SAY IT WITH DATA

A CONCISE GUIDE TO MAKING YOUR CASE AND GETTING RESULTS

PRISCILLE DANDO

Say It with Data

ALA Editions purchases fund advocacy, awareness, and accreditation programs for library professionals worldwide.

SAY
IT
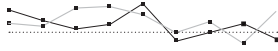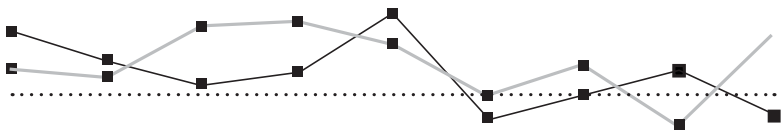# WITH
DATA

A CONCISE GUIDE TO MAKING YOUR CASE AND GETTING RESULTS

PRISCILLE DANDO

Priscille Dando is a library information services educational specialist supporting the secondary library programs of Fairfax County Public Schools, Virginia. Her twenty-three-year career as a teacher and librarian has focused on best practices for instruction and advocacy for teens. She is a National Board Certified Teacher in Library Media and was named Teacher of the Year at Robert E. Lee High School in 2003. Dando earned her master's degree in library science at the Catholic University of America and is a member of the Young Adult Library Services Association (YALSA) Board of Directors. She serves on several advisory boards, including the National Forum on Teens and Libraries hosted by YALSA and supported by the Institute of Museum and Library Services.

Contents

Preface

For years school and public libraries have been facing critical challenges of sustainability and growth just as the nation at large has. For individual frontline librarians, it's easier to consider advocacy efforts to be someone else's job, but everyone has to own the responsibility of advocacy. For library program managers, the consequences have become too large to ignore the need for a sustained advocacy campaign. Being a frontline advocate requires vision, a deep understanding of the workings of the library, and a plan of relationship building and communication. Too often, the task seems so daunting, or the human and time resources so limited, that any effort to conduct deliberate, persuasive communication keeps getting pushed to the background. That's no longer an option. To be successful, all librarians should be invested in an ongoing plan of positive communication with stakeholders and decision makers in order to wield positive influence. Administrators, policy makers, legislators, and the public demand concrete, measurable evidence of need and success in order to support the library's mission. Communication is the foundation of advocacy, and effective communication is customized to a specific audience and strategically focused on a desired outcome. The essential question is, "What will ensure the biggest return for my efforts?" The answer? Data.

Some people break out in figurative hives at the mention of statistics, but any advocacy effort will be unsuccessful without them. Data-driven decisions may seem cold and detached, but personally I find that weighing the story that evidence communicates is a fair and sound process for making decisions. Mary Alice Anderson, now an online instructor in the School of Education at the University

of Wisconsin–Stout, recalls how her diligence in recording usage statistics saved her middle school position as a media specialist. During a period when media specialists were being eliminated in her district, her principal was asked by the school board why he maintained staffing levels. He replied, "Five hundred kids a day, that's why."[1] Imagine a different outcome if Anderson hadn't kept and effectively communicated her data. While an emotional appeal is nearly always present in an advocacy campaign, it's the data, the evidence, that sparks a call for action. What humanizes it and makes it compelling is how it represents a story in context and creates a new understanding. The key is to tap into the story that numbers can tell. This book is intended to assist librarians and managers in school and public libraries in establishing communication through data as the heart of their advocacy strategy. Every librarian has a part to play in communicating an advocacy message; time invested in simple methods of communication will pay dividends.

I have found that a successful and influential communication plan includes four distinct elements:

1. A clearly defined objective paired with an understanding of target audiences
2. Compelling data at the heart of the message
3. Simple and arresting presentation of that data
4. Positive, persuasive communication techniques

These elements frame the basis of this book. And because integrity is critical throughout the process, I've also placed an emphasis on accuracy and validity in working with data and have advised on how to ensure both are present in your communication. I hope to reach not only those librarians who haven't had much experience in playing a role as an advocate for their programs but also those who are looking for a more systematic way to measure their success and communicate it effectively. I've taken a combination of research in the library, nonprofit, and business fields on these topics and

examined it through my own experience as a self-appointed advocate for libraries. While a number of factors are always in play when working to influence others, I have found that if I plan my efforts around data as the core of my rationale for my objective, the results are consistently successful.

