SHALL Training Events 2012 Bristol, 5th October

Calculating and Demonstrating Value of NHS Libraries and Information Services (LIS)

'Measuring the return on NHS Library Services as assets'

Contents – an overview

- This slide pack contains all the material presented at the event in Bristol and all the outputs from the exercises and discussions
- Photographs have been included as a reminder of the event
- Helen Wharam's presentation can be found in slides 7-13
- Your LIS Value Stories can be found in slides 24-31
- Outputs from the 'Sense Check your LIS' exercise can be found in slide 40; slides 41-42 give combined output from previous courses and an example
- Outputs from the Mapping Techniques to Services exercise can be found in slides 54-58; slides 45-49 give information on Balanced Scorecard and ROI
- Outputs from the Café Conversations and Powerful Value Statements exercise can be found in slides 78-82
- Reflections and actions are in slides 91-92
- This slide pack also contains three additional slides developed after the discussions at the Birmingham event – slides 63, 65 and 83

We hope you enjoy reading the slide pack and outputs and that you will find the information of use in helping you and your stakeholders to calculate and demonstrate the value of LIS in your organisation.
With best wishes, Sandra Ward and Ian Wooler.

Our learning objectives

1. To understand why calculating and demonstrating value is so important to Library Services in today's NHS
2. To explore the range of measures and practical approaches available for assessing and expressing value, both financial and non-financial, and to consider which will work in the NHS context
3. To identify ways in which the information gathered via NHS costing techniques and impact toolkits can be used in powerful value statements for key stakeholders
4. To give each participant the opportunity to reflect on their learning and consider actions to take forward with their respective organisations

Our ground rules

❑ Share your experiences and actively listen to others
❑ Everyone's input is equally valued
❑ Be open to new ideas and concepts
❑ Don't dwell on things that did not work in the past – learn from them
❑ Focus on the future you would like to create
❑ Discussions and criticisms must focus on issues, not people
❑ Don't just raise problems – think solutions
❑ Adhere to timings and have fun!

❑ We will use a 'Parking Lot' flipchart to capture and record those aspects of the conversations that are important not to forget, but not directly relevant to our learning objectives

Learning Objective 1

To understand why calculating and demonstrating value is so important to Library Services in today's NHS

Outreach in Estates: sustainability – seizing the opportunity

Helen Wharam, Library Manager

Trust Library, Torbay Hospital,

South Devon Healthcare NHS Foundation Trust

Supporting Torbay Hospital's "green" agenda:

❑Business benefits

❑Challenges for LIS

❑Sustainability project background

Sustainability agenda:

❑What I delivered

❑Business value

❑Return on investment

Contributions to the agenda:

❑How I did it

❑Reflections

The need to calculate and demonstrate value has never been so important

❑ Endless budget discussions

❑ Investment plans scrutiny

❑ Being good at what you do is no longer good enough

  ❑ Easy to describe what you <u>do</u>

  ❑ More difficult to demonstrate the value you <u>add</u>

  ❑ Organisational perception <u>is</u> reality

  ❑ Your services and products are as strong as their weakest link

❑ Very good services are cut because of their inability to demonstrate impact

  ❑ In terms that the organisation can buy

Need powerful value statements for stakeholders!

What is value?

❑ Definitions of value include:

   ❑ The worth, desirability, or utility of a thing, or the qualities on which these depend

   ❑ The amount of money or goods for which a thing can be exchanged in the open market

   ❑ The ability of a thing to serve a purpose of cause and effect

An example of a value chain for an LIS function

We enable…

- Cost–effective selection of quality resources
- Access to the right information for the job from the desk
- Collaboration and knowledge exchange
- In depth information research
- Legal information use

…leading to…

- Better informed staff
- Less time/ effort to carry out tasks
- Reduction in mistakes
- Increased staff capability
- Reduced costs

…and to…

- Higher quality decisions
- Faster problem solving
- Reduction in inefficiency
- Process improvement
- Greater innovation
- Rapid take up of ideas

…resulting in

- Improved organisation performance
- Increased organisation capability
- Risk reduction
- Cost effective processes
- Increased customer satisfaction

An example for an organisational objective targeted at reducing risk

We enable…

- Cost–effective selection of quality resources
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…leading to…

- Better informed staff
- Less time/ effort to carry out tasks
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…resulting in

- Improved organisation performance
- Increased organisation capability
- Risk reduction
- Cost effective processes
- Increased customer satisfaction

The results of the pre-training event survey

The challenges you face when demonstrating value in the NHS and the competencies that enable you to meet the challenges

What are the 3 top challenges you face when demonstrating value (i.e. applying metrics, measuring and reporting value) in your NHS organisation?

Bristol – 5/10/12

What are the 3 top competencies (i.e. skills, experience and knowledge) that enable you to demonstrate value in your NHS organisation?

Bristol – 5/10/12

Exercise 1
'Build' conversations to share LIS value stories

Linking story lines to the 'challenges' and 'competencies' results

Exercise 1 – objective and instructions

❑ The objective of this exercise is to share, capture and use value stories. Stories are a powerful way of sharing experience. Value stories can evidence success, problems or opportunities relating to demonstrating value in NHS.

❑ In groups of 4/5, share value stories and select one to write up on the template provided

❑ Highlights from the stories selected will then be shared with the wider group

An example from York to illustrate:

Name of story:
- iPads – a return on investment

Essence of story:
- 4 iPads acquired for benefit of library and outreach users; can be borrowed for 1 week by hospital staff so they can experiment with their use e.g. on a ward
- Popularity is encouraging non-regular library users to join and learn about other library resources
- Library staff use the iPads on outreach visits, demonstrating facilities available
- As iPads are returned borrowers are sent a survey (too early to analyse) – but feedback is positive – for the wards and home

Challenges and competencies:
- New skills for Library staff – through setting up iPads, learning the technology themselves
- Explaining the technology and its use to users
- Opportunity to add value to library and to broaden user perceptions of what the library can offer
- Raised the profile of the Library especially on outreach visits

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LIS Value stories in action (Bristol – 5/10/12)

Bristol Story 1 – making Call Centre staff more efficient

Essence of story:
- Board had expressed the desire that NHS Direct's Call Centre staff become more efficient
- Repetition of effort to find the information to deal with common enquiries was identified as a factor
- We created **Key Information Packs** – ready made answers on common enquiry topics
- No need to reinvent the wheel for common enquiries

Challenges and competencies:
- Gaining the attention of board level staff
- Showing impact
- Innovation and flexibility
- Ability to explain
- Being innovative in the use of funds, resources, and staff time
- Marketing and promotion skills

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Bristol Story 2 – Value of literature searching

Essence of story:
- Question and Answer service to improve practice
- Service aims for quick turn round time scales
- Value is in saving time; high quality, patient safety
- But we need feedback to demonstrate value

Challenges and competencies:
- Necessity of getting feedback that makes sense to all stakeholders including managers

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http://www.awp.nhs.uk/working-for-us/staff/library-services/

Bristol Story 3 – The 'Muffin Club'

Essence of story:
- Staff doing critical appraisal course wanted post course practice
- Library manager and junior doctor set up a journal club – open to all staff
- Open to all Trust staff
- Club session centres on a structured presentation based on the CASP tool – not essential to have read paper beforehand
- Informal atmosphere - Muffins provided and welcomed
- Fortnightly sessions – 8-8.55am and 17.30-18.30pm
- Used to change practice – with a stimulus and space to consider evidence

Challenges and competencies:
- Getting people through the door – marketing
- Baking !

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http://www.sheffieldchildrens.nhs.uk/journal-club.htm

Bristol Story 3 – And one of the recipes – oat and chocolate chip

Ingredients:
- 100g porage oats, 300ml milk
- I egg, 125 ml vegetable oil, 150g dark brown soft sugar 125 g chocolate chips, 125g chopped pecans,
- 150g flour, 4 teaspoons baking powder, 1 teaspoon salt

The process:
- Pre-heat oven to gas mark 6 / 200°C
- Combine oats and milk and stand for 15 minutes
- Grease muffin tin cups or use cases
- Sir egg, oil, ¾ of the sugar, chocolate and ¾ of the pecans into the oats/milk mixture
- Combine flour, baking powder, salt
- Add this to the mixture – gently stir till just moist
- Two thirds fill each cup with the mixture
- Sprinkle tops with remaining sugar and nuts
- Bake for 20 -25 minutes
- Serve to colleagues!

