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*All the Information You Need!
Using Your Library's Annual Report
to Market Library Services*

Academic Library Association of Ohio
2012 Annual Conference – Wilmington, Ohio
Corey Seeman
Kresge Business Administration Library
tinyurl.com/CSeeman

Overview

- On Sales and Numbers
- About Kresge Library
- Telling the Story of Kresge Library
- Creating the Annual Report
- Using the Annual Report

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On Sales and Numbers

- Father was a real innovator in discount merchandising in New Jersey (Marketplace Mall and Clothes Closet).
- Never wanted to be in sales as a career.
- Worked for JC Penney in the management program for 3 weeks and 1 day.
- Yet as a library director, I am in sales EVERYDAY!

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On Sales and Numbers

- **Be careful about Metrics & Dashboard indicators**
- Groupon #s
 - ~ Discounts on "list price"
 - ~ Not available on sale merchandise
 - ~ Discount on first part of purchase
 - ~ **A 50% discount promised can result into a real discount of 26%**
- See also pricing at Kohl's....
- See more ranting here:
http://mblog.lib.umich.edu/~cseeman/archives/2012/04/groupon_math_or.html


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On Sales and Numbers

- Drowning by Numbers: The State of Baseball History (*Western Pennsylvania History*, Volume 76, Number 2 (Summer 1993) , 76—78)
- See:
<http://dpubs.libraries.psu.edu/DPubS?service=UI&version=1.0&verb=Display&page=record&handle=psu.wph/1206481014>
- Assessment of the role and over-importance of numbers in baseball history.
- So about those numbers....
- What do they mean, anyway?

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On Sales and Numbers

- If you have X transactions – is that good?
- 2012 MLB Statistics
 - ~ 1.000 Top Stolen Base % - Quintin Berry (Detroit Tigers)
 - ~ .842 Top Winning % (pitcher) – Kyle Lohse (Cardinals)
 - ~ .608 Top Slugging % - Giancarlo Stanton (Miami Marlins)
 - ~ .605 Top Winning % (team) – Washington Nationals
 - ~ .474 Top On-base % - Joey Votto (Cincinnati Reds)
 - ~ .336 Top Batting % – Buster Posey (SF Giants)

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On Sales and Numbers

- Sometimes it does not matter what your dashboard shows



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About Kresge Library

- Kresge Library: Independent Library at University of Michigan - Ross School of Business (3700 FTE)
- We primarily serve the Ross School of Business (though we work with other departments and students/faculty at Michigan)
- Staff of 21 FT people (8 librarians, 13 staff) with 4.5 FTE of temporary staff
- Open 108 service hours a week
- <http://tinyurl.com/KresgeLibrary>

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About Kresge Library

- Historically, we have reported to different positions at the Ross School of Business.
- Typically, we have reported to rotating Associate Dean.
- From 2006-2007 and 2010-present, we reported to the Chief Administrative Officer.
- Different administrators have had different information they wanted.
- One Associate Dean was a "numbers" person and it forced Kresge to count everything.
- Over the last six years (2006+), we have seen a real "hands off" approach from the Dean's Office.

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About Kresge Library

- I was hired as Associate Director in November 2005.
 - ~ My professional experience was in special and academic libraries.
 - ~ None of these libraries had an annual report.
- Director left in April 2006.
- Interim Director from May-October 2006
- Director from October 2006-present

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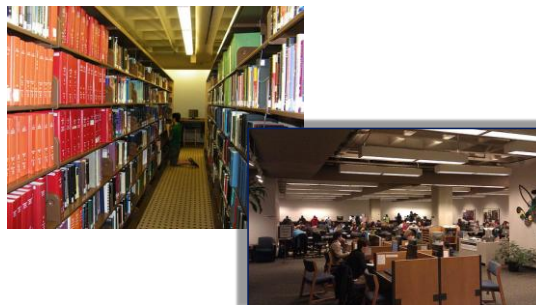
Telling the Story of Kresge

- As a new director, I wanted to be able to showcase what we are doing and share that information with the school.
- Librarians are modest (often) and trust that people know the intrinsic value of our work.
- We needed a way to provide the school with the scope of our work.
- We needed a way to demonstrate ROI (Return on Investment).

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Telling the Story of Kresge



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Telling the Story of Kresge

- But many people at our school did not understand the library as a whole.
- Instead, they only knew the part of the library that they interact with.
- Traditional library metrics might not resonate with the Ross Community.
- We had no immediate history of an annual report at Kresge, but it seemed like a good idea!

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Telling the Story of Kresge

- We had already been compiling information for an annual report at Kresge – but for professional audiences.
- No one at Ross saw all of these documents – so we had the data – we just needed to share it.
- Goal was to take this data and make it into a readable and understandable document for the library community.

