observe that I answered the same level 2 question four times in a month, and it took me an hour to do it each time. That is not a good process. Do I need to educate users? Do I need to put together a training guide? Do I need to make a link more prominent? What is it that I can do to start saving myself time—and in the end, saving the organization time?'"

The second rationale for tracking time spent on requests is related to ACT's research reports. Says Ms. Bouwers, "We put out 10 to 12 of them a year, along with information papers and policy papers and so forth, and make them available on the organization's website. I write to the authors and say, 'Did you use the library to help with this report?' Most of the time I know the answer is yes. I then ask them 'How much time do you think I saved you?' Mary Ellen Bates has a statistic I heard that one hour of a librarian's time equals roughly nine hours of a researcher's time. I haven't seen the number be quite that high, but even if it took me 15 minutes to run an EBSCO search and send a link to the search and say, 'I think this is roughly what you need,' on average, my users report that would have taken them an hour and a half to two hours. I'm a heck of a lot cheaper than a senior psychometrician, I imagine. Then I can go to my manager and say, 'This took 15 minutes, which is X dollars of my time. If staff member ABC had done this himself, he says it would have taken him two and a half hours, which is approximately this many more dollars, so we've saved Y dollars.' If I'm using request management to track the time I spend on a request, I can go directly to any requester and say, 'How much time do you think that saved you?' and begin to calculate the organization's ROI that way. It is possible to demonstrate there really is value delivered. It does take some time on your part to track it, but you truly can attribute substantial numerical value to library services.'

Ms. Hathway reiterated that beyond its benefits to the organization, a request management system provides benefits for the department and for individuals, including for managerial activities such as strategic planning.

Per Alaina Kolosh, "If I get a number of requests on a certain topic, that gets my attention, so for example, I tell the people who put together our magazine, 'You should do an article on this, or maybe we want to put together a member webinar or something like that.' You kind of end up being the matchmaker in your organization—because you're listening and tracking requests all day. You know what people are asking for, and you help connect the interested parties." She pointed out that these insights help her to know which topical areas she should invest in by purchasing new materials.

Ms. Hathway asked the panelists about 'upcycling' and 'recycling', and how a request management system supports that.

Samantha Bouwers absolutely sees value in mining the request data, saying "If someone comes to me and says, 'How much money did that company make last year?' maybe I can recall that I did a Lexis search on that, for example. Sure, I could just run the Lexis search again, but instead I can go right back in to the database to look it up. I can see exactly who I did it for last time and the answer I gave them, and I can connect the current requester with that person—and maybe I can simply update the data rather than reinventing the wheel."

Alaina Kolosh mentioned that she is excited about her migration to Lucidea's GeniePlus especially because of its Request Management Module. Like many other solo librarians, Ms. Kolosh historically tracked things in spreadsheets, in email, and in other places. "When you want to reuse something like that, you have to go back and find it. Also, I'm sure it happens to others in the room: sometimes when you're done with a request, three weeks later you think of something that would be perfect for that project, and you want to send it along to the requester. With a great request management system, it's just easier to find 'that thing' and it's the sort of service that people remember. They'll put it down on their member satisfaction survey—or they'll tell your organization's new President!" The lesson here is that a request management system makes it a lot easier to be proactive.

A robust request management system provides business intelligence that supports operational decisions, benefiting the library or knowledge center from a workflow perspective. Says Andrea Bruce, "In terms of tracking requests, one of the things we can see is who's been handling the lion's share of the work, and take steps to correct that. We were struggling with that not too long ago. We have a departmental email address that people can use to send us quick messages like, 'I need research on this particular topic', 'I need this book', or 'I need this technical paper.' There would be days when most of us would be working on our individual projects (or even some request from previous days we were continuing to work on). We were trying to assess how can we better manage things so the daily load isn't falling disproportionately to one person or just a few team members. One of the things we absolutely do not want to do is overburden one person and make them feel like they're shouldering the majority of things and going it alone. By tracking the requests, it's easy for us to look at things and say, 'This particular person has been taking the brunt of things. Let's try to distribute things more evenly.'

Another wrinkle to this is that we rely on each other's expertise or knowledge of specific resources; if we know who has worked on what, we can connect with each other and say, 'I've got this request. I've hit a wall. What can I do? Can you help me? Can you point me in another direction?' I think the request management system helps ensure we're not all just siloed off and that we're working effectively as a team."

How, why, and for whom should you collect and measure data related to reference requests and research?

Emma Hathway set the stage for the next topic area by remarking on the need to think about who you're targeting with your request management reporting, and then working backwards as to what you want to track. As with any kind of communication, you must know your audience and their needs.