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http://www.sheffieldchildrens.nhs.uk/journal-club.htm

Bristol Story 4 – Interacting with Qulturum

Essence of story:
- Qulturum is a Swedish centre for development of improvement knowledge and renewal in healthcare which brings groups together with the aim of increasing quality
- The Head of Library Services joined a weekly team meeting of the hospital's Qulturum - a quality improvement hub where staff who specialise in areas such as patient safety, clinical effectiveness, risk, patient experience and PALS work together to drive forward fostering a culture of improvement throughout the organisation
  http://www.ruh.nhs.uk/media/news_homepage/2011_08_15_Health_Minister_Simon_Burns_visits_the_RUH.asp?menu_id=1
- This provides the opportunity for the librarian to be aware of Qulturum work plans
- And to demonstrate how to support them

Challenges and competencies:
- Providing a library service moulded to the needs of our user group
- Ability to network and establish relationships
- The challenge – the ability to explain what I do in clear, concise and persuasive terms

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http://www.ruh.nhs.uk/For_Clinicians/education/library/index.asp?menu_id=9

Bristol Story 5 – GASP ensuring awareness of guidance

Essence of story:
- GASP (the Guidelines Alerts Steering Process Steering Group ensures that the Trust responds to all new guidelines
- Knowledge Services searches for new national guidance using DH, Royal Colleges etc.
- Sends new information to the Clinical Effectiveness team
- This is then considered by GASP which communicates with the relevant clinicians
- Knowledge Services is an integral part of the process

Challenges and competencies:
- Directly links to business process
- Not a measured outcome but hopefully clinical benefit
- Makes Knowledge Services visible to senior clinicians

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http://www.rcht.nhs.uk/RoyalCornwallHospitalsTrust/OurServices/AZServices/L/LibraryServices/LibraryServices.aspx

Bristol Story 6 – The 'THINK' Programme

Essence of story:
- Approached by Practice Educator to devise and information skills programme for neonatal nurses
- Used this opportunity to devise a branded, blended learning programme with a view to rolling out to other groups after the initial pilot
- Piloted to 60 people in 3 groups of 20
- Programme consisted of two taught sessions and self directed study plus a supporting wiki

Challenges and competencies:
- Know the course was a success from positive comments given during sessions and from practice education but.............
- Evaluation – 8 evaluation forms returned out of 60 participants
- Will build surveys/evaluation into taught sessions in future
- Can use this feedback to promote to other groups

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Learning Objective 2

To explore the range of measures and practical approaches available for assessing and expressing value, both financial and non-financial and to consider which will work in the NHS context

To begin, start at the end

Usual approach
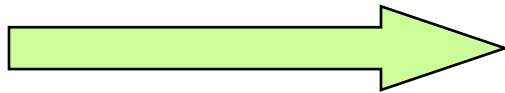
JUSTIFY

Services - Space - Promotion - Users - Results

INVEST FOR
RESULTS
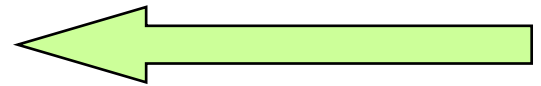
Impact approach

It's about management, not just measurement

The fundamental building blocks needed to put a value on LIS (1)

1. Be clear as to your business purpose/objective/value proposition for LIS

And..

Ensure that your business purpose/objective/value proposition for LIS is demonstrably aligned with your organisation's:
- ❑ vision
- ❑ strategy
- ❑ core objectives
- ❑ performance and measurement targets

The fundamental building blocks needed to put a value on LIS (2)

2. Agree the service(s) and level or levels at which you will be valuing LIS (e.g. Organisation, Directorate, Department/Function, Process, Service, Team)

3. Establish an owner/stakeholder for the LIS who will share responsibility for success

4. Establish a baseline for LIS - your starting/current position

5. Identify a future position for LIS - what success looks like/your desired state

The fundamental building blocks needed to put a value on LIS (3)

6. Use your organisation's existing methods and processes to create the appropriate business metrics/targets/performance indicators for LIS

7. Regularly assess progress, improvement and the value add of LIS against the baseline using tangible and intangible measures

8. Communicate successes, progress, learning with impact using current management channels and performance governance frameworks

9. Find and use meaningful external LIS benchmarks, good practice and latest LIS thinking to evidence the value of LIS to your organisation

Exercise 2

Sense checking your LIS against the building blocks that need to be in place to calculate and demonstrate value

'Traffic light' your LIS

Exercise 2 – objective and instructions

❑ The objective of this exercise is to assess the status of your LIS against the 9 Building Block statements

❑ Think of your service overall, rather than a specific service, and 'tick' the relevant 'traffic light' for each statement that best evidences the status of your LIS as at today

❑ Don't forget to write your name on the exercise sheet

A sense check – 'traffic light' your LIS

Key Steps	Building Block Statements	Assessment as at (date……)		
1	Clarity of business purpose/objective/value proposition of LIS and alignment of LIS with your organisation's vision, strategy, core objectives and KPI's	🟢	🟠	🔴
2	Agreement on the level or levels that you are/will be valuing LIS	🟢	🟠	🔴
3	Owner/stakeholder established for LIS - who will share responsibility for success	🟢	🟠	🔴
4	A baseline established for LIS - your starting/current position	🟢	🟠	🔴
5	A future position/desired state identified for LIS - what success looks like	🟢	🟠	🔴
6	Level of understanding of your organisation's existing methods and approaches to value, metrics, KPI's etc	🟢	🟠	🔴
7	Regular assessment of progress, improvement and the value add of LIS against the baseline using tangible and intangible measures	🟢	🟠	🔴
8	Communicating successes, progress and learning with impact using existing business management channels and performance governance frameworks	🟢	🟠	🔴
9	Access to meaningful external LIS benchmarks, good practice and latest LIS thinking to evidence the value of LIS to your organisation	🟢	🟠	🔴

Your name:

🟢 **In place and fit to support LIS 'Calculating and demonstrating value'**
🟠 **In place but with room for improvement to support LIS 'Value'**
🔴 **Not in place and introduction would benefit LIS 'Value'**

Sense check from Bristol – 05/10/12

Key Steps	Building Block Statements	Assessment as at (date……)		
1	Clarity of business purpose/objective/value proposition of LIS and alignment of LIS with your organisation's vision, strategy, core objectives and KPI's	7	15	2
2	Agreement on the level or levels that you are/will be valuing LIS	3	10	11
3	Owner/stakeholder established for LIS - who will share responsibility for success	4	13	7
4	A baseline established for LIS - your starting/current position	11	10	2
5	A future position/desired state identified for LIS - what success looks like	5	17	3
6	Level of understanding of your organisation's existing methods and approaches to value, metrics, KPI's etc	4	12	9
7	Regular assessment of progress, improvement and the value add of LIS against the baseline using tangible and intangible measures	1	18	5
8	Communicating successes, progress and learning with impact using existing business management channels and performance governance frameworks	2	18	4
9	Access to meaningful external LIS benchmarks, good practice and latest LIS thinking to evidence the value of LIS to your organisation	8	14	1

● In place and fit to support LIS 'Calculating and demonstrating value'
● In place but with room for improvement to support LIS 'Value'
● Not in place and introduction would benefit LIS 'Value'

Scores from York, London, Birmingham

Key Steps	Building Block Statements	Assessment as at (date……)		
1	Clarity of business purpose/objective/value proposition of LIS and alignment of LIS with your organisation's vision, strategy, core objectives and KPI's	19	40	10
2	Agreement on the level or levels that you are/will be valuing LIS	12	26	31
3	Owner/stakeholder established for LIS - who will share responsibility for success	17	35	17
4	A baseline established for LIS - your starting/current position	22	33	12
5	A future position/desired state identified for LIS - what success looks like	8	42	20
6	Level of understanding of your organisation's existing methods and approaches to value, metrics, KPI's etc	8	34	28
7	Regular assessment of progress, improvement and the value add of LIS against the baseline using tangible and intangible measures	6	53	9
8	Communicating successes, progress and learning with impact using existing business management channels and performance governance frameworks	3	53	13
9	Access to meaningful external LIS benchmarks, good practice and latest LIS thinking to evidence the value of LIS to your organisation	21	41	6

🟢 **In place and fit to support LIS 'Calculating and demonstrating value'**
🟠 **In place but with room for improvement to support LIS 'Value'**
🔴 **Not in place and introduction would benefit LIS 'Value'**

Worked example for Document Delivery

Key Steps	Building Blocks	Name of LIS Service - Document Delivery
1	Business purpose/objective/value proposition	To provide access to documents and other materials not held in the local content collection/e-Library. Enable users to access and read material that will have an impact on their job speedily and efficiently
2	Level/Group focus of measurement	As all users potentially benefit (service available to all), measure at Service level. Sample specific user groups periodically to ascertain satisfaction
3	Establish an owner for the service	Needs a business owner. If not, the senior manager to whom the LIS reports must assume this responsibility and support the LIS manager. This service will feature in the LIS strategic plan
4	Establish baseline	Cost efficiency (use volume/total cost of service p.a.); Use by customer segments. Evidence of satisfaction with service/ benefit/value. The cost to the organisation of customers doing this for themselves using alternative sources of supply
5	Future position required	Ensure that service is provided at lowest cost/highest speed. Is the appropriate level of LIS resources dedicated to supporting/delivering the service? Regular review of all sources and resources for materials needed by customer groups
6	Use any existing organisational approaches/KPIs	Improved turn-round times. Increased levels of user recognition that the service is available. Trends in use by specific customer segments. Process /cost improvement KPIs. Targeted savings. ROI. Estimate risks to customers and organisation of ceasing this service
7	Periodicity (when) of assessment	Review aligned with budgeting process timing. Need to understand the factors that trigger changes in demand. Review patterns of usage and demand trends
8	Reporting (how) of success, impact and results	Report on targeted customer satisfaction survey(s) within LIS reports. Reports made through the budgeting process (trends and costs) i.e. evidence, plus exception reports if situation/demand warrants
9	External benchmarks	The cost of a British Library loan or other document supplier / consortium. NHS benchmarks – National or regional

There are many techniques available to calculate and demonstrate value

Calculating and demonstrating value

	Input/output	Gain/benefit
Qualitative	Acknowledgements Follow–up Forms & Interviews Recommendations Case Study Service Level Agreements	Critical Incident Technique Story Capture Capability Assessments Customer Surveys Trend Monitoring: • Innovation Capital • Customer Capital • Human Capital Key Performance Indicators
Quantitative	Balanced Scorecard Usage Trends User Segmentation Stakeholder Engagement Cost Savings Cost Benefit Analysis Performance Against Targets Cost - Efficiency Cost - Effectiveness Quality Indicators	Risk Register Reviews Return on Investment Impact Analysis Trend Monitoring: • Productivity Levels Process Improvement

The metric

Input/output   The focus of the technique   **Gain/benefit**

Balanced Scorecard – an example of an 'holistic' approach to measurement

Financial

How does the LIS look to stakeholders?

