TESTING PERFORMANCE MEASURES AND IDENTIFYING STRATEGIC PLANNING ISSUES FOR THE ALBERTA PUBLIC LIBRARY ELECTRONIC NETWORK (APLEN)

Implementation Plan Recommendations

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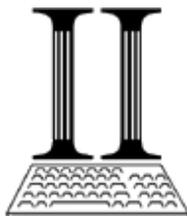Assistant Director
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APPENDIX

1. Introduction

1.1 Overview of Project

The Alberta Library (TAL) funded a project with the Florida State University (FSU) Information Use Management and Policy Institute to study and recommend electronic performance measures for the Alberta Public Library Electronic Network (APLEN), with the goal of developing, defining, and implementing a number of performance measures and quality standards that can be used to gauge the success of the APLEN.

In conjunction with the APLEN Evaluation Working Group (EWG) and numerous other contributors throughout, the FSU study team prepared and submitted four previous interim project reports to date: (1) Framework for Needs Assessment, January 14, 2000; (2) Needs Assessment Report, August 31, 2000; (3) Recommended Performance Measures, November 9, 2000; and (4) Recommended Performance Measures: Post Field Testing Revisions, June 28, 2001.

After preparing for the needs assessment in Phase I of this study, it was conducted in Phase II, and identified the then-present state of APLEN and the use of networked and electronic resources and services. Indeed, that assessment provided a variety of relevant facts about Alberta's public library operations and insights into the perceptions and preferences of key stakeholders. A number of performance measures were developed in Phase III complete with procedures and forms, and descriptions on how data for these measures can be obtained and analyzed.

The performance measures were then field tested and refined in Phase IV, with the FSU study team considering all feedback from the field test and incorporating it into the revisions. The FSU study team and the APLEN Field Test Subcommittee created a data collection design that works for both large and small libraries. In concluding this project with Phase V, the FSU study team has provided the following set of issues and recommendations pertinent to implementing those measures, continuing the performance measures evaluation process, development of a systematic training program, and the general development and evolution of strategic management.

Throughout the project the FSU study team worked closely with TAL and other key members of the APLEN EWG, especially Maureen Woods, Anne Carr-Wiggin, Hetty Wilderdijk, Bonnie Gray, Lucy Pana, Karen Howells, and Alvin Schrader. The benefit to the study as a whole from their constructive engagement has been very significant. This project also benefits from the substantial contributions of numerous others including, Pat Cavill and Karla Palichuk.

Today APLEN truly represents a major commitment by the Alberta Government and the public library community to provide high-speed Internet access for all citizens of

the province. This initiative has been one of many developed and/or administered by TAL to provide a range of innovative services and resources to improve Albertans' access to information, and to improve information services and resources available to Albertans no matter their circumstances or location.

The continued success of APLEN depends on a partnership among public libraries that have integrated provincial network objectives into their local technology plans and a commitment to APLEN goals. It is in the spirit of the past contributions and success experienced by those involved that we conclude our involvement with APLEN. We do so by reviewing the current performance measures that have been adopted, list some specifics to include in the development of staff training in the collection of performance measures training, consider some issues that may arise in the strategic planning process, and confirm the continued success APLEN can expect to experience with everyone working together.

1.2 Relevant Issues from the Needs Assessment

Of particular relevance to APLEN for future performance measures implementation and strategic planning are the various findings and issues raised in this project's needs assessment. Accordingly, we review those findings here.

The needs assessment found that the majority of public library staff support the use of performance measures regarding networked services, and demonstrated that such measures need to be widely applicable to communities of all sizes and regions across Alberta. Moreover, the measures must capture the public library issues that matter most to both local communities and the province, and benefit in a direct and unambiguous way those people in public libraries and library agencies who collect the data and are responsible for justifying tax dollar expenditures.

The data collected was analyzed to better understand and describe the:

- (a) Current and likely users, uses, and usefulness of networked resources and associated training;

- (b) Costs of such resources; and

- (c) Best policies to guide such resource adoption and implementation.