Why Is Using Data the Key to Success?

The stakes are higher than ever before when it comes to preserving and growing the success of library programs. Funders and policy makers are under pressure to make data-driven decisions. Unsubstantiated appeals to save or increase programs, staffing, and resources are almost never successful. A strong argument based on real data, however, can provide the leverage needed for a serious consideration of your proposal. In other words, in order for your message to be effective, you need to say it with data.

The first benefit of a data-based communication effort is the authority that comes with factual evidence. Data that speaks to your point is difficult to refute. You've put the time and research into providing measurable evidence that supports your objective; anyone who objects has the burden of countering that evidence in some way. Being prepared with easily accessible data inherently lends greater authority to you and your message. You are projecting confidence and knowledge, which encourages others to respect what you have to say. With sound data, you have preempted the tricky questions that most stakeholders and policy makers privately or openly ask: "How do I know that what you believe is true?" and "Why is this important to me?"

The second advantage of a data-driven message is its ability to tell an authentic story through numbers. Some data, of course, is qualitative rather than numeric. Qualitative data includes examples, testimony, descriptions, observations, and anecdotal evidence—for example, the opinions gathered at focus groups or in answers to

open-ended survey questions. This kind of data is illustrative in a real-world sense, but presented alone it can be dismissed as evidence in isolation that does little to prove a trend or common experience. Pairing qualitative with quantitative data strengthens your message. Quantitative data is more along the lines of what we consider to be statistical and is most often expressed in numbers or percentages. Such data is often a measurement of some kind and can be used to identify trends, high and low values, or an overall count. And when you look at the numbers, alone or in combination with others, each one has a story behind it that is revealed by asking the question "Why?" It's a tricky thing to use statistics to determine the cause of something because there is rarely a simple answer. However, the process of digging deeper through the numbers can bring to light insights that speak volumes.

Here's a simple example. Suppose that, according to a tally of personal interactions at the information desk, the number of reference-related questions has been trending down sharply. This becomes a call to reduce staff because at first glance it seems as if fewer people are requiring assistance. The assumption is that patrons are taking advantage of search engines and other online resources and doing their own information retrieval. The library manager examining the bigger data picture sees, however, that the story behind the trend is more complicated. An analysis of usage data on all aspects of reference services shows a marked increase in e-mail and Twitter questions addressed to information desk staff. So the need for references services, rather than decreasing, has in fact shifted, as staff is required for answering reference questions not only in person but also virtually. While it would require additional research to determine if the availability of online reference help is the actual cause of the declining in-person interactions, the numbers justify the retention of library staff. If no data had been collected for online requests for assistance, this line of argument could not have been effectively deployed.

A third benefit of data-driven decision making, as we have just seen in the example of the reference desk, is that it can protect you against making incorrect assumptions. Under the influence of individual opinions and the "squeaky wheel" phenomenon, where you might feel obligated to a vocal minority, it's natural at times to take an assertion at face value and respond without determining if that assertion is accurate. If your advocacy campaign or communication plan is based on such an assertion, however, the objective could become skewed from reality, and ultimately, even successful advocacy efforts that meet the objective will miss the mark.

Here's a personal example. When I was a high school librarian, I worked with a large number of students who required individual help accessing information from one particular college-level database. These frequent interventions kept this database continuously on my radar, and I found myself recommending it to students with increasing frequency. I assumed the content must be helpful and that it was being used for assignments, but my evidence for this assumption was based only on my personal experiences with what seemed to be a large number of students. When it came time to look at my database subscriptions for the next year, I assumed renewing would be a no-brainer based on usage statistics, and in fact, I was primed to search for additional college-level databases because the demand for them seemed high. However, when I looked at the statistics provided by the vendor, I found that while there were a fair number of searches across that one database, the opening and downloading of articles was proportionately low. Checking on the statistics for other databases, I found that the majority of articles that were actually used were being obtained from solidly high school–level or easier databases. So while I was helping all those students with that one college-level database, even more students were using other databases independently, leaving me out of the loop. If I had requested increased funding for additional college-level resources, I would have been misguided. The moral of the story? Reliable, meaningful,

and comprehensive data ensures that the requests you make on behalf of your library are based on real needs.