At what must LIS excel?

Customer

Vision & Strategy

Internal business process

Learning & Growth

How do customers see LIS?

Can LIS continue to improve and create value?
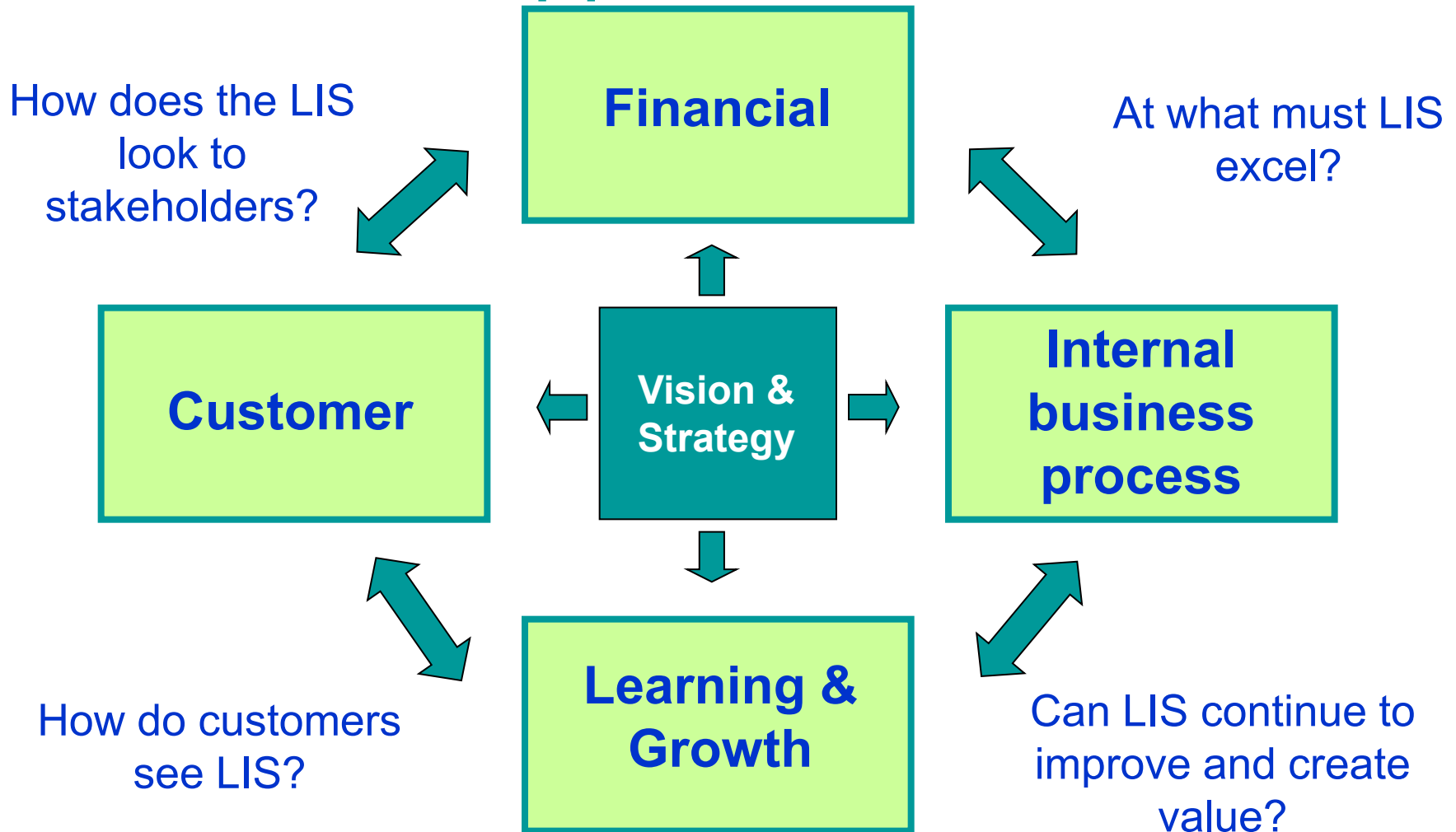
KPI for Mediated Search: increasing value

KPI Checklist	KPI Notes
Objective	To measure the influence of the Mediated Search service provided by LIS on patient care, risk reduction, evidenced based practice, cost savings
Alignment with organisational strategy	KPI support the organisation's objectives to improve the quality of patient care, reducing risk, and demonstrating use of evidence base in decisions.
Alignment with the Benefits Plan	KPIs underpins three specific areas of the Benefits Plan – 1) evidence based decisions, 2) risk reduction 3) cost containment
Baseline	Number of mediated searches where search requests indicate that search is needed for one of the purposes above; Customer feedback on the value of these searches;
Target performance	1) Increase in searches specified as being required for specific business purposes 2) 70% of customers evidence use and level of influence of the research for these purposes
Formula/calculation	Number of searches where requested for clear business purpose as above vs. total number of searches Number of requestors providing feedback vs. Total requests made
Frequency of measure	Quarterly
Data source	LIS search records; customer feedback esp. willingness to be quoted
Who measures and reports?	Name….
Who acts on data?	Names….

ROI – an example of a 'metric' approach to measurement

❑ Return on Investment calculation

    ❑ **ROI** = $\dfrac{\text{Gain from investment - Cost of investment}}{\text{Cost of investment}}$

❑ To complete the calculation in LIS you need:

    ❑ To understand the **Costs** (direct and indirect) of providing the service and alternatives

    ❑ To understand the **Gain** (direct and indirect benefits) realised from use of the service and be able to monetise these (translate them into a cash figure)

Collect Data	Calculate Costs	Monetise Gains	Calculate ROI
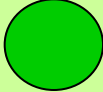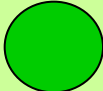
ROI example for Mediated Searches for a specific function/user group

❑ **ROI** = Gain from investment - Cost of investment
Cost of investment

Collect Data	Calculate Costs	Monetise Gains	Calculate ROI

Collect Data
- Number of Mediated searches per function
- *Number of users by function*
- Total costs of LIS resources providing the search service
- Total no. of searches
- Salary costs pa. – average for user group/function
- Alternative services (costs, time to access)
- Users feedback on benefits and value

Calculate Costs
- Average cost of LIS resources per Mediated search
- Total LIS cost of Mediated searches for function
- Average salary cost per user for function/segment
- Cost of alternative services per search e.g. Royal College
- **Cost of investment = cost of services for function**

Monetise Gains
- Assess time per user without LIS support minus time per user with LIS support
- Calculate value of time to users saved by LIS in £s
- Estimate value in £s of other value/benefits to work– time saved, risk avoided etc.
- Assess time per user/cost of alternative service = this cost avoidance is a gain
- **Monetise gains per average user and per function/user group**

Calculate ROI
- **Calculate ROI for function/user group**
- And calculate ROI for alternative services so you can
- Compare LIS ROI per enquiry per user with alternative services

Presenting the ROI calculation

Metric	Value	Health of service	Trend over 1 year
User satisfaction with LIS - trend	xx %	🟢	⬆
Value of time saved per service by total users	£ nnnnnnn	🟢	⬆
Other value accorded to service by total users	£ dddddd	🟢	⬆
Cost of providing service to users	£ bbbbbbb	🟢	⬇
ROI	$\dfrac{(n+d) - b}{b}$		⬆

Adapted from George Scotti, Director Channel Marketing, Springer, SLA, 2009

Exercise 3

Applying your experience, stories and learning from today thus far to value and assess an NHS LIS service or product

Exploring what will work in the NHS context

Exercise 3 – objective and instructions

❑ The objective of this exercise is to explore which techniques for calculating and demonstrating value work best for specific LIS services

❑ The services we will look at are:

❑ Alerting Services

❑ Information Skills training

❑ e-Resources/e-Library

❑ Current Awareness Services

An example for Mediated Searches

Qualitative

The metric

Quantitative

Recommendations

Critical Incident Technique

User segmentation

Process Improvement

Input/output   The focus of the technique   **Gain/benefit**

Mapping techniques to services

Qualitative

The metric

Quantitative

A	B
C	D

Input/output   The focus of the technique   **Gain/benefit**

Alerting Services – Bristol 5/10/12

Qualitative

The metric

Quantitative

Input/output   The focus of the technique   **Gain/benefit**

Recommendations - Use of Follow-up Forms

Customer Surveys

Trend Monitoring: Associated with productivity

Acknowledgements: Feedback from readers/users on current awareness bulletin – formal/informal

Customer Segmentation: Target specific users with specific services

Critical Incident Technique

Story Capture

Focus/user group feedback

Usage Trends: numbers signed up to Library CA bulletin

Cost Effectiveness: Library staff time to set up worth end result

Balanced Scorecard: Target number of people using Alerting Service

Cost Savings: Time (money)saved when staff have information pushed at them

User segmentation: Identification/ Targeted CA Web pages/ bulletins for different staff groups

Customer Surveys: Use of Alerting service

Risks identified and added to Risk Register: (Health and Safety Bulletin)