Among findings from surveys administered province wide is that many librarians and other key stakeholders throughout the province have a deep and abiding interest in achieving the goals of APLEN. This was evidenced through the response rate to the province-wide survey, and in the thoughtful comments, questions and suggestions articulated in a variety of site visits and group interviews. The same enthusiasm will be essential if APLEN is to continue and grow. Because measuring the current and future success of APLEN will require an ongoing system of collecting performance measures

The site visits, held after the province-wide survey, consisted of meetings with members of the library community, a focus group with trustees and interviews with elected officials. Among findings from these interviews is that:

- Librarians feel that they do not know enough about electronic resources and services and therefore do not really know where they need to go in terms of performance measures.

- Library staffs are generally not well trained in the area of statistics gathering, performance measures and their analysis.

- Statistics on the circulation of print materials and reference questions asked are beginning to decline, which is generally attributable to increased use of electronic resources. These virtual users of the library can come from anywhere, meaning that libraries no longer serve only their own citizens/ratepayers.

- The nature of staff interaction with library customers is becoming more complex and time-consuming in the electronic environment, and thus library staffs need to be better trained in the use of electronic resources in delivering services as well as in how to train customers in their use.

- Elected officials want to know more about non-taxpaying users. Are they a burden on the public purse, or are they contributing to the economic health of the community in other ways?

- Elected officials are aware that maintaining technology is expensive and are concerned that this does not happen at the expense of traditional services such as print materials and literacy programs. These officials appreciate that the Internet is a tool that the library uses to provide information to customers and that it does not replace traditional print-based services.

- Trustees, like politicians, are interested in how libraries are being used now, and in tracking changes in use by market segment over an extended period of time.

Although it may be time-consuming and expensive to collect, answers to these questions and issues are exactly what trustees and elected officials need in order to make effective decisions about library policy and future funding. Difficulty, time and cost notwithstanding, TAL and the public libraries of Alberta must make it a priority to find a way to provide this information, and do so effectively.

1.3 Overview of this Report

The following sections of this document conclude the FSU study team's role as a consultant for APLEN. We have raised a number of issues and concerns to be considered by APLEN participants in a near-term and ongoing basis, and have made some relevant recommendations. However, TAL and other APLEN stakeholders will plan and conduct

the actual implementation, training, and strategic planning which is the subject of this document.

In what follows we have covered performance measures implementation, listing the core and optional performance measures and how they should be used, and the importance of conducting performance measures evaluation. Our consulting team has considered performance measures training and recommended approaches and resources that may be useful in the development of training. We have reviewed some strategic management issues for APLEN to consider as it develops its new strategic plan and beyond. Lastly, we offer some specific recommendations and issues for next steps that APLEN may wish to consider.

2. Performance Measures Implementation

2.1 Generally

As Don Ford pointed out at the Alberta Library Conference 2000: "Today's libraries are more than just storehouses of information, they are vital, vibrant centers of the communities they serve...." Patrons depend on librarians to be "information navigators" who are able to guide them to information, demonstrate new ways to find it, and to help make the abundance of raw information meaningful to them (Ford, 2000, 7).

The overall nature of public libraries is indeed continuously changing. Libraries are now considered a 24-hour access point to information services where users obtain services and resources on *their* terms and when *they* want such services—oftentimes not coming to the library physically or interacting directly with library staff. The lack of reliable and accurate measures hinders the ability of library administrators to make good resource allocation decisions, meet user needs, and develop strategic plans for the development and operation of electronic services and resources.

This limited availability of valid and reliable performance measures and evaluation techniques has made it difficult for libraries and policymakers to obtain credible statistics, particularly regarding the networked environment. Yet if administrators are to maintain fiscal responsibility, compare costs associated with old and new means of service delivery, plan successfully for improvements with networked information, enhance the quality of services to networked users, or gauge the impact of electronic network and Internet-based initiatives, performances measures are essential.

