

RESOURCES FOR RESULTS

Tools for Allocating Resources

November, 2006

RESOURCES FOR RESULTS

Results Books that Are Currently Available

Rubin, Rhea. *Demonstrating Results: Using Outcome Measures in Public Libraries*. (Chicago: American Library Association, 2006).

Mayo, Diane. *Technology for Results: Developing Service-Based Plans*. (Chicago: American Library Association, 2005).

Nelson, Sandra and June Garcia. *Creating Policies for Results: From Chaos to Clarity*. (Chicago: American Library Association, 2003).

Mayo, Diane and Jeanne Goodrich. *Staffing for Results: A Guide to Working Smarter*. (Chicago: American Library Association, 2002).

Nelson, Sandra. *The New Planning for Results: A Streamlined Approach*. (Chicago: American Library Association, 2001).

Nelson, Sandra, Ellen Altman, and Diane Mayo. *Managing for Results: Effective Resource Allocation for Public Libraries*. (Chicago: American Library Association, 2000).

Forthcoming Titles in the Results Series

Bryan, Cheryl. *Managing Facilities for Results: Library Space that Supports Services Now* [working title]. (Chicago: American Library Association, 2007).

Goodrich, Jeanne and Paula Singer. *HR for Results: The Right Person for the Right Job*. (Chicago: American Library Association, 2007).

Nelson, Sandra. *Implementing for Results: From Idea to Action* [working title]. (Chicago: American Library Association, 2007).

STAFF RESOURCES

ISSUES TO CONSIDER WHEN MAKING STAFFING DECISIONS

What activities should be performed and when and where should they be performed?

What abilities are needed to accomplish the selected activities?

How many staff are needed in relation to patron use and staff workloads?

How are staff members currently using their time?

Where can the staff time to accomplish the library's priorities be found?

MANAGING FOR RESULTS STAFFING WORKFORMS SUMMARY

WORKFORM	TITLE	PURPOSE
OVERVIEW		
<i>Workform S1</i>	Staff Functions Related to Service Priorities	To determine the staff functions that will be affected by the library's service priorities
ACTIVITIES AND ABILITIES		
<i>Workform S2</i>	Activities Involved in a Service Priority	To determine the characteristics of the specific activities necessary to provide one service priority
<i>Workform S3</i>	Staff Abilities Required for an Activity	To pinpoint the specific staff abilities needed for one activity related to a service priority
<i>Workform S4</i>	Checklist of Abilities for Activities	To clarify when, where, and how abilities for a service priority are to be utilized
<i>Workform S5</i>	Analyzing Training Needs and Costs for a Service Priority	To help assess the real costs of training staff to acquire desired abilities
CAPACITY, UTILIZATION, AND PRODUCTIVITY		
<i>Workform S6</i>	Estimating Hours Available for Full-Time Staff	To calculate the hours of expected work by staff category
<i>Workform S7</i>	Public Service Indicators	To compare activity levels among public service units/teams
<i>Workform S8</i>	Analysis of an Activity	To analyze the sequence of tasks involved in performing an activity
OBSERVATIONS AND TIME		
<i>Workform S9</i>	Daily Direct-Observation Log	To collect data on staff activities by structured observations
<i>Workform S10</i>	Unit/Team/Library Observation Summary	To show the number and variety of activities performed by various staff categories during one day
<i>Workform S11</i>	Staff-Activity Analysis	To illustrate the congruence of how a staff member spends time and the tasks important to the job assignment
<i>Workform S12</i>	Daily Time/Activity Log	To collect information about staff activities during one day
<i>Workform S13</i>	Activity Log Summary	To categorize and summarize activities performed by one employee in one day
<i>Workform S14</i>	Unit/Team/Library Activity Summary	To summarize time spent on many activities
ESTIMATING THE COSTS/VALUE OF ACTIVITIES		
<i>Workform S15</i>	Converting Capacity to Cost	To calculate compensation costs for different time periods
<i>Workform S16</i>	Estimating the Cost/Value of Individual Staff Activities	To analyze time and money spent for individual activities
<i>Workform S17</i>	Estimating the Cost/Value of Unit/Team Activities	To analyze time and money spent for unit activities
<i>Workform S18</i>	Estimating the Cost/Value of a Service	To calculate the anticipated or actual costs of activities related to a particular service priority

Electronic copies of these workforms are available at <http://www.elearnlibraries.com>