Cost reduction: Increased journal access reduces cost per access

Current Awareness Services – Bristol 5/10/12
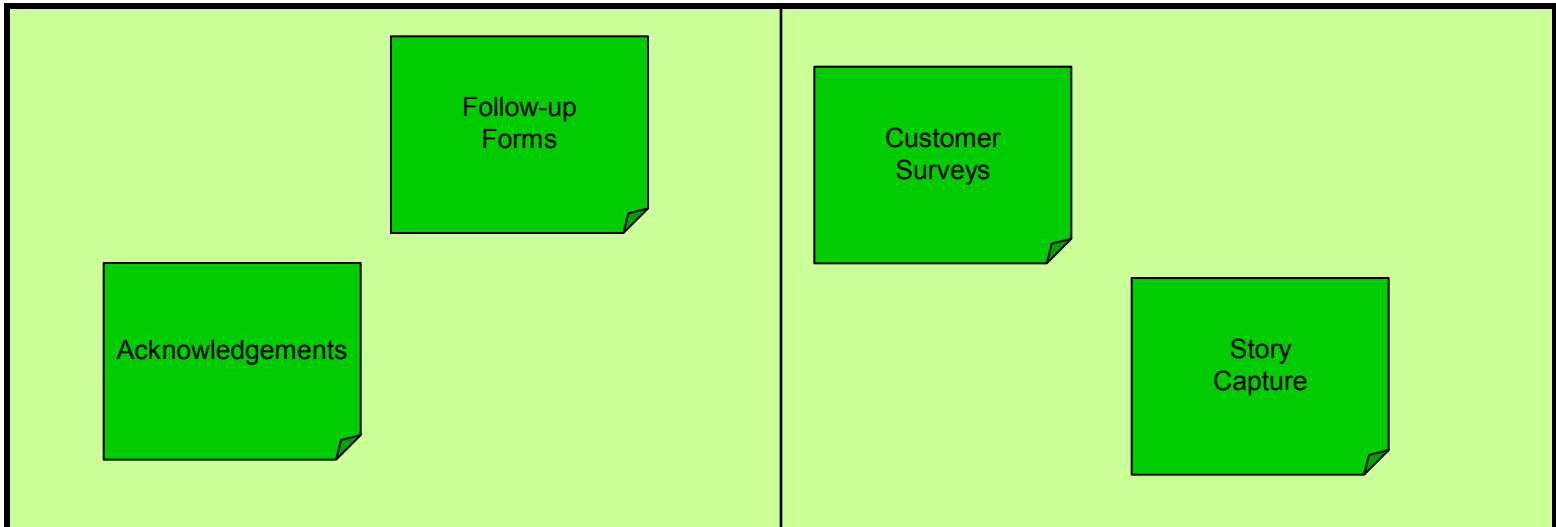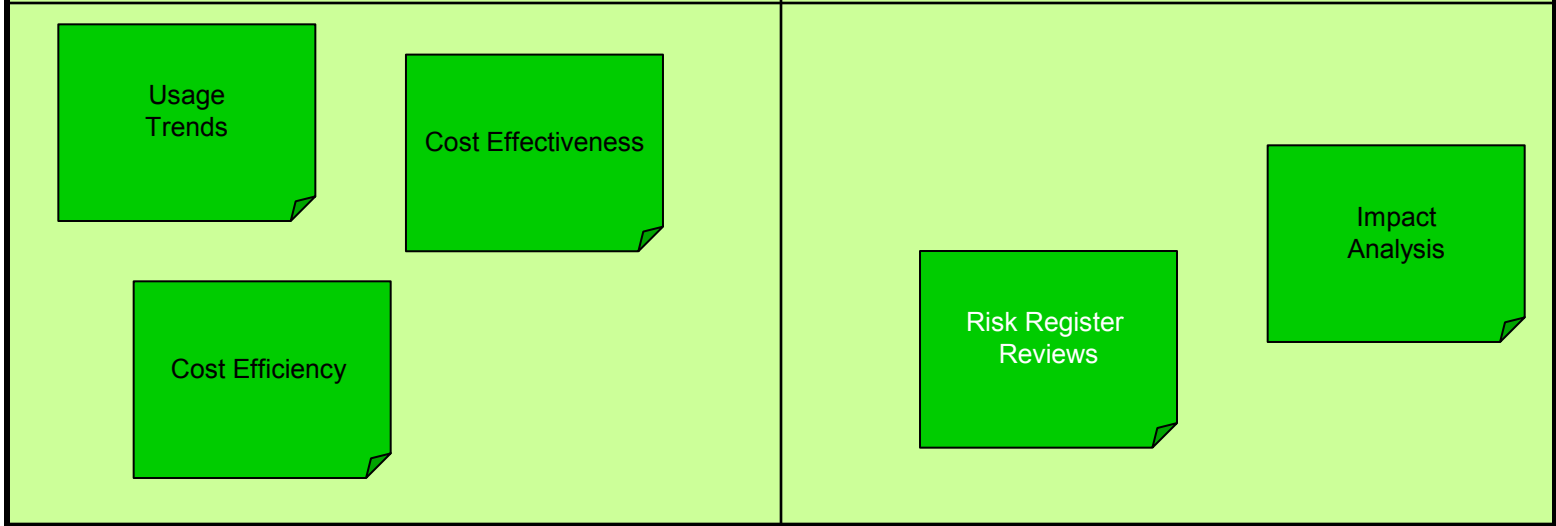
Qualitative

Follow-up Forms

Customer Surveys

Acknowledgements

Story Capture

The metric

Usage Trends

Cost Effectiveness

Impact Analysis

Risk Register Reviews

Cost Efficiency

Quantitative

Input/output   The focus of the technique   **Gain/benefit**

e-Resources/e-Library – Bristol, 5/10/12 (1)

Qualitative

Acknowledgements

Follow-up Forms

Interviews

Recommendations

SLAs

Case study

Use KPIs set up by Trusts

Capability assessment

Story Capture

Trend Monitoring – Innovation Capital ? survey

Customer Capital

Customer Surveys

User Needs Analysis

Trends – Human Capital;

Critical Incident Technique - use story capture

The metric

Usage Trends – Up/Down

Case study – To demonstrate the impact of e-resources

Trends and Trend Monitoring – Is it still delivering value for money?

ROI Cost benefit of time saved

Cost Efficiency – to show this is the best way of providing these resources

Cost Effectiveness How much per download?

Impact analysis

Process Improvement - More efficient sourcing of information

Market Segmentation %age of Drs vs Nurses vs others

Quantitative

Input/output   The focus of the technique   **Gain/benefit**

e-Resources/e-Library – Bristol, 5/10/12 (2)

Qualitative/Input-output

- ❑ Acknowledgement: this e-resource contributes to my professional development
- ❑ Case Study: work with individual users to show input of resources into their work
- ❑ Follow-up Forms: to ensure users appreciate, can use and has the service had an impact on their work – to sample views on a new service
- ❑ Interviews e.g. with specific tutors to choose resources for their groups
- ❑ KPIs: use KPIs set up by Trust to demonstrate appropriate resource purchase
- ❑ Recommendations – no. of doctors wanting up to date information
- ❑ SLAs – with providers e.g. use statistics

Qualitative/ gain-benefit

- ❑ Capability Assessment: knowledge that clinicians have obtained/gained from e-resources ; show how human capital meets organisational priorities
- ❑ Customer Capital: is this an improvement on our services for customers?
- ❑ Customer Survey: satisfaction with e-resources
- ❑ Critical Incident technique: e-journal article used to support new procedure/ use story capture
- ❑ Story capture: where has information been used to benefit patient
- ❑ Trends:
  - ❑ In human capital (skills survey)
  - ❑ In innovation capital (survey?)
- ❑ User needs analysis: importance of resource to segmented group

Training in Information skills – Bristol 05/10/12

Qualitative

Follow-up Forms and Interviews

Story capture - Ask for help

Capability Assessment – Before and after self assessment

Customer Survey – tells us why – but poor response

Customer Capital trends – Uptake increase in follow- on use

KPI: Target groups and measure uptake

Innovation Capital Trend: reason for training

KPI: Training Compliance Levels e.g. Support for e-learning

Human Capital Trends: Better at finding evidence

The metric

Usage Trends – attendance statistics

User Segmentation

Balanced Score Card

Performance Against Targets

Productivity Levels

Cost Efficiency

Quality Indicators

Impact Analysis

Quantitative

Input/output   The focus of the technique   **Gain/benefit**

Calculating and demonstrating value underpins performance improvement

Collect Data

Use the information to:
- ❏ Maintain data sets
- ❏ Identify themes/patterns
- ❏ Compare with benchmarks

Use the knowledge to:
- ❏ Report value
- ❏ Manage priorities
- ❏ Improve services

Calculate Costs

Demonstrate Value

The cycle of using value for performance improvement

Use the knowledge to:
- ❏ Highlight direct gains
- ❏ Understand indirect gains
- ❏ Capture value stories

Use the information to:
- ❏ Build a cost base
- ❏ Assess/review fixed costs
- ❏ Monitor variable costs