2.2 Current Core and Optional Performance Measures

The measures presented here are the current performance measures that were field tested and adopted for APLEN. They are designed to help both local and library system boards identify the service trends and issues resulting from online and networked services at the community and regional level. Additional performance measures may and should be developed by APLEN as needs warrant. The data collected from performance measures will provide important feedback at the provincial and local level, but not necessarily to the same degree for any given measure.

The selected core performance measures (CPMs) work for both large and small libraries and require minimum input to obtain maximum output and are for province-wide implementation, whereas individual libraries may implement optional performance measures (OPMs) as circumstances warrant.

The following are the core performance measures and optional performance measures, in no particular order of importance:

CPM1	Customer in-library electronic resource sessions
CPM2	Customer satisfaction with electronic library services and resources
CPM3	Internet workstations per legal service population
CPM4	Electronic reference transactions per all reference transactions
CPM5	Virtual visits to library's website and catalog
CPM6	Number of public technology customer training sessions
CPM7	Number of database sessions conducted by users
OPM1	Network resources utilized by non-TAL members as a percentage of all users
OPM2	Number of Web pages viewed
OPM3	Staff training
OPM4	Reasons for Internet use by library customers

These measures were developed to assist APLEN in determining if it is meeting its objective to provide a range of network services. In order to analyze the performance of the library system and know the extent that APLEN is meeting this objective, it is important that the use of network services be quantified. An explanation of how these measures can determine performance and issues that are raised from their use follows.

CPM1—*Customer in-library electronic resource sessions*—will demonstrate the demand and popularity of electronic resources. It will help to identify the number of computers needed to meet client needs, and assist in showing the use of technology services compared with traditional services. A couple of issues raised with CPM1 is being able to determine electronic resource use among repeat and non-repeat users, and if primarily repeat users, what is the nature of the repetition. In addition, a session is the time allotted to patrons by individual libraries so comparison of the number of sessions between libraries on this measure is time dependent.

CPM2—*Customer satisfaction with electronic library services and resources*—aids in the process of improving services. The measure can assist in determining whether new services are desired by customers, and if more staff time should be allocated to meeting customer needs. Issues raised by this measure include the skill level of library staff to design computer surveys, and the costs of outsourcing data collection.

CPM3—*Internet workstations per legal service population*—is used to identify the extent that resources are allocated to network services. Funding agencies are able to use this measure as an indicator for more money for network resources. An issue raised by this measure is to determine if there are space and/or connection lines for new stations.

CPM4—*Electronic reference transactions per all reference transactions*—provides an indication of the changing library environment. While in the traditional library environment reference transactions are handled through non-electronic means, in the emerging environment transactions can be handled via email and the Internet. This measure will give trend data on how network services are being used, and can be used for future planning. At issue for this measure is that traditional reference services will begin to fluctuate with the introduction of new technology and Internet services. Also, a library should take care to count the number of questions and not the number of requests since one request can have multiple questions.

CPM5—*Virtual visits to library's website and catalog*—is used to track the number of people accessing the library's website and catalog from outside the physical library. The idea of network services is to expand a libraries reach, and this measure will provide information on how far that reach is. This measure will show how important and relevant library services are to the community even if physical visits numbers are down. An issue to consider here is that this measure requires a high degree of technical skills either from a library staff member or the library's website host. It is also important to make certain all visits to the library's website is counted, even if there is repeated access by one user.

CPM6—*Number of public technology customer training sessions*—provides an indication whether or not network services are being utilized to their full potential. Also, because the library is often the place to go and learn about the latest information technology, particularly in small communities, this measure will provide a way to improve and promote this role. At issue is the need to develop a training methodology and to identify user needs and skill levels, of both users and staff.

CPM7—*Number of database sessions conducted by users*—will produce a count of how often databases are used, allowing funding agencies to determine if more money should be allocated for additional database access. Issues to consider with this measure are the types of databases available to library customers, and an understanding of the databases used most by all libraries in the system.

