Recommendation of WPLC Analytics Workgroup

Background

This workgroup was formed to investigate the use of analytics on a statewide level.

Some expected outcomes of this project were:

- Creating and demonstrating a process, application models, and training for the use of analytics.
- Developing a common vocabulary and understanding of using data across the state.
- Determining ways to use data for developing and improving services.
- Determining ways to use data for targeting and promoting services.
- Determining ways to use concrete data about who is using services for advocacy purposes on a local and state level.

The workgroup started by identifying sample questions to be answered with data:

General usage
- How are specific library services being used and by whom?
- Who is not using the library and specific services and why?
- How is this changing at each library and on a statewide level?
- How can we increase usage by specific populations or for specific services?
- What are the borrowing patterns of materials?
- What is the impact of a change in service(s)? For example, what is the impact of a budgetary change on a service?

Satisfaction
- How satisfied is the local community with the library service they are receiving?
- How would the local community like to see library service improved/changed?

Community engagement
- What groups are libraries engaging in their communities?
- What is the impact of this engagement on library usage?
- What is the impact of this engagement on library visibility and funding?
- What impact do services have on the community? In other words, what difference are library services making?

The group then considered some products that might be able to answer a portion of these questions:

- Gale: Analytics on Demand
- PolicyMap
- OrangeBoy: Savannah
- CIVICTechnologies: CommunityConnect
- QSR International: NVivo

After receiving demonstrations and quotes from each of the vendors, the group narrowed the list to two vendors/products, Gale (Analytics on Demand) and CIVICTechnologies (CommunityConnect).

The workgroup received in-person demonstrations from each of these two vendors. These recommendations are based on the culmination of all of the experiences described above, along with conversation among the committee about issues related to these products.

What we learned

We learned about market segmentation.

Market segmentation is an important component of both of the products under consideration. A commonly used marketing tool in the private sector, market segmentation divides larger groups of people into subsets that are likely to have common characteristics and needs. By identifying the market segments in a community and how they are using the library, this type of analysis can give libraries broad strokes about their communities that could help them plan services and collection.

Both of the analytics products considered provided market segmentation information, including detailed profiles of each segment in a community, giving the library valuable information without the library needing to develop this type of profiling on its own.

As the workgroup reviewed this segmentation in depth, some questions were raised about the value of this type of analysis for smaller communities. With smaller populations, market segmentation is less reliable. In addition, the makeup of a smaller community may be more easily determined without using a technique like market segmentation.

We learned about patron privacy and analytics products.

As we began to consider these two products in depth, the workgroup discussed potential issues related to patron privacy and Wisconsin library law. There are two points within the process that could be problematic:

1. *Access to patron data by a 3rd party*: In order to receive the analytics reports, libraries must upload patron circulation information by barcode and/or address to the vendor. The vendor may store that information so that multiple reports can be run on the data or they may only use the data once and discard it.

2. *Identification of individual households in reports*: The analytics reports provided by the vendors vary and, depending on the level of detail provided, particularly in maps, individual households can be identified as library users or as users of particular genres or formats.

Individual libraries or systems interpret Wisconsin library law about the use of patron data by a 3rd party for administration of the library differently, which is problematic when applying one product, statewide.

We learned that the analytics products have different approaches.

While both of these products provide libraries with information on demographics and market segmentation, they have very different approaches.

CIVICTechnologies CommunityConnect provides a platform for libraries to use to generate custom reports from their data. The data is uploaded to a server and remains there for as long as the library wants to use the platform. CIVICTechnologies provides extensive training and assistance to the library in

interpretation and use of the data. In fact, the demonstrations and proposal from CIVICTechnologies emphasized these training/planning sessions as a key part to using the product. They view their role as a partner to any library using their product, helping them navigate and understand the information they receive from the platform.

Gale Analytics on Demand provides a more "turnkey" approach, making it very simple for libraries to generate reports. Libraries upload their data only long enough for the reports to be created and, once that is complete, the data is discarded. Reports are not customizable and are provided in a variety of formats (PDF, XLS, etc.).   Some guidance is provided in the use of the reports, and libraries are expected to interpret and apply the results on their own.

Gale is working on a new product that will include the ability to run custom reports. It is unclear at this time if the data will then need to be stored with the vendor on a more long-term basis.

The workgroup felt that both products could have value for libraries or systems. Those interested in such a product would need to decide what approach they preferred.

We learned that we, as a community, have a lot to learn.

During the demonstrations the workgroup discussed the need for libraries to have a firm understanding of different types of data and how and when to use them in order to get the most value out of any analytics product they choose to use. There are also other sources of data available for libraries that should be considered alongside any analytics product a library chooses to use. The workgroup felt that providing a basis of understanding about data would be valuable to all libraries in the state as they begin applying data to their planning processes and service evaluation.

Recommendation:

Based on what we learned, the workgroup has made the following recommendation:

1. *Do not pursue a statewide analytics product purchase at this time*.
Given the patron privacy questions, the different approaches of the vendors, and the differing value to smaller communities, the workgroup felt that a statewide purchase is not the best approach for these products.

2. *Advise WiLS to continue to educate the community about these products and to provide group discounts.*
While there is not a "one size fits all" answer, the workgroup felt that there is value to these products for libraries and systems, and would like WiLS to provide discounts for group purchases of these two products.

3. *Encourage statewide training on data use in planning and service evaluation.*
The workgroup would recommend that WiLS, DPI, and other potential partners work together to develop training for libraries around the use and interpretation of data in planning and service evaluation.