STAFFING FOR RESULTS WORKFORMS SUMMARY

WORKFORM	TITLE	PURPOSE
<i>Workform 1</i>	Workload Analysis Project Overview	To organize your workload analysis project
<i>Workform 2</i>	Estimate of Productive Work Hours Available	To calculate the total number of hours available annually for any one category of staff
<i>Workform 3</i>	Determining Who Does What	To collect information about who does what activities and tasks in a work location or unit
<i>Workform 4</i>	Standard Terms in Our Library for Tasks and Steps	To provide staff with a standard set of terms they can use to complete the workload data-gathering workforms
<i>Workform 5</i>	Analysis of Staff Time: Work Unit Estimate of Time Spent on Activities	To estimate the percentage of time your staff members spend on each of their assigned activities
<i>Workform 6</i>	Analysis of Staff Time: Individual Estimate of Time Spent on Activities	To estimate the percentage of time you spend on each of your assigned activities
<i>Workform 7</i>	Recording Staff Tasks: Self-Report Log	To identify the tasks a you perform during a workday through self-reporting
<i>Workform 8</i>	Recording Staff Tasks: Direct Observation Log	To identify the tasks a staff member performs during a workday through observation
<i>Workform 9</i>	Analysis of a Task: <ul style="list-style-type: none"> ▪ Observation ▪ Self Report 	To identify all of the steps involved in performing a task or to standardize the steps in a task
<i>Workform 10</i>	Time Spent on Input-Driven Tasks	To identify the relationship of outputs to the time spent during the performance of the steps of an input-driven task
<i>Workform 11</i>	Time Spent on Demand-Driven Tasks	To identify the average amount of time spend on each step in a demand-driven task
<i>Workform 12</i>	Time Spent on Public Desks	To identify the amount of time spent on tasks at public desks
<i>Workform 13</i>	Workflow Chart	To chart the time required for operations, transportation, approval, and/or storage when completing an activity

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COLLECTION RESOURCES

ISSUES TO CONSIDER WHEN MAKING DECISIONS ABOUT COLLECTIONS

How can the collection requirements for service priorities be determined?

What needs to be done to evaluate the library's current collections?

How should the library address the question of format?

What resources are required to develop collections that support the library service priorities?

MANAGING FOR RESULTS COLLECTION WORKFORMS SUMMARY

WORKFORM	TITLE	PURPOSE
OVERVIEW		
<i>Workform C1</i>	What's Important	To determine the data needed to complete the gap analysis process
SIZE		
<i>Workform C2</i>	Volumes - Print and Media	To record information about the number of volumes in the collections that support a specific activity
<i>Workform C3</i>	Titles - Print and Media	To record information about the number of titles in the collections that support a specific activity
<i>Workform C4</i>	Titles - Electronic	To record information about the number of electronic titles in the collections that support a specific activity
UTILIZATION		
<i>Workform C5</i>	Circulation - Print and Media	To record information about the circulation of print and media items that support a specific activity
<i>Workform C6</i>	In-Library Use - Print and Media	To record information about the in-library use of print and media materials that support a specific activity
<i>Workform C7</i>	In-Library Use - Electronic	To record information about in-library use of electronic resources that support a specific activity
<i>Workform C8</i>	Off-Site Use - Electronic	To record information about the off-site use of electronic resources that support a specific activity
ACCESS		
<i>Workform C9</i>	Document Delivery	To record information about the number of days it takes users to get materials that support specific activities when those materials are not available at the time the user visits the library
<i>Workform C10</i>	Materials Availability	To record information about the success users have in obtaining materials that support a specific activity when they come to the library
<i>Workform C11</i>	Electronic Text Availability	To record information about the level of access provided to electronic resources that support a specific activity
AGE		
<i>Workform C12</i>	Copyright - Print	To record information about the age of the print titles in the collections that support a specific activity
<i>Workform C13</i>	Copyright - Media	To record information about the age of the media titles in the collections that support a specific activity
<i>Workform C14</i>	Periodicals - Print and Microform	To record information about the coverage of the print and microform periodical titles that support a specific activity
<i>Workform C15</i>	Periodicals - Electronic	To record information about the coverage and the timeliness of the electronic periodical titles that support a specific activity
CONDITION		
<i>Workform C16</i>	Worn or Damaged - Print	To record information about the condition of print items in the collections that support a specific activity
<i>Workform C17</i>	Worn or Damaged - Media	To record information about the condition of media items in the collections that support a specific activity

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FACILITY RESOURCES

ISSUES TO CONSIDER WHEN MAKING DECISIONS ABOUT FACILITIES

What is the capacity of the library's facilities to support the library service priorities?

How are the existing facilities being utilized?

What is the condition of the existing facilities?

What effect will technology have on the facilities?

How can the existing facilities be changed to better support service priorities?

MANAGING FOR RESULTS FACILITIES WORKFORMS SUMMARY

WORKFORM	TITLE	PURPOSE
OVERVIEW		
<i>Workform F1</i>	What's Important?	To determine what data is needed to complete the gap analysis process
CAPACITY		
<i>Workform F2</i>	Materials Storage	To assess the storage space available to house materials to support intended activities
<i>Workform F3</i>	Equipment and Furniture	To inventory the equipment and furniture the library has to support intended activities and to indicate the condition of the furniture and equipment
<i>Workform F4</i>	Space	To assess the capacity of the spaces in the library that support specific activities
UTILIZATION		
<i>Workform F5</i>	Space	To assess the utilization of spaces in the library that support specific activities
TECHNOLOGY		
<i>Workform F6</i>	Facility Requirement	To assess the impact of technology on the library's facilities used to support an activity

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TECHNOLOGY RESOURCES

Issues to Consider When Making Technology Decisions

How can technology needs be defined based on service priorities?