OPM1—*Network resources utilized by non-TAL members as a percentage of all users*—will indicate the extent non-TAL member libraries are using TAL resources, and will assist promoting APLEN to non-members based on the number of non-member customers using the services. At issue here is the number of new visitors and repeat visitors using the resource.

OPM2—*Number of Web pages viewed*—will provide an indicator of the extensiveness of the use of content on the library's website. An issue to consider is the software packages being used and if they are practical and cost effective.

OPM3—*Staff training*—this measure will indicate the skill level of library staff in terms of their ability to use network resources. Libraries that have systematic training will experience greater success in the adoption and implementation of information

technologies. The measure will also help to identify knowledge centers among member libraries concerning particular skills. At issue is that this measure is only an account of whether a staff member received training during the year, future data collection may want to obtain a more detailed understanding of the skill levels that staff has acquired. Also, time for the necessary training must be made available.

OPM4—*Reasons for Internet use by library customers*—this measure will help libraries determine what their customers are interested in and allow them to tailor their services accordingly. The overall issue is to consider why customers come to the library, and which reasons are identified the most.

According to APLEN's Draft Strategic Plan, the continued success of APLEN depends on a partnership among public libraries, which have integrated the provincial network objectives into their local technology plans and have made an institutional commitment to the APLEN goals (APLEN Draft Strategic Plan Outline 2001-2003). This, together with the fact that funding organizations expect libraries to provide quality services and evidence that library programs are operating efficiently and effectively (Baker, 1990), makes it crucial that all library staff understand the role that data analysis has in decision making (Lovett, 1990). Moreover, data collection is an ongoing process, with targets being set for the upcoming year based upon both past performance and the annual plan for the library system (Lovett, 1990). Also, library directors will be able to use performance data from their libraries, and from comparable libraries, to support claims for additional resources to improve programs (Baker, 1990).

3. Performance Measures Training

Supporting electronic services requires an ever-changing set of skills, and while the basic mission of libraries and librarians may not have changed due to technology, it has added new dimensions to their mission (Youngman, 1999). For instance, acquisitions librarians must deal with access without ownership issues through the use of electronic databases; catalogers are creating multiple means of access; and reference librarians have to support a growing list of patrons using remote access via email and/or a linked web page. Yet in many libraries staff turnover is low which means hiring new personnel with new desired technological skills is not an option (Youngman, 1999).

A balance between change and stability is nevertheless desirable, and when hiring a new staff person is possible, consideration must be given to the new skills that are needed in the organization. However, not only is the opportunity to fill a new position a chance to re-think the organization, major transitions in an organization provide opportunities to create a systematic and purposeful training program as well.

Of the many areas that APLEN can develop training programs to assist in a changing environment, the training of staff in performance measures should be among the first developed. This training is necessary if administrators want to collect accurate and useful data. While it would be desirable perhaps to purchase a ready-made training package that focuses on collecting performance measure data for libraries, no such packages are known to exist. Even if such a package could be purchased it would still have to be tailored to the specific needs of APLEN.

The training needed for performance measures can be created by APLEN using the many resources the FSU study team found on the subject to create a sound training package that meets APLEN's needs. For instance, Levine (1990) developed a selective bibliography on library performance measures that covers a broad area from which performance measures training can be developed that is tied to the APLEN mission. Some of the items from Levine's list, along with other references that will assist in the development of performance measures training, can be found in Appendix A.

When developing a performance measures training package, attention must be paid to the information gap that exists among the various persons to receive the training, and the desired outcome. Training should also be done with the understanding that the idea of training is to bring about change and change brings with it certain fears. So any training package developed should be able to ease these fears, and to empower those being trained to use the knowledge gained to be able to begin collecting performance data when and as appropriate. In addition, as a result of the training received staff should be able to begin offering suggestions and insights on how to improve the data collection process, and changes that may need to be made in the type of performance data being collected.

Any training package developed for conducting performance measures should include:

- An explanation of what performance measures are.

- An explanation of how performance measures are linked to the strategic plan.

- How performance measures can and will be used.