Says Samantha Bouwers, "Absolutely. You can say, 'I answered 100 reference requests for 29 departments last month', but that doesn't really mean a lot unless you contextualize it. Is that a good thing? Is that a bad thing? Most important, what did answering those requests actually do for the organization? Where was the impact? Regarding how, why, and for whom we're collecting and measuring data, I think that's changeable. Can you raise your hand if your library has been moved to a new department in the last 18 months to two years? There's a handful of hands in the air, and during my first four years at ACT the library was in four different departments. Now, we've been in the same one for the last two and I'm starting to think maybe we're getting too comfortable. But when we reported to Marketing, if I handed those guys a spreadsheet, it was instant snooze fest. They would not pay attention at all. So, we made infographics and lots of pretty pictures, and got really familiar with these beautiful data-sharing techniques. I handed my current boss, who's a data scientist, an infographic—and he said, 'Can I have a spreadsheet?' I said, 'Oh, gosh! Yeah, of course.' This is an example of how important it is to know your audience. Regarding for whom, I'd say anyone who will listen! We put together an annual report and push it out to the whole organization and say, 'This is what we did for you this year.' Numbers mean something, but not unless you put them in context—and you want to contextualize them in a way that's going to set you up for success, whether that is to say, 'Listen, we handled 50% fewer requests this year, but we also have 50% fewer librarians,' or whatever the case might be. You tell a story and help the organization understand what it is that you do and why and how."

Alaina Kolosh also produces an annual report, and recognizes the importance of tweaking things to suit the audience. "For example, our Membership department wants to know how many member requests came in. We also track that using NSC's customer relationship management system so they can see who the members were, and what they asked, and how many requests they had—so when they're trying to get people to renew they can say, ″Your organization used our library and this is one of the major benefits of your membership.″

Further, Ms. Kolosh says she is "...fortunate that I don't have to be too concerned about demonstrating cost-benefit. It really is all about the impact of our work, and high touch, and the relationship with the customers."

Within Hatch, per Andrea Bruce, "We try to be as engaged as we possibly can with every business sector within Hatch—sure, all the fields within Engineering, but also the non-engineering departments, including Marketing, Accounting, HR. We have a Corporate Learning Center that we work with fairly frequently. We want to be able to serve as many people as we can and not pigeonhole ourselves. We don't say 'We've been getting a lot of requests from the metals group for the past while; we're just going to focus all our energy on them', because that's not to our benefit; it's going to pigeonhole us. It's going to make us look unapproachable, and we want people to come and talk to us. We want to see people. We want to combat library stereotypes, and we want to be as open, friendly, and engaging as we can be, so people will feel comfortable coming back to us. We also want to teach them how to use the resources we have for them—because we're not buying all these subscriptions and connecting with databases for ourselves!"

Samantha Bouwers spoke about the value of dynamic reporting. "I'm looking at how we can make things a little more dynamic for management, putting together something that automatically updates every day and is integrated with our email system. I can envision a scenario where if my boss has a question from his boss or someone else in management about what the library is up to, he can go to my dashboard and say 'Oh, the library answered 80 questions this week, and 45 percent of them were difficulty level 4 or higher'. We're trying to get into a cadence of doing things a little more dynamically and offering real-time data."

At Hatch, rather than tracking difficulty level, Ms. Bruce explained that they classify and track by request type. For example, "… whether it's a knowledge management question, or a request for a book, a request that requires a subject matter specialist, or if it's in-depth research that someone needs help with. We classify requests by type, how we received them, and how we responded to it—so we can know what channels people are using to communicate with us, and which types of requests we are getting most frequently. That way we know where we can best direct our energies. If we're getting a lot of requests for book purchases, maybe we need to explore subscriptions we can get for them, or use interlibrary loans more often. As I was saying, then we're not pigeonholing ourselves into one particular area, and we're not focusing all of our attention on 15-minute requests versus hour-long requests, or technical paper requests, versus the harder company research. "

Additional Observations

All our panelists agreed that it's very important to synthesize and share qualitative information about library products and services in addition to the quantitative data captured in request management systems. Samantha Bouwers keeps a "Brownie Points File" with emails of thanks and other positive feedback that she routinely shares with her management. Says Ms. Bouwers, "…mixing quantitative and qualitative measurements to truly prove value is very powerful. It's not just about checking out 90 books this month; it's about how we helped, it's about our impact. 'Because you acquired this book for me, I could do/deliver/answer/respond to XYZ.' That's really what we're trying to get to."

There was also agreement that relying on other people within your organization to help you tell the story of the library's impact is a good strategy. If you have graphic designers who can produce charts for you, leverage them. If you're doing a survey to capture qualitative information, perhaps the Marketing team can help you write the questions. This outreach asking for help and getting it is especially helpful if you are a solo.

Attendee Q&A

It's a challenge to complete a request intake form as an information provider; it can be even more challenging to get the requesters to complete it. The first question from the audience was about ways to make it easier and faster, while getting the information needed not only to respond, but gather statistics.

All the panelists agreed on the need to keep it simple, with as few fields as possible, dropdown lists, templates, and email integration—which is a huge time saver. The bottom line is, some of the fields are mandatory, and you have to make that a condition of being able to save/send the request. But if the rest of the form is easy, it will be used. Samantha Bouwers suggested that for capturing impact information, if you want to document the library's benefit to the organization, you could have a dropdown list of company goals instead of asking users to type in their response. That leads to standardized output when it comes time to generate reports, so it's a win-win.