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Telling the Story of Kresge

- **Annual report of activities to ABLD**
 - ~ Prose reports that are shared with the top 50 business libraries in North America
 - ~ Sections include:
 - New and ongoing initiatives
 - Organizational changes and new staff
 - Physical space
 - Collection and vendor issues
 - Business school & organizational issues
 - Other news

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Telling the Story of Kresge

- **Management Review and Analysis Narrative (our annual budget request cover letter)**
- Recounting our accomplishments during the previous year & Serves as the basis for our budget request to the school.
 - ~ The highlights and major accomplishments of our FY 2012 operations
 - ~ Please provide any comments or suggestions regarding how the school can maintain service levels in a period of constrained resources
 - ~ New programs and initiatives planned

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Telling the Story of Kresge

- **Annual participation in ARL stats from main library**
- Numbers, numbers, and more numbers....
 - ~ Collection size
 - ~ Expenditures
 - ~ Personnel #s and Costs
 - ~ Instruction Sessions
 - ~ Reference Transactions
 - ~ Circulation Counts
 - ~ Resource Usage Counts
 - ~ ILL Transactions

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Telling the Story of Kresge

- In creating our annual report, we want to:
 - ~ Present the information for the Ross audience (removing library jargon)
 - ~ Present an overview of what we are doing at Kresge (good and not so good)
 - ~ Focus on activities, not for fundraising
 - ~ Share the spotlight with our entire staff at the library

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Telling the Story of Kresge

- This report supports our marketing efforts to:
 - ~ Demonstrate what we do at Kresge
 - ~ Showcase what we can accomplish
 - ~ Highlight the difference that we have been able to make in the work of faculty and students

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Telling the Story of Kresge

- Outputs vs. Outcomes
- We record our work in outputs (circulation, downloading, transactions, etc.)
- We build our value in outcomes (how people use our resources in classes, clubs, and their career search).
- Both elements need to be represented.

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Creating the Annual Report

- Driving Forces for the Kresge annual report
 - ~ Has to be a low cost endeavor
 - *Not printed and little design work*
 - ~ Has to be web based
 - *This eliminates printing costs*
 - ~ Has to be easy to find for older reports
 - *This is very useful for people looking at the library.*

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Creating the Annual Report

- We did not want this...



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Creating the Annual Report

- Given that we were doing this independently, we were not bound by any rules or conventions.
- We expanded the document over to years to include photos, different statistics, and screenshots.
- In 2011 & 2012, also included selected responses from the MBA and BBA exit survey.

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Creating the Annual Report (2011)

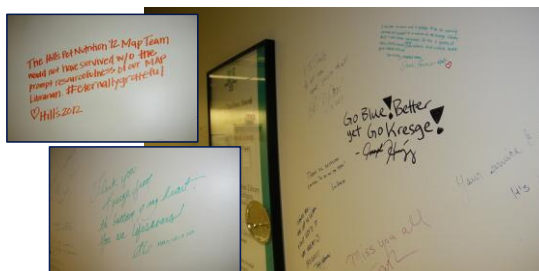
- **Exit Survey Responses from MBA Grads**
 - ~ "Another gem at Ross. Whenever I have asked Kresge for help (in person or remotely through Meebo), I have never been disappointed. They helped me greatly during my internship.
 - ~ "Best thing about Ross hands down."
 - ~ "The librarians are amazingly responsive and supportive. I will miss them and their resources."
 - ~ "Kresge Library staff is awesome! They answer to the e-mails promptly even during the weekend and they are very helpful. The chat is also very useful."
 - ~ "Kresge library staff rocks! One of the best things about Ross."

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Creating the Annual Report

We include graphically rich material to showcase impact



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Creating the Annual Report

- Primary Sections (2012)
 - ~ Library Initiatives & Operations*
 - ~ Collections News*
 - ~ Matching with the Ross Strategic Plan**
 - ~ Kresge Library by the Numbers (last 6 years)
 - ~ Library Staff News
 - ~ Presentations and Articles
 - ~ Staff Listing

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Creating the Annual Report

- Web format allows us to be flexible
 - ~ 2007: 6 pages (September 2007)
 - ~ 2008: 7 pages (November 2008)
 - ~ 2009: 9 pages (December 2009)
 - ~ 2010: 8 pages (January 2011)
 - ~ 2011: 10 pages (October 2011)
 - ~ 2012: 12 pages (Expected January 2013*)
- The document is as long as it needs to be and released when it is ready.

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Creating the Annual Report

- Many annual reports are focused on finances.
- While we do not provide budget figures currently, we might in the future. – will add this
- We do provide overall fiscal situation (budget increases and decreases).
- We are candid about what we are doing with these changes in fortune.