For the last point, we suggest consulting and using the rationales and scripts for each measure incorporated into this project's Phase IV document ("Recommended Performance Measures: Post Field Testing Revisions").

In general terms, the goals of such training should include:

- An understanding by participants that performance measures are designed to provide objective data to assess the overall quality of system wide services, and are not designed to assess the quality of individual staff.

- An understanding that performance measure evaluation is a continual process and data must be collected on an appropriate timetable.

- An understanding that performance measures are not static, and that they are always evolving and will change as the conditions being measured change.

Finally, the development and delivery of training in Alberta public libraries is a role played well by the Regional Library System. The FSU study team recommends that they be actively involved in a systematic training program for APLEN performance measures. Such a training program should include a variety of training approaches for the different audiences, situations, and topics. It should also include a range of delivery methods—group training, CD-ROM, film, etc.—as appropriate.

4. Strategic Management

How effectively and efficiently a nonprofit organization meets the needs of its constituencies should be the measure of its success. In measuring that success organizations should use a multidimensional approach to gauge how well they are meeting those needs (Kaplan, 2001). Any initiatives developed or that already exist should assist the organization in achieving its strategic objectives, with the strategy and performance measures used focusing on what the organization intends to accomplish (Kaplan, 2001).

As APLEN finalizes its new strategic plan, we recommend they reflect on the reasons for developing a strategic plan—its purpose and objectives—and on how they intend to evaluate the goals and objectives identified in the plan. What follows are general comments about strategic plans, issues to consider, and comments on actions to be taken in the current strategic plan draft.

Migliore (1995) states that the development of a strategic plan involves the following steps:

- Defining an organization's purpose and reason for being;

- Analyzing environment opportunities and threats, assessing the organization's strengths and weaknesses, and making assumptions about future operating conditions;

- Prescribing written, specific, and measurable objectives in the principal result areas that contribute to the organization's purpose;

- Developing strategies on how to use available resources to meet objectives;

- Developing operational plans to meet objectives, including plans for all individuals in the organization; and

- Setting up control and evaluation procedures to determine if performance is keeping pace with attainment of objectives, and if it is consistent with the defined purpose.

According to Migliore (1995), *defining purpose* is probably the most important in developing a strategic plan, with the purpose statement representing the dream and vision of the organization. *Analysis and assumptions* is important because it is vital that the organization gauge the environment where it operates. *Establishing objectives* aims the whole organization at the same target. The objectives need to be clear, concise, statements outlining what is to be accomplished in priority areas over a period of time. *Strategy development* occurs in stages; strategy alternatives must first be developed with alternative courses of action evaluated before a commitment is made to a specific option. *Operational plans* are developed in all areas used to support the overall strategy; each one specifies what needs to happen in an area to implement the plan. *Evaluation and control* procedures are to appraise and control the plan, and are specified along with procedures for collecting and transmitting information.

4.1 Issues to Consider

While these steps are straightforward, it is important to understand that strategic planning is an ongoing process and that there are several issues that can arise at any point. We have identified a number of such strategic management and planning issues that may apply to APLEN and its organizational environment, now or in the foreseeable future (Kaplan, 2001; Youngman, 1999; Connecticut State Library, 1999; Bolt, 1998; Baughman & Curry 1997; Clement, 1995; Jacob, 1990; Compaine, 1988):

Organizational Issues

Attention to organizational issues is important because these issues are at the very core of the formation of the strategic plan. For instance, failure to recognize or address environmental and cultural changes or problems can lead to a collapse of the strategic plan being adopted by all members of the organization.

- An organization can be confused about which services are the most important to provide.
- There is difficulty in balancing quality services, customer satisfaction, staff satisfaction, and objectives with the financial objectives.
- Loss of local identity (particularly the smaller libraries).
- Failure to achieve a shared vision.
- The mission of the organization is not shared by or incorporated into individual libraries' missions and/or strategic plans.
- Environmental changes/problems encountered are not given significant attention.
- Are there cultural changes taking place? What is the nature of these changes? Are they positive or negative?
- How are budget changes affecting the organization?
- Does the strategic plan incorporate a system of continuous evaluation monthly, quarterly, annually?
- Does the strategic planning process take into account the support for education, both for traditional students and for adult learners?
- Is a balance between change and stability being maintained?