In the library world, generating statistics is nothing new. Libraries must constantly collect data as a measure of progress toward specified goals, to help make budgetary decisions, and to meet the requirements of grants and of state or district reports. But now, more than ever before, it is equally vital that libraries also leverage their data to document the value of their services and instruction.[2] I hope this book will serve as a primer for librarians looking to collect, analyze, and present data as part of a strategy for successful library advocacy.

Notes

1. Mary Alice Anderson, message to the author, September 23, 2012.
2. Sandra Nelson, "Presenting Data," in *The PLA Reader for Public Library Directors and Managers*, ed. Kathleen M. Hughes (New York: Neal-Schuman, 2009), 205–6.

Acknowledgments

Thank you to editor Stephanie Zvirin and ALA Editions for this opportunity. I am forever grateful to Pam Holley, Linda Braun, Angela Carstensen, and Vicki Emery for all their encouragement. My deepest gratitude goes to my family—Lynette Calcaterra, Kevin Dando, and Ellen Dando—for their love and support.
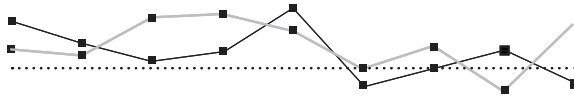
Determining Need, Message, and Audience

Positive, proactive communication through evidence-based advocacy is a necessity for successful library programs. Often the most challenging aspect of any advocacy effort is determining the plan of action. Evidence-based advocacy without a systematic plan is likely to come up short on results. The communication effort rests on the effectiveness of the data in driving a clear, concise, and compelling rationale that triggers a desired response from an audience of one or many. Careful and strategic planning increases the odds of success. This chapter covers the first four of six steps that are essential to a successful advocacy message based on data:

1. Analyze your program to determine what it needs.
2. Articulate the desired objective that satisfies these needs.
3. Identify the appropriate audience(s) to help you meet your objective.
4. Determine the evidence that will resonate with your audience and connect to your objective.
5. Collect, analyze, and synthesize data to act as evidence.
6. Package and deliver the data as the core of your message, tailoring the presentation for your target audience(s).

The time and effort invested into the front end of this process will be returned in the form of positive results. The worst thing you

can do is begin a communication effort without first systematically identifying its objectives and planning your strategy.

Analyze Your Program to Determine Its Needs

Because technology allows for collecting an enormous amount of statistical information, the temptation is to begin by reporting out all the readily available data. However, a look at the most effective advocacy efforts suggests that collecting data is one of the later steps in the process and that statistics must be reported strategically. Any strategy, of course, hinges on knowing what is needed and identifying a desired outcome to address it. Start the process by conducting a strength, weakness, opportunity, and threat (SWOT) analysis. What does the internal environment of your library program and the external environment of your public or school community look like?[1] Some questions to consider:

What are the assets of your program?

What areas need improvement?

How are most of your human and financial resources utilized?

What is an area of recent improvement or decline?

What avenues are open inside and outside the organization for positive growth?

What factors negatively influence the program?

Who are your avid supporters and detractors?

What is the priority of your parent organization?

How does your program compare with or differ from others nearby?

What positive and negative changes in your internal and external environment can you forecast for the near future?