How can the types of technology a library needs be identified?

What is the current capacity, utilization, and condition of the library's technology?

What technology will be required to meet current and anticipated needs?

How can required capacity be converted to cost estimates?

***MANAGING FOR RESULTS* TECHNOLOGY WORKFORMS SUMMARY**

WORKFORM	TITLE	PURPOSE
NEEDS ESTIMATES		
<i>Workform T1</i>	Equipment, Software, and Dial Capacity	To estimate the technological capacity needed to support a planned activity
<i>Workform T2</i>	Printers	To estimate how many and what types of printers are needed
<i>Workform T3</i>	Summary of Equipment, Printers, Software, and Dial Capacity	To summarize the capacity of technology needed to support a specific activity in each library unit
<i>Workform T4</i>	Leased Lines	To determine the leased line capacity needed to support a specific activity
<i>Workform T5</i>	Summary of Needs Estimates: Leased Lines	To summarize the leased-line capacity needed in each library unit to support a specific activity
CAPACITY		
<i>Workform T6</i>	Workstation and Terminal Functions	To record information on the number of single and multi-function workstations and terminals in each library unit
<i>Workform T7</i>	Workstation and Terminal Condition	To record information on the condition of the workstations and terminals in each library unit
<i>Workform T8</i>	Equipment, Software, and Telecommunications	To record information about the equipment, software, and telecommunications capacity in each library unit
UTILIZATION		
<i>Workform T9</i>	Utilization: Observation	To collect utilization data through observation
<i>Workform T10</i>	Utilization: Public Services Sign Up Analysis	To analyze utilization data obtained from sign-up sheets in library units that allow users to reserve a specific time to use equipment or to sign up on a first-come, first-serve basis
<i>Workform T11</i>	Utilization: Summary	To summarize the utilization data gathered using workforms T9 or T10
COMPARISON OF CAPACITY REQUIRED TO UNUSED CAPACITY		
<i>Workform T12</i>	Comparison of Capacity Required to Unused Capacity Available	To compare the capacity needed with the capacity available in each library unit
ADDITIONAL EQUIPMENT AND LINES NEEDED		
<i>Workform T13</i>	Technology Needed	To determine the number of additional devices to be purchased to reach needed capacity in each library unit
<i>Workform T14</i>	Leased-Line Capacity Needed	To determine the additional leased-line capacity to be acquired to reach needed capacity in each library unit
<i>Workform T15</i>	Costs of Needed Technology	To translate the number and types of devices needed and the dial and leased line telecommunications capacity required into estimated costs

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TECHNOLOGY FOR RESULTS

WORKFORMS SUMMARY

WORKFORM	TITLE	PURPOSE
<i>Workform 1</i>	Audiences and Planning Results	To clarify what the audiences who will review, approve, or use the technology plan need to know
<i>Workform 2</i>	Services Inventory	To develop an inventory of the technology-supported services in your library.
<i>Workform 3</i>	Strategic Plan Links: Sustain, Expand, or Phase Out	To summarize the technology-supported public services in your library and link them to the library's strategic plan. To record the committee's recommendations on the future of the technology-supported public services.
<i>Workform 4</i>	Administrative Tools: Sustain, Expand, or Phase Out	To summarize the technology-supported administrative services in your library. To record the committee's recommendations on the future of the technology-supported administrative services.
<i>Workform 5</i>	New Public Services Support Projects	To evaluate potential new public service support projects
<i>Workform 6</i>	Evaluating Efficiency Projects: Staff Savings	To collect data needed to evaluate potential new efficiency projects
<i>Workform 7</i>	Infrastructure Assessment	To record the baseline of the library's technology and the possible upgrade and enhancement requirements of that technology
<i>Workform 8</i>	Technical Skills Assessment	To gather information on the technical skill level of each staff member of the library
<i>Workform 9</i>	Costs to Sustain Services	To record the estimated costs of investments needed to sustain the library's current technology-based services
<i>Workform 10</i>	Requirements of New or Expanded Services	To record the data gathered on products and services that can be used to expand current technology-based services or introduce new services
<i>Workform 11</i>	Technical Skills Needed	To compare the technical skills that proposed new or expanded projects require with the technical skills available on the library's staff
<i>Workform 12</i>	Project Time Estimates	To record the estimated time that will be required to implement a project.
<i>Workform 13</i>	Summary of Projects	To summarize key information about the projects you are considering
<i>Workform 14</i>	Trigger Point Assumptions	To record the assumptions about available technology or costs that lead the planning committee or project manager to make decisions about specific technologies to use in the future
<i>Workform 15</i>	Technology Suggestion Form	To provide a way for staff to suggest technologies for the library to consider adding to the technology plan
<i>Workform 16</i>	Technical Inventory	To develop an inventory of your current technical infrastructure if your library does not already have an inventory

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