Evaluation Issues

Development of the strategic plan requires an investment of a great amount of time and dedication from the members of the organization. The identification of

evaluation issues during and after the development of the strategic plan is essential if the organization is to know whether the organization is meeting the goals and objectives of the plan, or if there needs to be additional goals and objectives adopted or current ones dropped due to changing conditions. For example, the organization's success certainly should be publicly celebrated and recognized, and the organization's strengths and weaknesses communicated among members.

- Does evaluation indicate movement in the desired direction and successes? If so, have proper recognition and celebratory steps been taken?

- Is there an indication of too much or too little success? If too much, is there any indication that the system is overworked and overtaxed? If too little, is the system underused and mostly idle?

- Are new goals being identified through evaluation and incorporated into the strategic planning process?

- Evaluation of visit counts fails to articulate that homes connected to the Internet do not necessarily need the resources of the local library, but may use the libraries access to databases.

- Are unmet needs being identified?

- Is the process identifying and communicating system strengths and weaknesses?

- Do all members receive added value from the relationship? How is that known?

- Is there equity of access both for members of the cooperative and patrons? For instance, has library services access improved for the underserved?   How is that known?

- Is the allocation of resources among traditional printed products and online electronic information services fluctuating according to need?

Staff Support Issues

Any success of the strategic plan will depend upon how well implementation of the plan takes into account the needs of organizational staff. As a whole, libraries are blessed to experience a low staff turnover rate. Therefore, it is crucial that the strategic plan include staff support as a key component. For instance, it is not just important to the organization that the training program supply the organization with needed skills, but it is also important to the staff that they are given the skills and ability to perform their jobs in a confident and competent manner.

- Does the staff training program support the treatment of staff as equal partners? And does the training program prepare the organization for needed skills?

- Adequate staff hours are maintained since technology based services usually increase, rather than decrease, the number of staff hours required to develop and maintain effective patron services.

- New staff hires consideration should be given to those who can bring critical new skills; it is a chance to rethink the organization and staffing patterns.

- Use creative supervision and training to develop solutions that can solve current problems and accommodate future changes.

Policy Issues

A variety of policy issues must be taken into consideration with constantly changing conditions or new legislative initiatives. It is vital that organizational policy be changed or new policy be adopted to fit the needs of the strategic plan and/or the changing environment. For example, a change in the regulation of technology may call for changes not only in policy but how the strategic plan addresses the use of technology and the evaluation of technology use.

- Policy is updated to address the balance between the right to privacy and the right to know?

- The degree to which policy regulating use does not anticipate that as technology changes regulation may need to change as well.

It is important that administrators have feedback on issues that impact their strategies (as well as their operational needs) since even a well-planned strategic objective, though developed and implemented using convincing data, may become inappropriate or invalid. Such feedback will give managers an opportunity to question current assumptions and to decide if they need to develop new strategic objectives to address the latest opportunities or threats that were not anticipated when the current strategic plan was written (Kaplan, 1996).

4.2 Comments on the Current APLEN Draft Strategic Plan Outline 2001–2003

Based on the FSU study team's review of the current APLEN Draft Strategic Plan Outline 2001-2003 (provided to the study team by email on June 28, 2001), we have provided comments and suggestions related to the recommended performance measures and to assessment generally.

4.2.1 The Need for an Evaluation Plan in the Strategic Plan

Almost all of the Plan of Action's individual items have statements regarding associated resources, responsible individuals or groups, the budget, and a deadline. Moreover, some of the action items specifically focus on assessing some aspect of the larger plan. While that reflects an intention to mark progress over the time period in question by the fulfillment (or not) of these items, an overarching plan of evaluation is not evident, however much it may be implied. To the extent that fulfilling action items for a given objective does in fact support achieving that objective, and all necessary action items have been anticipated for such an achievement, then completion of all action items would seem to lessen the need for evaluation. But unless the questions are asked and investigated, systematically, then the participants and those they report to will not know whether or to what extent that objective has been achieved.

