

## *Using Your Library's Annual Report to Market Library Services*

Charleston Conference 2011

Corey Seeman

*Kresge Business Administration Library*

### Overview

- About Kresge Library
- Telling the Story of Kresge Library
- Creating the Annual Report
- Using the Annual Report

## Being in Sales

- 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!

Using Your Library's Annual Report to Market Library Services  
Corey Seeman – Charleston Conference 2011

MICHIGAN   
ROSS SCHOOL OF BUSINESS

## 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 20 FT people (8 librarians, 12 staff) with 4.5 FTE of temporary staff
- Open 108 service hours a week
- <http://tinyurl.com/KresgeLibrary>

Using Your Library's Annual Report to Market Library Services  
Corey Seeman – Charleston Conference 2011

MICHIGAN   
ROSS SCHOOL OF BUSINESS

## 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 caused Kresge to count everything.

Using Your Library's Annual Report to Market Library Services  
Corey Seeman – Charleston Conference 2011

MICHIGAN   
ROSS SCHOOL OF BUSINESS

## About Kresge Library

- I was hired as Associate Director in November 2005.
- Director left in April 2006.
- Interim Director from May-October 2006
- Director from October 2006-present

Using Your Library's Annual Report to Market Library Services  
Corey Seeman – Charleston Conference 2011

MICHIGAN   
ROSS SCHOOL OF BUSINESS

## 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.

Using Your Library's Annual Report to Market Library Services  
Corey Seeman – Charleston Conference 2011

MICHIGAN   
ROSS SCHOOL OF BUSINESS

## Telling the Story of Kresge

- But most people do not understand the library as a whole.
- Only know the part of the library that they interact with.
- We had no immediate history of an annual report at Kresge, but it seemed like a good idea!

Using Your Library's Annual Report to Market Library Services  
Corey Seeman – Charleston Conference 2011

MICHIGAN   
ROSS SCHOOL OF BUSINESS

## Telling the Story of Kresge

- We have already been compiling information for an annual report:
  - ~ Annual report of activities to ABLD
  - ~ Annual budget request cover letter
  - ~ Annual participation in ARL stats from main library
- As I finished my first year at Kresge, we moved forward with our annual report.

Using Your Library's Annual Report to Market Library Services  
Corey Seeman – Charleston Conference 2011

MICHIGAN   
ROSS SCHOOL OF BUSINESS

## 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
- Annual budget request cover letter
  - ~ Recounting our accomplishments and the basis for our budget request.
- Annual participation in ARL stats from main library
  - ~ Numbers, numbers, and more numbers

Using Your Library's Annual Report to Market Library Services  
Corey Seeman – Charleston Conference 2011

MICHIGAN   
ROSS SCHOOL OF BUSINESS

## Telling the Story of Kresge

- In creating this report, we wanted 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

Using Your Library's Annual Report to Market Library Services  
Corey Seeman – Charleston Conference 2011

MICHIGAN   
ROSS SCHOOL OF BUSINESS

## 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.

Using Your Library's Annual Report to Market Library Services  
Corey Seeman – Charleston Conference 2011

MICHIGAN   
ROSS SCHOOL OF BUSINESS

## Creating the Annual Report

- Driving Forces is hosting an 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 (including new administrative officers)

Using Your Library's Annual Report to Market Library Services  
Corey Seeman – Charleston Conference 2011

MICHIGAN   
ROSS SCHOOL OF BUSINESS

## 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, included selected responses from the MBA and BBA exit survey.

Using Your Library's Annual Report to Market Library Services  
Corey Seeman – Charleston Conference 2011

MICHIGAN   
ROSS SCHOOL OF BUSINESS

## Creating the Annual Report

- Primary Sections (2011)
  - ~ Library Initiatives & Operations\*
  - ~ Collections News\*
  - ~ Kresge Library by the Numbers (last 5 years)
  - ~ Library Staff News
  - ~ Presentations and Articles
  - ~ Staff Listing

Using Your Library's Annual Report to Market Library Services  
Corey Seeman – Charleston Conference 2011

MICHIGAN   
ROSS SCHOOL OF BUSINESS

## 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)
- The document is as long as it needs to be and released when it is ready.

Using Your Library's Annual Report to Market Library Services  
Corey Seeman – Charleston Conference 2011

MICHIGAN   
ROSS SCHOOL OF BUSINESS



## Creating the Annual Report

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

Using Your Library's Annual Report to Market Library Services  
Corey Seeman – Charleston Conference 2011

MICHIGAN   
ROSS SCHOOL OF BUSINESS

## 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.

Using Your Library's Annual Report to Market Library Services  
Corey Seeman – Charleston Conference 2011

MICHIGAN   
ROSS SCHOOL OF BUSINESS

## 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.

Using Your Library's Annual Report to Market Library Services  
Corey Seeman – Charleston Conference 2011

MICHIGAN   
ROSS SCHOOL OF BUSINESS

## 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*

Using Your Library's Annual Report to Market Library Services  
Corey Seeman – Charleston Conference 2011

MICHIGAN   
ROSS SCHOOL OF BUSINESS

## Using the Annual Report

- Additionally, it is used for:
  - ~ Faculty recruiting at Ross
  - ~ Staff and supervisor recruiting at Kresge Library
  - ~ 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

Using Your Library's Annual Report to Market Library Services  
Corey Seeman – Charleston Conference 2011

MICHIGAN   
ROSS SCHOOL OF BUSINESS

## Using the Annual Report

- Connecting to the Ross School
  - ~ Showcasing presentation and writing (for a non-tenure shop – this is a 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

Using Your Library's Annual Report to Market Library Services  
Corey Seeman – Charleston Conference 2011

MICHIGAN   
ROSS SCHOOL OF BUSINESS

## 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)

Using Your Library's Annual Report to Market Library Services  
Corey Seeman – Charleston Conference 2011

MICHIGAN   
ROSS SCHOOL OF BUSINESS

## Future of the 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.

Using Your Library's Annual Report to Market Library Services  
Corey Seeman – Charleston Conference 2011

MICHIGAN   
ROSS SCHOOL OF BUSINESS

## Additional Reading – Annual Reports

- Grey Literature Past and Present – the Evolution of Library Annual Reports (Susan E. Searing, University of Illinois, 2011)
- Gordon, T. P., Khumawala, S. B., Kraut, M. and Neely, D. G. (2010), Five dimensions of effectiveness for nonprofit annual reports. *Nonprofit Management and Leadership*, 21: 209–228.
- Christensen, A. L., and Mohr, R. M. “Not-for-Profit Annual Reports: What Do Museum Managers Communicate?” *Financial Accountability and Management*, 2003, 19(2), 139–158.

Using Your Library's Annual Report to Market Library Services  
Corey Seeman – Charleston Conference 2011

MICHIGAN   
ROSS SCHOOL OF BUSINESS

## Thank You

Questions?  
Corey Seeman  
[cseeman@umich.edu](mailto:cseeman@umich.edu)

Using Your Library's Annual Report to Market Library Services  
Corey Seeman – Charleston Conference 2011

MICHIGAN   
ROSS SCHOOL OF BUSINESS