This analysis is necessary as a way to crystallize your most pressing needs, and it cannot be done by a program manager in isolation. Determining which needs to target is crucial as it will drive all other steps in your communication plan. In some cases, creating a survey or focus group is an effective way to conduct the analysis and simultaneously gather some relevant data. (See chapters 4 and 5.) You might focus on the entire library program or on a single aspect, such as the use of technology. It's important to remember that this kind of advocacy is a continual process. There is no need to feel pressure to evaluate every aspect of your program and reach every audience all at once.[2] Determine a regular schedule for conducting the SWOT analysis. Waiting for a crisis before creating an advocacy plan is like searching for a flashlight when the power goes out only to find dead batteries. An ongoing advocacy program keeps policy makers informed, creates opportunities for building long-term positive relationships, and allows time for careful planning. Of course, unexpected developments will arise that force an immediate response. A lack of time is often a critical factor in these situations, and it limits the type of effective responses that are available.[3] What's most important is that the conclusions from any analysis be valid. They should be vetted by personnel inside the library program as well as by knowledgeable observers from outside.

The SWOT analysis may conclude that your library's needs are financial, policy related, or both. Financial issues can include budgets and funding for professional and paraprofessional personnel, programs, additional hours of operation, print and online resources, multimedia materials, equipment and equipment repair, professional development, support for special populations, furniture, renovation, marketing and outreach, hardware and software upgrades, and more. Nonfinancial needs may involve policy changes, reorganization, partnerships, operational guidelines, initiatives, and

directives from local, state, or federal government. You will need to evaluate the following areas specific to school and public libraries during your SWOT analysis:

Strengths or Weaknesses

Library staff
Organizational structure
Patron base
Support of community
Facility
Location
Technology
Print and online
 resources
Program offerings and
 services
Marketing or advocacy
 strategy
Online presence

Opportunities

Grants
Partnerships
Volunteer base
Community involvement
Business partners/
 sponsors
New initiatives
Strategic plan/School
 Improvement Plan

Threats

Budget cuts
New policy directives
Competing agencies
Increased costs
Bad publicity
New legislation

Determining needs may be a matter of deciding which ones are not only most pressing but also likely to have solutions that you as an advocate can adopt. In other words, the process of identifying needs goes hand-in-hand with identifying a course of action or an objective that will address them. Remember to borrow on the library's strengths and opportunities for leverage while considering how to counter weaknesses and threats.

Articulate the Desired Objective

Grant Wiggins and Jay McTighe's work *Understanding by Design* has been a mainstay education model for developing effective learning opportunities in classrooms. Its main philosophy is for teachers to develop essential questions for a lesson and determine the desired outcomes before planning or embarking on lesson activities. Just as a teacher focuses first on the desired learning outcomes, so should effective communicators develop the objectives that will best meet their needs before considering any action. This *backwards design* concept allows you to tailor activities to achieve specific goals rather than develop a plan without context. Looking at an objective, a successful advocate asks the tough "why?" and "so what?" questions at the forefront because that is ultimately what will need to be done in answer to any critics.[4] Knowing the audience is the key to anticipating the right questions. Look to chapter 2, "Secrets of Effective Communication," for suggestions on building influential relationships.

As an advocate, it's never enough simply to bring awareness to a problem. Most problems have more than one solution. It's the advocate's job to consider all possible solutions and create a plan of action for implementing the most desired one. Present the solution to the problem to the stakeholder or policy maker in such a way that there can be no doubt about what you are asking them to do. Otherwise, you may get your audience to agree that outdated technology in the library, for example, is a pressing need, but then leave them with no clear idea of what action to take to alleviate the problem. Complaining about an issue is usually counterproductive. Keep energy focused instead on the desired outcome. Make sure that each data-based communication effort has an objective beyond simply informing. Be ready to articulate a targeted purpose with a tangible outcome.[5] Whether the goal is increased funding or a change in policy, this objective drives all aspects of a successful and dynamic advocacy effort.