Assess Value Monetise Gains

Lunch

A practical framework for LIS in NHS

An organisational champion

A benefits plan

A baseline

Techniques for measuring gain and benefits

THE KEY ENABLERS

Underpinned by

Core skills and competencies
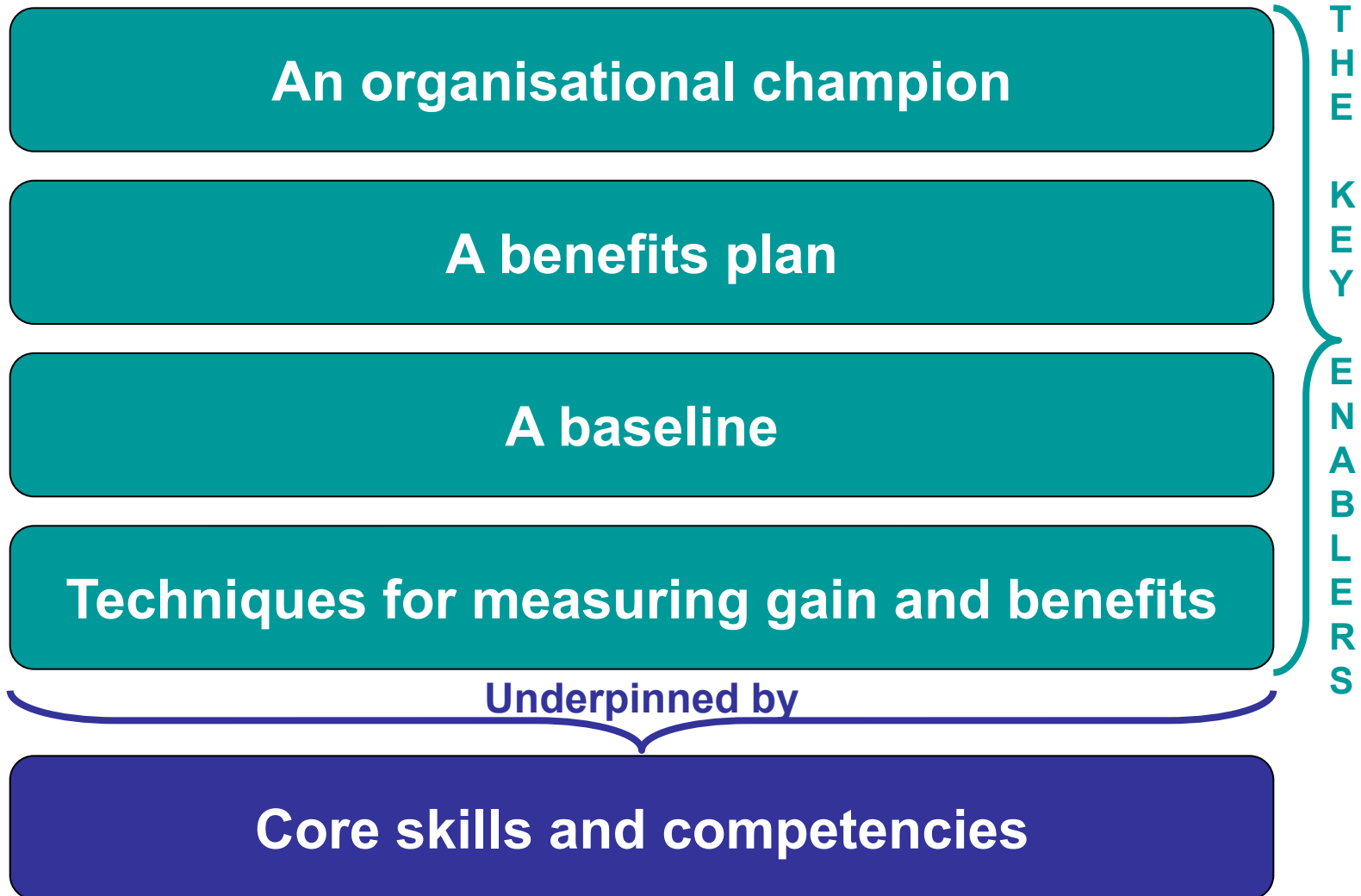
An organisational champion

❑ Senior manager

❑ Information and knowledge aware

❑ Acts as champion/responsible owner

❑ Sounding board - service and value

❑ Prepared to be a partner

❑ Prepared to communicate value

❑ Strategic link between the information/knowledge service, the organisation and its stakeholders

The Champion

Finding and securing champions

❑ A champion is a senior (or relatively senior) person with clout, often a manager. They don't need to be a direct user but will need to understand the actual and potential value of your services. They must be prepared to act as the business owner of all or specific services on behalf of your organisation so you <u>may</u> need more than one

❑ You want the champion(s) to work with you to be a sounding board on the service(s) and how to demonstrate their value. You want them to communicate value to colleagues to ensure service value is recognised

❑ How to find them?

  ❑ Firstly identify potential champions; the approaches for stakeholder mapping outlined at the event are relevant. Who ideally would be your champions? People on Operating Boards/Executive teams? The next layer down? Which roles/functions/groups use most of your services or the most expensive services? Who leads them?

  ❑ Develop a short list using criteria to help e.g. Who do you know already? Do you have colleagues that know your champion well/can help you make contact? Who is most influential, who is most approachable? Find out what approaches will work with specific people

  ❑ Develop a contact plan – people and approaches and pilot

  ❑ Your contact plan – phone or face to face? Formal or informal encounter? Objective for first contact? Value proposition for the champion? "I'm responsible for service X and want to improve its value to the organisation. I think you can help by......". Make it clear that you will need 15 minutes max at occasional intervals ....

  ❑ Do a pilot – rehearse with a colleague and have a go – then learn from your pilot and extend

  ❑ Review your approaches at regular intervals

A benefits plan in outline

Element	Typical content
Purpose of service	Clear and concise statement of why the service is required, what it is intended to do, and its value proposition
Service description	A service plan – a description of what it will look like, how it will be developed and delivered, its quality standards, and who will receive/use it
Benefits expected/sought by customers	The advantage/profit/improvement/usefulness customers want to gain from the service
Links to function/team/ organisational goals	Which function/team goals and targets will be enabled by the service? How do these link to the organisation's drivers, objectives, and goals?
Performance targets	Levels of service performance (targets and stretch targets) to be achieved or aimed for
Benefit measures	What will demonstrate that the service is delivering the benefit(s) to customers and show its impact on functional/team/organisational goals? What is the best mix of quantitative, qualitative, tangible, and intangible measures?
Benefit sources	The sources of data (costs/facts), information (context/use) and knowledge (benefits realisation) for the measures
Reporting	Frequency, format, communication channels, responsibility for reports
Responsibilities	Names of key business stakeholder/responsible IM/KM/LIS professional

A benefits plan in outline - Alerting

Element	Typical content
Purpose of service	To provide Orthopaedic clinical teams with regular updates in developments in clinical and post – operative care; the teams face the challenge of decreasing the number of bed days and the incidence of post – operative infections
Service description	Monthly update of references from sources agreed with users including direct links to articles featured delivered to orthopaedic Intranet site. Significant articles emailed. Site enables users to comment on articles
Benefits expected/sought by customers	Saving time – in setting up alerts and locating articles. Certainty that they're on top of current developments. Delivery format enables team to discuss new developments quickly.
Links to function/team/ organisational goals	Clinical indicators – reduced bed days and infection rates that can be directly linked to information gained through alerting and its translation into practice
Performance targets	Users: No surprises – new information influences practice quickly – decisions more informed – service used by all team members – reduction in time to obtain new information LIS: Document delivery requests reduce; trends in recipients infer value
Benefit measures	User focus: time saved; impact analysis of service on practice LIS focus: cost efficiency and cost effectiveness of service
Benefit sources	1. Review how team currently manage personal alerting and sharing within the team and the resource (time) required. Establish level of document delivery requests 2. Survey shows team confident in knowledge and committed to partnering to develop the service further. Time to use current literature reduced
Reporting	Pro-active reporting of success by clinical team. Comments/stories used to promote service. To colleagues. Results communicated to LIS manager as part of regular contact. Champion advised of trends. Featured in annual LIS report
Responsibilities	Head of Clinical Orthopaedics and Library Specialist partnership

A 'traffic light' baseline checklist

Key Checks	Baseline Statements	Assessment as at (date)		
1	Shared understanding of the characteristics of the starting/current position – the basis from which to measure and evidence change	🟢	🟠	🔴
2	Agreement on what data, metrics and stories illustrate these characteristics i.e. how they are currently measured, described or assessed	🟢	🟠	🔴
3	The future position/desired state – the benefits and changes which the service is aimed at delivering	🟢	🟠	🔴
4	Agreement on which characteristics will be the focus of measurement and the measures and measurement techniques to be used	🟢	🟠	🔴

🟢 **In place and fit to provide a baseline against which change and value can be evidenced**
🟠 **In place but insufficient information available to agree the baseline**
🔴 **Not in place and work required to gather information to inform baseline discussions**