One audience member asked about strategies for when your request management results don't necessarily tell the story you want them to. "For example, last year when we did our statistics, we had a 40% drop in what we call in-depth requests, so that would be like Level 5/ Level 6 at ACT. Some of that was within our control—at that time we didn't do as much outreach as usual and the result was fewer requests. Other drivers were totally beyond our control, e.g., lack of funding for research programs, which meant the researchers didn't have anything to do, so they had no questions for us. We pointed that out, but to management it sounded like, 'Well, it's kind of like you're making excuses.' We're trying to figure out how to be strategic about explaining when statistics aren't in our favor, while not complaining or making excuses."

Per Alaina Kolosh, "I've had that experience and I try to just demonstrate 'This part was down, but this part was up'. E.g., yes, requests are down, but acquisitions are up. We're a membership organization. If our membership goes down, the member requests go down. That's just the way it works. You can tie it back to that just as a matter of plain math, but then say, "This is what I'm going to try. I'm going to participate in the next new member webinar to tell them about the library." Just try to have an explanation—not an excuse, an explanation—and then offer ideas about what you plan to do."

In the same context, Samantha Bouwers also loves the idea of an action plan. "You don't have to try and hide the facts, but do put it in terms of a pilot program, for example. 'I want to pilot this kind of training for the next three months, and see if over the next three months our 2020 numbers are better than our 2019 numbers.' But unless you have the numbers, you can't do that. I also like the idea of saying, 'Requests were down, but the database usage was up.' Maybe more people are self-service because of what you've provided. That's where you couple metrics coming from multiple channels ...'I've taught more people how to fish. Now, look, they're fishing!'.

All the panelists agreed on the importance of double checking your numbers, especially if you reach a conclusion that is surprising. If your usage is down by 120% year on year, you might find you crunched 13 months of numbers the last time you ran the report, but this time you accidentally only crunched 11. It's critical to document your process so you can reverse engineer the assumptions and ensure accuracy.

Per Andrea Bruce, "I try to look into the mitigating factors; there are some months for my library where requests are simply a little bit low for that month because we depend on the projects the engineers are working on. There are going to be times of the year when Hatch isn't working in a particular field as much, or it could just be the way the market is—the company isn't getting as many projects as we would like. Sometimes that can impact our request load. It's not really saying, 'Hey, it's not us'; it's just looking at the situation and seeing it for what it is. But it's always good to look at what you're doing as a librarian, team, and organization. 'Are there gaps that we're not plugging here?' But sometimes you just have to put on a brave face and say, 'This month/week people didn't request our help as much.' "

A way to present the reality of that came from Samantha Bouwers, who commented on ACT's PTO scheme which often results in staff taking most of December up as a way to use, not lose, their days off. "Our statistics in December are always pretty dismal. We're not going to say 'Our requests were down by 40%.' We're going to say 'Our statistics are on target for December.' And we're going to say, 'November is always busy, and look—we were really busy!'

One attendee who works in a nonprofit with a library that serves the member organizations, but also the public and a number of academics, asked about prioritizing requests, maybe even in an automated way. All the panelists agreed that there isn't really a tech-based way to triage requests. Sometimes prioritization is based on who's asking: if it's a board member, you're going to respond to them first. And sometimes if you are about to get started on a large, all-consuming research project, you may tackle a few less complex, fast turnaround requests so that you don't leave those requesters hanging. You may get a call from someone who's in the middle of a presentation or at a conference, and they need an answer right now. Everyone agreed that they use their judgement more than anything else.

Samantha Bouwers does use a view of her request tracking dashboard with 'do, doing, done' columns to get a quick visual of the state of play, and said it's not super high-tech, but as Andrea Bruce remarked "It doesn't have to be high tech to work; it can be as low tech as you need it to be." Sticky notes on a whiteboard can provide a similar visual!

Conclusion

A sophisticated request management system and associated workflows enable much more than just statistics and reporting. Librarians can mine that data to expose knowledge and training gaps, to develop marketing strategies, to reallocate resources (both staff and content budget) and to deliver both quantitative and qualitative evidence of impact and value.

Armed with the data, special librarians can transform the ways they deliver products and services, continually integrate and align with organizational imperatives and initiatives, and measure the department's impact on the bottom line, whether that's member satisfaction, increased revenue, or thought leadership. To interpret what you learn, to tell a story with the numbers, and to begin a dialogue that engages people, you have to be part marketer, part data scientist, part detective, and part Excel Wizard.

> *"A librarian's career, what we do, is continually changing. A lot of people still think of libraries in the same way they did when they left school. They're stuck; we aren't. They don't realize all the areas that we touch. It's not just about finding and purchasing things, it's processing information, summarizing it, and synthesizing it—and giving you something you can actually use, as opposed to a stack of articles or studies. Leveraging a powerful request management system enables us to demonstrate our value and our impact."* – ***Andrea Bruce, Hatch***

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