Identify the Appropriate Audience

Savvy advocates understand the need to connect personally with an audience. Mark Smiciklas, a marketing strategist specializing in new media, defines a potential audience as "anyone who is influenced by your organization's information."[6] The medium of communication can be online or in person, spoken or written, but it has to tap into the interests and point of view of the intended audience. There is no such thing as a canned message that fits all audiences. Individuals inside and outside of your immediate environment will have different self-interests, concerns, and levels of prior knowledge on your issue. To make a difference, target and understand a specific audience, then meet its needs. Do the homework. Charisma influences an audience, but it can only go so far.[7] You are in charge of the data that is shared and how it is presented, and one of your most important challenges is to make your case meaningful to your target audience. Lila Herndon Vizzard is a researcher and evaluator whose career has revolved around the use of data in the decision-making process in the areas of maternal and public health. She recommends looking at your message from the audience's point of view and adjusting it accordingly. "If you're presenting to funders (or potential funders), then you need to be prepared to speak to efficiencies and return on investment. If you're talking to beneficiaries of services, you need to focus on impact. You also need to understand the data literacy of your audience. It's all about the story and what the data has to say to that particular audience."[8]

The first audience to identify consists of the individuals above and below your chain of command. If you supervise employees, it's just as important to include them in the process as it is to convince policy makers to act in your favor. Not only do your immediate colleagues have valuable insights into the needs of the library program and how to address them, they are also critical to the process of planning and conducting your advocacy effort. Involve

stakeholders in the process from the beginning to encourage greater progress toward the objective and a greater commitment to data collection.[9] When thinking about your potential audiences, consider especially your supervisor's point of view and the perspective of that person's supervisor and so on, up to the ultimate authority over the organization. A branch manager, library director, principal, superintendent, library board, board of supervisors, or school board will require different approaches. Never forget to include your patrons—students, parents, PTA organizations, the public and surrounding community—as they will likely also require advocacy and communication efforts, and they each have a unique point of view. Remember, too, that there are many people who can speak on your behalf. Volunteers, program participants, students, book club members, parents, teachers, and regular visitors of all kinds have already demonstrated their interest in the library, and having them join you in your advocacy efforts can increase your authority with different audiences. And you can use Twitter, YouTube, Pinterest, Facebook, Tumblr, and other new media platforms to spread your message outside your library and, perhaps more importantly, to allow others to pass it on to an exponentially larger audience. Of course, you must prepare such messages in a way that makes it easy for supporters to promote them on their own. Providing compelling evidence in a clear and convincing way speaks to the audience and gets results. Look to chapter 2 for an exploration of how to connect with audiences.

Determine the Evidence

The most successful advocates provide a rationale for their request that goes beyond an emotional appeal. Presenting data gives authority to the speaker and substance to the request. Determining what evidence to collect can be a difficult decision because it involves a commitment of time and resources. The data should grab attention

by communicating something that hasn't been heard before. Context is key. A novel presentation of statistics in a real-life context is the best approach.[10] Maintain a presence among the decision makers and think of what this audience would respond to. Anticipate questions and include that information in your presentation. What does this or any targeted group already know about your issue and what do they need?[11] Be prepared to stress how the stakeholder will benefit and be sure to be cognizant of the relevancy and urgency of your message—above all, don't waste anyone's time.[12] The American Library Association suggests some helpful questions to consider when crafting your message:

> What does your target audience know and think about your library right now?
>
> What do they need to know to help you reach your library's goal?
>
> What are the best ways to communicate with them?[13]

A financial board would be interested in the costs of any endeavor and would be most moved by a demonstration of how your proposal will save funds. Proposals that involve additional or reallocated money should include evidence that costs incurred will result in a valuable return to the program. If the audience is the school principal, evidence should be presented that outlines how your proposal assists in meeting the school's mission or supports a new initiative, or how it positively impacts student achievement, since those are generally the top priorities of school administrators. Focusing more specifically on high-stakes tests, achievement gaps, budget concerns, parent interests, and school image will also tap into what school administrators value.[14] Realize, however, that everyone has a unique frame of reference when processing information and that this will affect your audience's reaction to any given message. So while it is okay to make certain assumptions about an audience's

interests and point of view, whenever possible test your message first to avoid misunderstandings.[15] Keeping the audience and objective at the forefront of the data collection process keeps the effort aligned for success.