Calculating and demonstrating value needs a mix of skills and competencies

Baselining

Business results focus

Financial planning

Business needs identification

Communication

Prioritisation

Benefits planning

Negotiating

Target setting

Influencing

Forecasting

Performance management

Demonstrating value

Data and trend analysis

Understanding value and impact

Pattern recognition

Presentation skills
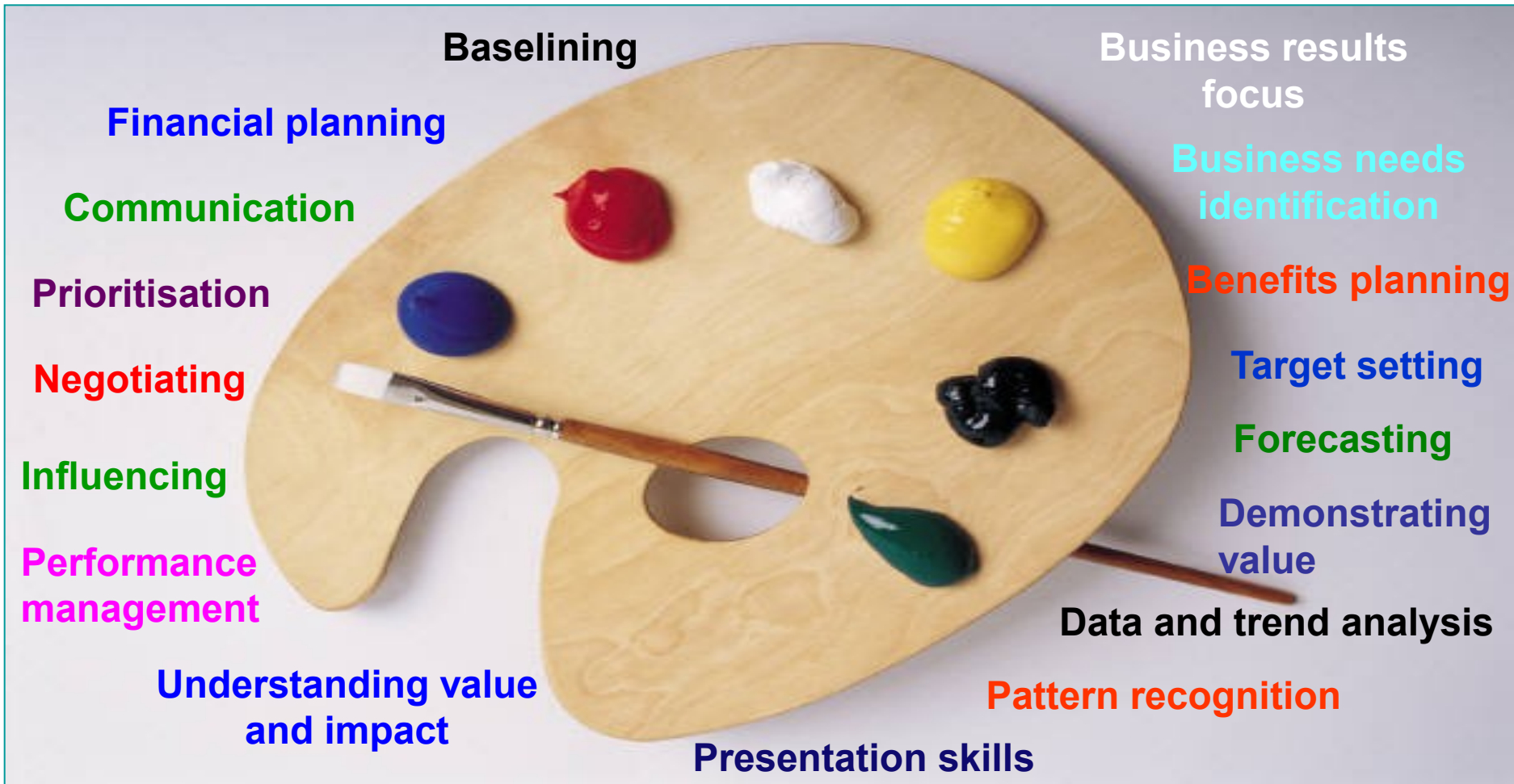
Learning Objective 3

To identify ways in which the information gathered via NHS costing techniques and impact toolkits can be used in powerful value statements for key stakeholders

Stakeholder management – mapping, influencing and segmenting

The 'value' and 'reporting' requirements of stakeholders differ
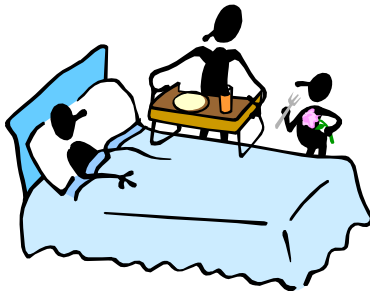
**The Users
(the direct users of LIS)**

The Champion
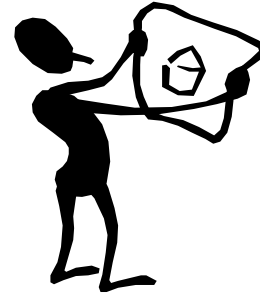
The Function Head
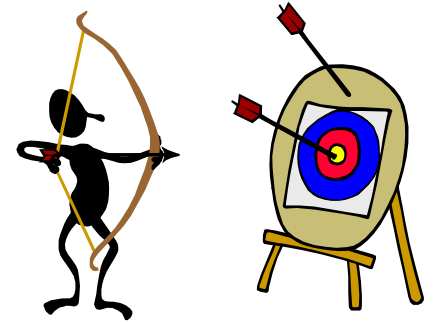
**The Project
(or Project Manager)**
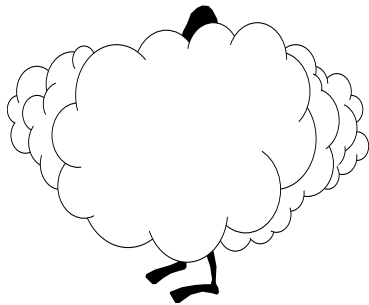
**The non-user
(uninterested or dissatisfied)**

The Boss (and their boss)
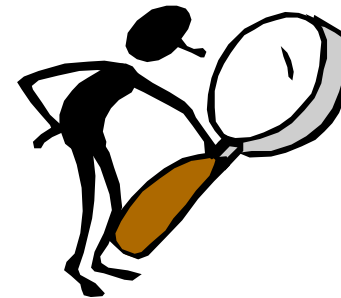
**The Finance Director
(or Operations Manager)**
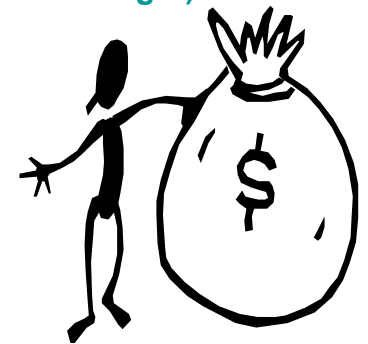
**The organisation
(Executive Committee/
Directors/
Board)**

But what does LIS need from them?

Identifying, mapping and influencing stakeholders – 6 key steps

Identify Stakeholders	Map Stakeholders	Segment Stakeholders	Research Stakeholders	Develop & Implement Strategy	Review Map & Strategy
Step 1	Step 2	Step 3	Step 4	Step 5	Step 6
Identify the stakeholders using your stakeholder definition and 'for what purpose' question	Map the stakeholders identified against levels of importance and influence	Further segment the stakeholders by identifying and applying meaningful criteria	Research the stakeholders to understand their motivation and preferences	Develop and implement an influencing strategy for your target stakeholders	Review and update your stakeholder map and strategy based on your learning and successes

Stakeholder map - funding

High

Low

Level of importance of LIS to stakeholder

Low   Level of influence over the allocation of funds   High

The Project (or Project Manager)

The Champion

The users (the direct users of LIS)

The Function Head

The Boss (and their boss)

The organisation (Executive Committee/ Directors/ Board)

The non-user (uninterested or dissatisfied)

The Finance Director (or Operational Manager)

Stakeholder map - evidence

High

Low

Level of
benefit
of LIS
to
stakeholder

The Champion

**The users
(the direct
users of LIS)**

**The Finance
Director
(or Operational
Manager)**

**The Boss
(and their boss)**

**The
Function
Head**

**The Project
(or Project
Manager)**

**The organisation
(Executive
Directors/Committee/
Board)**

**The non-user
(uninterested
or dissatisfied)**

Low   Level of use of LIS services by the stakeholder   **High**

Exercise 4

The ingredients to create powerful value statements for key stakeholders

Café conversations to explore key aspects of a benefits plan

Exercise 4 – objective and instructions

❑ The objective of this exercise is to create powerful value statements for key stakeholder types and to consider what makes a statement great

❑ The stakeholder types we will look at are:

   ❑ An Individual

   ❑ A Function

   ❑ The Organisation

❑ The service we will look at is Alerting Services

...and we will look at Alerting Services through 3 aspects of a benefits plan

Element	Typical content
Purpose of service	Clear and concise statement of why the service is required, what it is intended to do, and its value proposition
Service description	A service plan – a description of what it will look like, how it will be developed and delivered, its quality standards, and who will receive/use it
Benefits expected/sought by customers	**The advantage/profit/improvement/usefulness customers want to gain from the service**
Links to function/team/ organisational goals	**Which function/team goals and targets will be enabled by the service? How do these link to the organisation's drivers, objectives, and goals?**
Performance targets	**Levels of service performance (targets and stretch targets) to be achieved or aimed for**
Benefit measures	What will demonstrate that the service is delivering the benefit(s) to customers and show its impact on functional/team/organisational goals? What is the best mix of quantitative, qualitative, tangible, and intangible measures?
Benefit sources	The sources of data (costs/facts), information (context/use) and knowledge (benefits realisation) for the measures
Reporting	Frequency, format, communication channels, responsibility for reports
Responsibilities	Names of key business stakeholder/responsible IM/KM/LIS professional

Café conversations to create powerful value statements

Café 4

What makes a powerful value statement great?