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Using the Annual Report

- The Kresge Library Annual Report is focused on our **activities and accomplishments**.
- We use it for outreach to share our accomplishments with the school as a whole.
- Goal is to provide the school with a ROI statement on their investment in the library.
- Recently shared with architects working with Ross to understand space needs.
- It serves as a calling card for who we aspire to be.

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Using the Annual Report

- When it is released, we:
 - ~ Email to all faculty, staff and students (link only)
 - ~ Add it to the Kresge News Blog
 - ~ Add it to the Kresge Wiki page (<http://tinyurl.com/KresgeLibrary>)
- We often get responses from faculty and staff right away.

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Using the Annual Report

- Student Question about Action-based Learning:

I am interested in finding out more about these resources- what interested me was your statement about the support of action-based learning programs. In what way does Kresge do this? I am curious because I am involved in a student consulting group (which is based on action-based learning) and hope to become as equipped to handle consulting projects as possible. Do you have an idea as to which resources would be most useful for this type of work?

- BBA Sophomore, October 2011
- Connection about opportunity to work with student club

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Using the Annual Report

- Additionally, the annual report may be used for:
 - ~ Faculty recruiting at Ross
 - ~ Staff and supervisor recruiting at Michigan's School of Information
 - ~ Connecting with the school
- A great way to introduce people to the library (including a new dean)
- *The reports have two key readers: my current boss and my next boss*

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Using the Annual Report

- Traditionally have felt that our best outreach and marketing is through good acts & word of mouth
- Held this view at the Historical Society of Western Pennsylvania and the National Baseball Hall of Fame.
- The annual report can showcase what we accomplished and provide ideas of what we might be able to do in the future.

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Using the Annual Report

- Connecting to the Ross School
 - ~ Showcasing presentation and writing (for a non-tenure shop – this is a pleasant surprise)
 - ~ Recognizing the staff at Kresge
 - ~ Showing what we have accomplished
 - ~ Showing non-library activities at Kresge (whale shirt and food drive)
 - ~ Providing a means to encourage our community to reach out to allow us to help with their needs

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Using the Annual Report

- Connecting to values of a branch library
 - ~ Proximity (location)
 - ~ Flexibility (and responsive)
 - ~ Quality of Service (specialization)
 - ~ Learning & Retention (working within the community)
- From Howes & Zimmerman, The case for preserving academic branch libraries, College & Research Libraries News vol. 72 no. 9 542-543 (2011)

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Using the Annual Report

- Connecting to tenants of the **Ross Strategic Plan**.
- Being released in December 2012 or January 2013.
- We can show what we are already doing to support these initiatives and strategic goals.
- Will be structured to match the language of the Ross School's plan.

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Using the Annual Report

- **Ross Strategic Plan** will identify core values & outline strategic goals.
- We can show how we already work to support these values and reach these goals.
- Need to delay report until plan is released.

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Future of our Annual Report

- We will continue to present this report annually.
- Focus will remain on the activities of the library rather than fundraising.
- Will continue to be web based.
- It will expand and contract as needed.
- Changing attention to outcomes vs. outputs.

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Additional Reading – Annual Reports

- Breton, Gaétan. 2009. From folk-tales to shareholder-tales: Semiotics analysis of the annual report. *Society and Business Review* 4 (3): 187-201.
- Brown, David. 2003. Annual reports: A powerful public relations tool. *Mississippi Libraries* 67 (2) (Summer 2003): 46-7.
- Christensen, A. L., and R. M. Mohr. 2003. Not-for-Profit annual reports: What do museum managers communicate? *Financial Accountability & Management* 19 (2): 139-58.
- Emily Morton-Owens, and Karen L. Hanson. 2012. Trends at a glance: A management dashboard of library statistics. *Information Technology and Libraries (Online)* 31 (3) (Sep 2012): 36-51.

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- Hildebrandt, H. W., and R. D. Snyder. 1981. The pollyanna hypothesis in business writing: Initial results, suggestions for research. *Journal of Business Communication* 18 (1): 5-15.
- Howes, B., and M. Zimmerman. 2011. The case for preserving academic branch libraries fostering campus communities. *College & Research Libraries News* 72 (9): 542-3.
- McKenzie, Brian. 2011. Study of oral narrative provides preliminary evidence of entrepreneurs' use of story telling. *Journal of Management Policy and Practice* 12 (2) (Apr 2011): 134-41.

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- McLellan, Hilary. 2006. Corporate storytelling perspectives. *The Journal for Quality and Participation* 29 (1) (Spring 2006): 17,20,43.
- O'Gorman, Kevin D., and Caillein Gillespie. 2010. The mythological power of hospitality leaders? *International Journal of Contemporary Hospitality Management* 22 (5): 659-80.
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Thank You

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cseeman@umich.edu

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