A Simple Example

Suppose a SWOT analysis at a public library brings to light the large numbers of teens who arrive after school on weekdays. As a branch manager who sees both a threat and an opportunity, you need to determine the best way to respond. You decide that your objective will be to get special project funding for the creation of a designated teen space. Who are the people most invested in this issue, and who are the decision makers that can make your objective a reality? The likely audiences are all library staff, especially teen or youth services staff, teens that currently use the library and potential new users, the library director, the local Friends of the Library, and the library board. Perhaps grant providers and sponsors could be audiences, too. The message will be different for each audience, but once you've gained support from the other groups, the library board may be the ultimate audience and the group that will get things done. You could focus on the board's vision of providing dynamic services to special population groups, and your rationale should contain several data reference points and additional persuasive evidence. You could track the number of teens that come to the library on weekday afternoons over a specified period of time. If you also track the other groups of visitors, you'll have a much richer bank of information to report. Just giving the average number of teens visiting in a week may not spark much interest, but providing evidence that more teens come to the library between three and five on weekday afternoons than any other group of patrons has a better chance of grabbing attention. You may want to survey the teens themselves to see what they come to the library for, and how a designated teen

space might be utilized and received by them. Refer to studies and statistics that show that designated spaces better serve this group, and explore other systems with branches similar to yours to demonstrate the need, prevalence, and value of these spaces. Tap youth organizations in your community for potential partnerships or for further information about options for teens in after-school settings. Before you present any of this information to the board, make sure to consult any available official guidelines. In this case, you would turn to YALSA for their National Teen Space Guidelines (www.ala .org/yalsa/guidelines/teenspaces) to see what is recommended and realistic for your situation. Flesh out any other details, such as level of support in the community for your project, changes that would be needed to the current physical arrangement of the library, any associated costs, and an implementation plan. Finally, develop strategies for presenting your evidence in the format that is best suited to your audience and most likely to successfully make your case.

The final two steps in the advocacy process—collecting, analyzing, and synthesizing data, then presenting it effectively—are explored in detail in chapters 3–6. But first we will explore the secrets of effective communication (chapter 2).

Notes

1. Lesley S. J. Farmer, "Marketing Principles: School Libraries and Beyond," in *Marketing Your Library: Tips and Tools That Work*, ed. Carol Smallwood, Vera Gubnitskaia, and Kerol Harrod (Jefferson, NC: McFarland, 2012), 33.
2. Ibid.
3. Sandra Nelson, "Library Communication," in *The PLA Reader for Public Library Directors and Managers*, ed. Kathleen M. Hughes (New York: Neal-Schuman, 2009), 172.
4. Grant Wiggins and Jay McTighe, *Understanding by Design*, 2nd ed. (Alexandria, VA: Association for Supervision and Curriculum Development, 2005), Gale Virtual Reference Library e-book, chap. 1.

5. John T. Warren and Deanna L. Fassett, *Communication: A Critical/Cultural Introduction* (Los Angeles: SAGE, 2011), 11.

6. Mark Smiciklas, *The Power of Infographics: Using Pictures to Communicate and Connect with Your Audiences* (Indianapolis: Que, 2012), Kindle e-book, chap. 5.

7. Jo Reichertz, "Communicative Power Is Power over Identity," *Communications: The European Journal of Communication Research* 36 (June 2011): 149, Academic OneFile.

8. Lila Herndon Vizzard, e-mail message to author, October 22, 2012.

9. Ibid.

10. Rueben Bronee, "Writing That Counts: Three Ways to Use Numbers Creatively to Communicate," *ContentWise*, January 2009, www.becontentwise.com/Article.php?art_num=5109.

11. Sandra Nelson, "Presenting Data," in Hughes, *The PLA Reader*, 206.

12. Janice Gilmore-See, *Simply Indispensable: An Action Guide for School Librarians* (Santa Barbara, CA: Libraries Unlimited, 2010), 99.

13. American Library Association, "Target Audience Planning for All Frontline Advocacy Staff," accessed January 21, 2013, www.ala.org/advocacy/advleg/advocacyuniversity/frontline_advocacy/frontline_public/goingdeeper/audienceplanning.

14. Gilmore-See, *Simply Indispensable*, 54.

15. Nelson, "Library Communication," 168.

Index