Café 1

An individual stakeholder

The organisation

Café 3

A function/team

Café 2
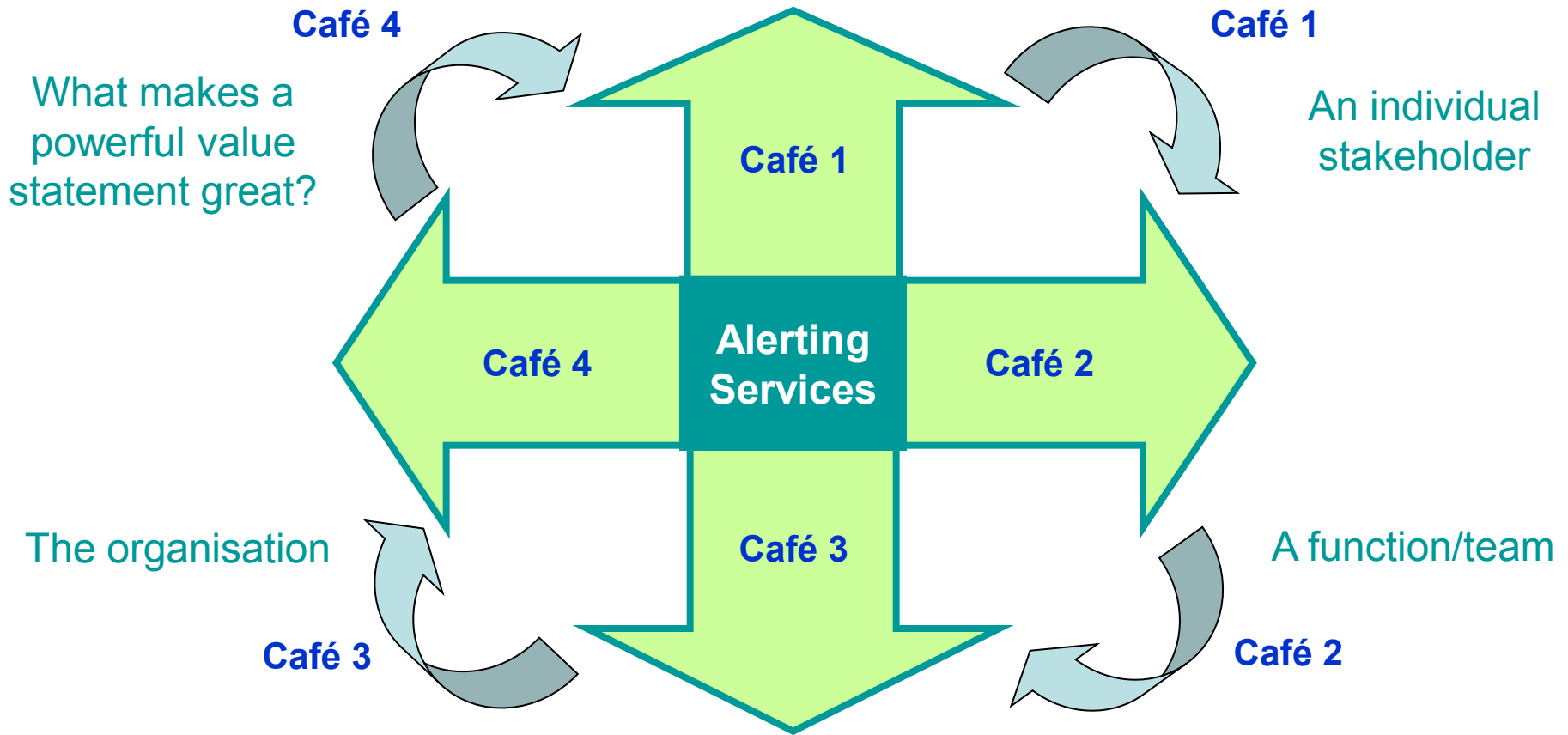
Café conversations informed by the selected measurement techniques, key aspects of the benefits plan, your own experience, and the information gathered via NHS costing techniques and impact tool kits

Café 1 – an individual

Alerting Services	
The advantage, profit, improvement, usefulness an individual wants to gain from the service	❑Keeping up to date – cutting edge, latest and most specific information – knowledgeable ❑CPD requirements ❑Saving time (short cut to staying ahead) = saving money ❑Reliable – immediate – timely – avoid information overload ❑Cost effective – minimum effort ❑Push service – LIS stimulates user to receive (tailored) alerts
Which individual goals and targets will be enabled by the service? How do these link to the organisation's drivers, objectives, and goals?	❑CPD, training and professional requirements (mentoring/coaching other groups) ❑Passing exams – personal development goals – career development ❑Appraisal goals mapped to wider organisational goals (and NHSLA targets) ❑Job satisfaction – better informed staff – staff retention ❑Providing quality service – responding to organisational goals – introduce new services ❑Improved patient outcomes – fewer patient referrals – fewer re-admissions ❑Support for research, special projects, new procedures and treatments
Levels of service performance (targets and stretch targets) to be achieved or aimed for	❑Training compliance ❑Legal requirements ❑Agree 'contract' with users about what they/LIS consider to be timely ❑Need to evidence improvement demonstrated by the service ❑Can be provided 24/7 in format of choice and backed-up with full text ❑Amend research strategy if not delivering what users need

Café 2 – a function/team

Alerting Services	
The advantage, profit, improvement, usefulness a function/team wants to gain from the service	❑Identification of gaps in knowledge within the team – a targeted service ❑Meeting team and organisational outcomes – team development (Journal Clubs) ❑Enables/supports talent/skills mix development ❑Providing the latest research, including summaries and synthesised knowledge ❑Save time (teams are very busy) and effort and therefore money ❑E.G. for Emergency Dept Team – helps them meet 4hr and other key targets
Which function/team goals and targets will be enabled by the service? How do these link to the organisation's drivers, objectives, and goals?	❑CPD of the individuals and team to meet organisational drivers, including: patient safety, reduction of risk, value for money, time saved ❑Continuous improvement model ❑Sharing knowledge ❑Improved clinical decision making
Levels of service performance (targets and stretch targets) to be achieved or aimed for	❑To be relevant and meet team needs on an ongoing basis ❑Feedback on how often people actually apply the information they have received ❑Other teams ask for the service ❑Speed of service and improve quality of care ❑Satisfy patient involvement groups ❑Fewer complaints

Café 3 – the organisation

Alerting Services	
The advantage, profit, improvement, usefulness the organisation wants to gain from the service	❑Better skilled and informed workforce – CPD ❑Better patient care and quality of care – improved reputation – patient choice ❑New guidelines of care ❑Clinical Governance – risk reduction ❑Quality – cost-saving – more effective equipment ❑Promoting EBP
Which organisational targets and objectives will be enabled by the service?	❑Patient safety – minimising risk – waiting times – infection control targets ❑Human Capital development – workforce education targets ❑Patient care will be evidenced based ❑Regulatory requirements ❑Dissemination of key information ❑Organisation-wide engagement ❑FT status application (outcome 14)
Levels of service performance (targets and stretch targets) to be achieved or aimed for	❑Evidence provided – anecdotal/cost effectiveness ❑Training in setting up – feedback via surveys or by specific drugs/processes ❑Alerting service in key functions/committees (need map identifying) ❑% uptake by staff groups e.g. infection control ❑Identify regulatory body targets – legal requirements – compliance ❑Reduce length of stay – cost benefits

Café 4 – what makes a powerful value statement great?

Alerting Services	
What differentiates a powerful value statement from a corridor/meeting conversation?	❑Formal and prepared – planned (based on shared understanding of Alerting Service) ❑Relates to organisational objectives and targets these with specific messages ❑Powerful enough to be appropriate in different circumstances – succinct but informative ❑Must be outcome related and evidenced based ❑Critical to LIS – must be running through everything we do ❑Aligned with the language used by management and the values of our organisation
What makes a powerful value statement engaging and memorable?	❑Appropriate language, short and direct – no Library terminology ❑Need to have 'Library' in there somewhere ❑Speak to them in their language ❑Language not too complex or advanced (do we use management jargon?) ❑Relevant – engaging – memorable – topical – up to date
For a powerful value statement to be great, what things (ingredients) need to be included?	❑Memorable – meaningful – not too long – grammatical – punchy ❑Needs to lock in with organisational objectives – include a figure or % ❑Language must ring true – easily understandable – solutions, not problems ❑Evolve – future-proofed – must sound sincere – and linked to their objectives ❑Make clear what's in it for them – what questions will they ask you? ❑Catchy beginning – importance of narrative

Café conversations in action (Bristol – 5/10/12)

Powerful Value Statements

❑ We used one Café conversation to consider what makes a powerful value statement great

❑ As noted in the Glossary of Terms and Definitions, a value statement *'is a powerful message that can be used to evidence to a customer how an LIS product or service contributes specific and indispensable value to that customer (or function/organisation). A value statement can also be used to convince a stakeholder or non-user that a product or service is a cost-effective investment'*

❑ When developing a value statement it is important to remember that:
  ❑ The value and reporting requirements of stakeholders differ (see Stakeholder Management slides for further information about segmentation)
  ❑ A good value statement is likely to include some facts (about the product or service); the context (through the eyes of the stakeholder); some information about 'what's in it' for the stakeholder (i.e. reasons why they should be interested); and the value (evidenced elsewhere or anticipated) to be gained by the stakeholder through use of the product or service

❑ When communicating or reporting a value statement it is important to remember that:
  ❑ There are many channels for communicating and reporting value and that is important to select the right one (or combination of channels) for the right purpose (see Reporting Value to Stakeholder slides for further information)
  ❑ You don't get a second chance to make a first impression, therefore always be prepared to share and communicate a value statement in meetings, conversations and in other examples of face to face interaction
  ❑ You will not necessarily know the impact of your powerful value statement unless you ask the recipient – and be prepared to learn from the feedback they provide
  ❑ Success is about achieving a 'win win' situation for LIS and the stakeholder
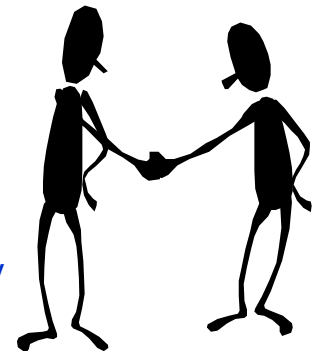
Reporting 'value' to stakeholders (1)

Formats	Notes	Frequency
Annual Report	Important in positioning LIS as a core service and enabler of organisational activity. Focus on key words and mentions	Financial Year or Calendar Year based
Benefits Plan	Important in highlighting the specific organsiational processes/activities targeted for benefit and improvement and in reporting progress (benefits realisation) and success	As agreed in the Plan and with Stakeholders
Case Study	Important in evidencing the before, during and after impact and benefit of an LIS service in the context of a project, organisational challenge, or area of good practice	Need or opportunity based
Email Update	Important for maintaining the profile of LIS using 'instant updates' that are easy to read and understand and evidence activity, priorities and progress	Set date/time – must not be missed
Financial	Important in ensuring that LIS is discussed at 'the Financial table' and in the context of intangible as well as tangible benefits	Aligned with Financial reporting milestones and timeline
Formal Report	Important in evidencing LIS activity and value at 'the Management table' and in the context of other departments, functions and projects	Weekly, Monthly, Quarterly
Intranet	Important as an information and knowledge source for all things related to reporting ROI to stakeholders. A place where facts, success stories and LIS services can be shop windowed	Need and opportunity based. Regular updates essential
Lessons Learnt	Important in evidencing LIS involvement in organisational activity through learning before, whilst and after doing and using LIS support to action this learning	Project or process review based