Accordingly, the FSU study team recommends adding to the current Plan of Action draft an explicit, timely evaluation of: (a) whether or to what extent each action item has been accomplished; (b) whether or to what extent each objective has been achieved; and (c) whether or to what extent each goal has been achieved; so there can be (d) a systematic basis for assessing how well the APLEN mission is being fulfilled.

4.2.2 Integrating Recommended Performance Measures

Objective 3d, Item 4, of the Action Plan Outline within the APLEN Draft Strategic Plan Outline 2001-2003, contains the following statements, with a deadline of September 2001:

> Finish Performance Measures Project
> - Write the Manual
> - Form a group to receive and assess the Manual
> - Promote and implement performance measures

Following through on what remains of this project from the APLEN perspective, as agreed-upon by the EWG before and outlined above, is certainly necessary. Converting the Phase IV document (*Recommended Performance Measures: Post Field Testing Revisions*) into a manual deemed suitable for use in the wide range of Alberta public libraries—and then promoting and implementing it—in the next two months is indeed an extremely important step in the ongoing success of APLEN.

However, just as more short-term investment is necessary to reap near-future rewards from the substantial investment of time and money already made, more explicit planning is needed now in order to truly benefit from this project over the long-term. Consistent with the need for integrating a more explicit evaluation plan throughout the Action Plan Outline—and the Strategic Plan even more broadly—we strongly suggest

that the performance measures developed in this project be directly tied into the plan wherever feasible and meaningful.

For instance, it appears that in Objective 1a, the first two action items ("Maintain existing subscriptions" and "Evaluate content and use of subscriptions") lend themselves to being supported by one or more of the project's recommended performance measures. Indeed, the resources identified for those items ("Evaluation" and "End users' statistics, Financial Data, Nodes," respectively) seem to contemplate the use of such measures. However, it will be far more beneficial and easier to address the particulars of evaluation up front in the planning process, especially as the manual is being developed and implemented. Thus, we recommend explicitly considering CPMs 1, 2, and 7, and OPM2, as part of the decision-making process for evaluating whether to continue a given electronic subscription. These measures do not by themselves (individually or as a group) provide the answer in any particular case; however, they do provide important insights into the context, the general usage, what is valued, and what further questions may need to be explored.

4.2.3 Comments on Deadlines for Selected Objectives

The study team also noted that some action items have specific deadlines for completion that should instead be considered ongoing and therefore identified as such in the ultimate strategic plan. While it is desirable to place deadlines for the development of policy and procedures, other action steps should be considered a part of the continual evaluation process in measuring the organization's performance, and planned for accordingly. What follows is a list of the noted action statements.

- **Objective 1a row four:** Investigate implications of electronic databases on print collections. There will always be an issue of how electronic databases affect print collections.

- **Objective 1b row six:** Facilitate development of collaborative web content for libraries. Web content is in constant change therefore libraries will periodically need assistance with that change.

- **Objective 2b row three:** To identify the problems in achieving consistent catalog search results through TAL Online. Problems with search results will always exist and need to be addressed.

- **Objective 3b row 1:** Create training committee with a defined role. A well-developed system of training needs to be monitored and updated.

- **Objective 3b rows 2, 3 and 6:** Assess the training page and online materials and online registration; Evaluate existing training manual; and Assess what additional training needs to be done. These should not only be ongoing but should be evaluated annually.

- **Objective 3d row 4, item 3:** Promote and implement performance measures. The promotion of performance measures should be ongoing, and as conditions warrant new performance measures implemented.

- **Objective 4b row four:** Assess impact of new marketing campaign. Once the marketing campaign is adopted, the promotion should be ongoing and its impact assessed on at least an annual basis.