Reporting 'value' to stakeholders (2)

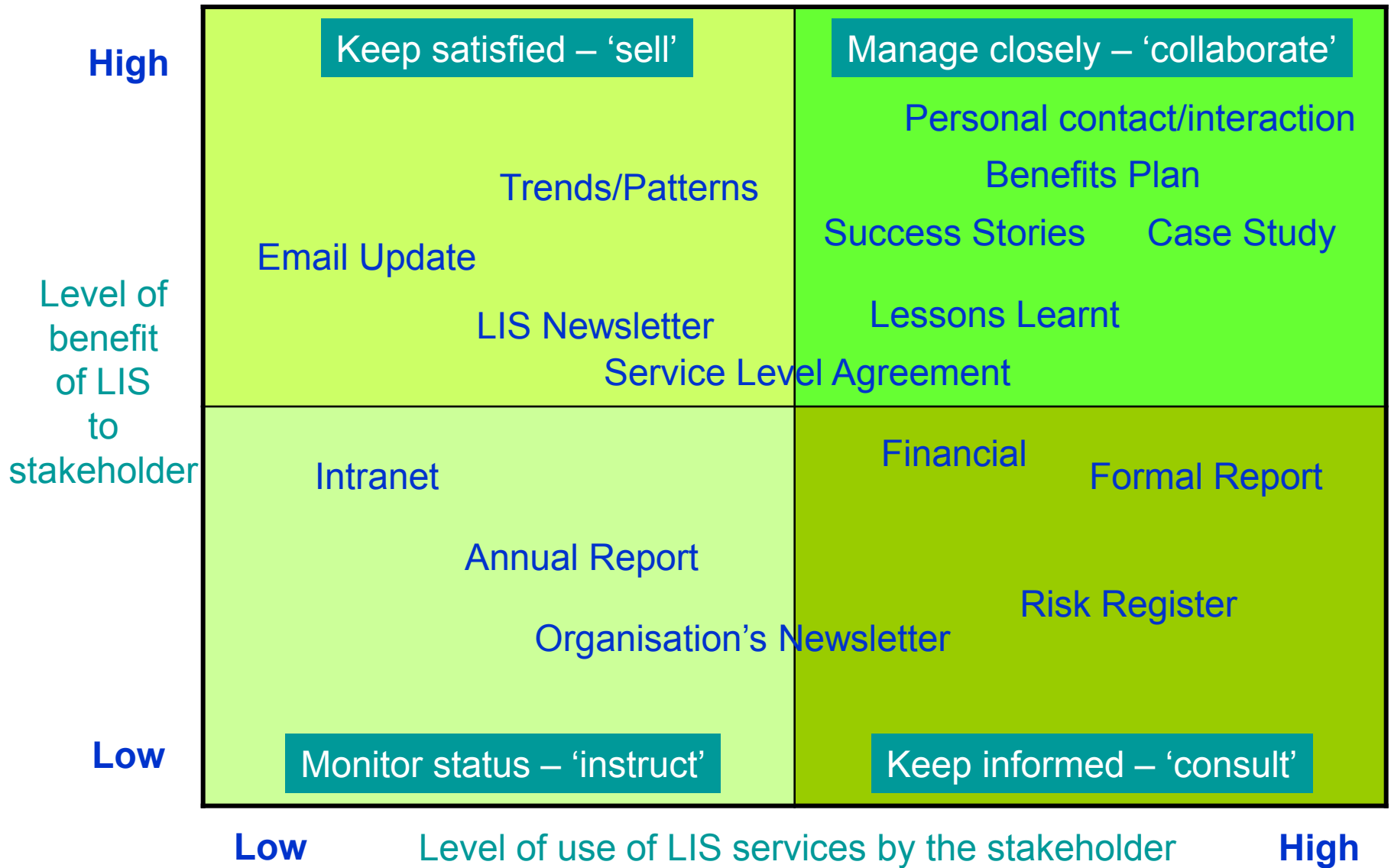| Formats	Notes	Frequency
LIS Newsletter	Important as a core channel (one controlled and published by LIS) to raise levels of awareness of LIS services and its role in enabling the organisation and individuals to achieve what they want to achieve	Monthly, Quarterly
Organisation's Newsletter	Important in evidencing LIS as a core part of organisational activity and its processes. A partner equal to other functions and departments	Monthly, Quarterly
Personal contact /interaction	Important in taking every opportunity (you don't get a second chance to make a first impression!) to get key LIS messages of benefit and value add across to a wide audience	24/7! And always be prepared
Trends/Patterns	Important for management information and to inform decision making of LIS and others in the organisation. Could include horizon scanning of LIS services and of areas of knowledge important to the organisation	Monthly, Quarterly will reporting/alerting as required
Risk Register	Important in ensuring that LIS activity is discussed at the 'risk management table' and in evidencing the alignment of LIS services with organisational risk and evidencing how these services help to mitigate the risks identified	Aligned with Risk reporting milestones and timeline
Service Level Agreement	Important in evidencing the shared agreement between the provider and recipient of the service and in providing the management framework for review and reporting progress against the service levels agreed. Should include an assessment of risk and an escalation procedure (for both parties) in cases of disagreement	As agreed between the provider and recipient
Success Stories	Important in sharing and evidencing success and improvement through use of and access to LIS services. Stories can include anecdotes and recommendations which are helpful in evidencing the results and benefits (the intangibles) that are hard to measure quantitatively	Need and opportunity based

Reporting 'value' map - funding

High

Level of importance of LIS to stakeholder

Low

Keep satisfied – 'sell'	Manage closely – 'collaborate'
Success Stories	Benefits Plan
Personal contact/interaction	Case Study
Lessons Learnt	Trends/Patterns
Email Update Service Level Agreement	
Intranet	Financial
LIS Newsletter Annual Report	Formal Report
Organisation's Newsletter	Risk Register
Monitor status – 'instruct'	Keep informed – 'consult'

Low   Level of influence over the allocation of funds   **High**

Reporting 'value' map - evidence

High

Level of benefit of LIS to stakeholder

Low

Keep satisfied – 'sell'	Manage closely – 'collaborate'
Trends/Patterns	Personal contact/interaction
Email Update	Benefits Plan
LIS Newsletter	Success Stories Case Study
Service Level Agreement	Lessons Learnt
Intranet	Financial Formal Report
Annual Report	
Organisation's Newsletter	Risk Register
Monitor status – 'instruct'	Keep informed – 'consult'

Low   Level of use of LIS services by the stakeholder   **High**

Learning Objective 4

To give each participant the opportunity to reflect on their learning and consider actions to take forward with their respective organisations

Exercise 5
What have we learnt?
What action will you take?

Group post it notes and themes

Action Planning Postcards

After Action Review

We considered two of the questions commonly used in after action reviews:

- ❑ What was supposed to happen?
- ❑ What actually happened?
- ❑ Was there a difference?
- ❑ **What did we learn?**
- ❑ **What action should we take**?

Reflections:

❑ Event has made lots of ideas concrete and usable

❑ We can use the tangible stuff we've created

❑ It is hard for LIS people to register what they do

❑ Persuading users to provide feedback is difficult – increasing connectivity with users will help

❑ We have the information to integrate the tools into coherent benefits plans for services.

Actions:

- ❑ Delegates: please complete feedback form
- ❑ IDW/SEW:
  - ❑ will add stories, muffin recipe, sense check scores, techniques and café outputs to slide deck plus information on ROI, Balanced Scorecard, benefits and sense check examples, information on finding and securing champions, and powerful value statements
- ❑ IDW: Action planning postcards will be posted on 5th November

- ❑ Bristol and the South West:
  - ❑ Pick up the 'Calculating and demonstrating value and impact' topic at next LIS managers' meeting e.g. measuring intangibles
  - ❑ Consider how the Annual Report contents can reflect LIS value
  - ❑ Could collective work on stakeholders e.g. mapping them across the region be useful?

Conclusions (1)

❑ Being good at what you do, and the service you provide, is no longer good enough

❑ The need to align with your organisation's priorities and evidence the ways in which LIS add value to it has never been so important

❑ Work with stakeholders to identify the services and benefits they need from LIS

❑ There are many ways to calculate and demonstrate value and it is important to build on and use the techniques that already exist in your organisation

❑ Maintain a focus on the critical few, rather than the important many, indicators of performance

❑ Calculating and demonstrating value underpins performance and improvement

Conclusions (2)

❑ In a tough organisational and economic climate an informed and successful LIS Manager will always be able to respond to the following key 'value' questions:

   ❑ *If you had a increased budget of X%, what would you do with it, why, and what value would you generate?*

   ❑ *If you had to cut your budget by X%, how would you do this, why, and what impact would this have?*

   ❑ *In what ways are you working to achieve/deliver more with less, why, and what is the benefit to the organisation?*

   ❑ *What is the value proposition of your LIS?*

❑ "The purpose of measurement in LIS is to provide the data, information and knowledge required to make decisions and take actions". Ward and Wooler 2011

SHALL Training Events 2012

Calculating and Demonstrating Value of NHS Library and Information Services

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