- **Objective 4c row three:** Determine public awareness of library services. The awareness by the public of library services should be an ongoing effort that is quantified at least annually.

5. Next Steps

The success of APLEN to date can be attributed to the hard work and spirit of cooperation that has been evident in all of its members. Overall, this project has demonstrated the importance of assessing library needs related to performance measures. By informing the broad library community of those needs and the types of measures that will be important to describe those needs and measure progress being made on those needs, and to report, effectively, to librarians and appropriate government officials how libraries contribute to the overall well-being of the province.

As this project is concluded there are a number of possible next steps and strategies that APLEN may wish to consider in terms of maintaining the momentum from the current project:

- **Review Province-wide Data Collection and Reporting**. Now that there is some agreement on a core and optional set of performance measures, an enhanced approach for regular and ongoing process to collect, analyze, and report that data may be needed. In short, a management information system that can maintain longitudinal data, conduct sophisticated analyses on the data, and provide customized reports to different audiences can extend the usefulness of the performance measure data.

- **Update Performance Measures**. As stressed throughout this project the networked environment is a rapidly changing context for the management and delivery of a range of resources and services. As the information technology changes so too may change the types of measures and approaches necessary to measure activities in the networked environment. There will be a need for an ongoing means to review and update the measures proposed during the project. This mechanism should be put in place at the earliest convenience of APLEN.

- **Integrate Performance Measures into the Strategic Plan**. As the strategic plan evolves there will also be a need to integrate existing and new performance measures into that plan. The current plan offers a broad range of proposed goals and activities. Indicators of the degree to which these goals and activities are accomplished successfully (via performance measures or other indicators) will better assist APLEN in demonstrating the importance of its services to others.

- **Promote Economic Development Activities**. A recent study completed by the FSU Information Institute found that public libraries in the state of Florida provided significant economic impacts that promoted and enhanced the economy in Florida (McClure, et. al., 2000). Few government officials, however, were aware of these contributions. APLEN may wish to develop specific strategies by which the network can assist local public libraries to better promote economic development throughout the province. Enhancing the role of public libraries in this area will increase both APLEN's and the library community's visibility and credibility in the province, and provide important benefits to the province as well.

- **Increase Awareness of APLEN**. The project has shown that APLEN has made significant strides in providing the people of Alberta with a network that provides significant benefits to its users. These "success stories" may need additional visibility and awareness for network users, the library community, and for local and province wide officials. The performance measures can assist in this effort. However, a more formalized strategy for increasing awareness of APLEN and its successes can pay dividends down the road to everyone involved.

- **Ongoing, Regular Program of Training**. The importance of training has been stressed throughout this project and its various reports. "One-shot" workshops, while useful, may not provide the depth and knowledge needed for library staff in an increasingly complicated network environment. While training is mentioned in the strategic plan in a number of different activities, it may be important enough to warrant its own goal, objectives, and activities. APLEN will need to collaborate with members and others to provide targeting training on specific topics that *best* meets member needs. Thus, *clearly defined* training goals and objectives will be necessary to provide an effective and ongoing training effort.

This list is not intended to be comprehensive. Rather it is suggestive of some key areas where APLEN may chose to maintain momentum from the current project.

An important result of the project has been to increase the visibility and awareness of ongoing evaluation of networked services in the province. APLEN's efforts to enhance the "culture of evaluation" are significant. Over the course of the project, it has become clear that the larger library community has: a better sense of why ongoing evaluation is important; and a better understand the uses and applications of the performance measures the study team proposed. However, perhaps most importantly, the project has demonstrated how to use these measures to both improve the network and to demonstrate accountability for the network services provided.

A formal strategy to build on the project can assist APLEN in building onto its benefits to date and to continue efforts to enhance the "culture of evaluation" that has been built, and continues to be developed. In the long term, the importance of province-wide networked services will only continue to grow. APLEN's role and importance in the development of Alberta and improving overall quality of life will also continue to grow as it expands networked services and evaluates how best to improve these services.

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