Performance Management and Monitoring

Key Performance Indicators (KPIs)

1. Arrangements for performance management and monitoring were detailed in the 24 July 2012 report to Cabinet, and the service's approach has continued in line with this.

2. As part of the Memorandum of Understanding, both SCC and the community partner sign up to a set of Key Performance Indicators (KPIs). These are discussed with each group before signing and are tailored for each one but have a core element which captures the same data for each CPL, allowing overall monitoring. KPIs include:

   - Book issues,
   - Stock,
   - Visits,
   - Number and profile of borrowers,
   - PC usage,
   - User satisfaction and feedback,
   - Income,
   - Training,
   - Activities and events,
   - Community engagement.
   - Equalities

3. SCC is also measured in the partnership against indicators including:

   - Training given,
   - Day to day support,
   - Delivery of underpinning support,
   - IT and property support.

4. There is also a requirement on both sides for regular meetings to discuss performance, more formal quarterly meetings and an annual review and report.

Experience of operating the KPIs

5. Pragmatic use of the KPIs over time has led to some simplification and identification of the most useful. Each CPL has developed its own pattern of meetings with the CPL team.

6. The most difficult problem which has arisen in making these meetings useful is provision of monthly data against a very tight timescale, and dates of meetings have had to be adjusted to fit in better with data collection but there is more work to be done on this.

Themes arising from KPI discussions

7. The aim of these meetings is to jointly look at how the library is performing, identify problems which can be tackled and take action on them. Successes and improvements are noted and plans for the future discussed.

8. A number of common themes in monitoring discussions have arisen in the first months of operation:

   a) *Set up issues:* Partners flagged up a number of problems with telephones, the CPL help line and link libraries which have been improved. Delays in delivery of new signage has been an issue, as has building repairs and how building works have been carried out, which the support team have pursued. There have been discussions about the role and performance of the support team and what financial and technical support can be obtained for development plans and improvements.

   b) *Provision of data:* As noted above work needs to continue on providing timely and clear data.

   c) *Income generating:* Discussions around income generation to support future investment in the library, including the legal position and how best to manage and promote room hire, have been prominent.

   d) *Volunteer roles:* For effective management and inclusive volunteering, many of the groups have developed a wide range of roles for volunteers, both "lead" roles (e.g. taking charge of building problems) and a wide range of supporting roles as well as face to face contact with the public.

   e) *Children and young people:* Taking on board the steering groups' strongest concerns - to engage with children and young people, and to see real increases in use of their libraries - trends in use and how to engage with different sectors have also been a major focus.

CPL User Surveys 2013

9. User consultation, which is on-going, has comprised two surveys – paper and on-line – at each CPL. One survey is conducted while the library remains a Surrey County Council managed community library[1], and a second is conducted once the library is operating as a CPL. Five libraries – Byfleet, New Haw, Stoneleigh, Tattenhams and Virginia Water- have completed the process whilst two libraries – Ewell Court and Warlingham - have conducted the first set of surveys.

10. The paper survey is conducted as a census-style survey whereby all users, including children, are invited to complete a questionnaire during their library visit. The on-line survey took the form of a questionnaire, sent with an e-mail to adult members of the CPLs, who had given their e-mail addresses and agreed to be contacted for marketing purposes. Potential respondents had two weeks to complete and submit electronically the completed questionnaire.

Survey Findings

11. Analysis of the surveys is ongoing. Initial findings are very consistent between the two sets of surveys, which suggest that standards and the service offer for the council's CPLs have been maintained at the service points that have moved to the community model. The key findings from these surveys include:

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[1] Known as a 'Group C' library, within the council's three tier service offer

- Libraries are still synonymous with books in the minds of the public as book borrowing is overwhelmingly the most popular activity; followed in popularity by browsing, often an ancillary of borrowing.

- There are some indications that libraries are becoming more community-focused with a percentage increase in the proportion of 'Very Good/Good' ratings given to the library as a place to socialise

- Fifteen performance-indicator questions show that in the majority of instances there is very little difference in the percentage of respondents assigning 'Very Good/Good' ratings to aspects of service provision between SCC managed community libraries and CPLs

- The standard of customer care established when service points were Group C Libraries has continued after libraries have become community partnered, according to the on-going analysis of survey findings. Percentage differentials between the former and the latter being 1.8% or lower for Very Good/Good ratings for staff friendliness and staff helpfulness.

- Positive responses to improvements are apparent; such as the greater level of satisfaction with hours of opening at Byfleet Library where opening hours have increased and changed with a weekly schedule that now includes evening and Sunday opening

- Lifestyle questions relating to book purchase and personal computer/smart phone ownership have produced similar responses in surveys before and after becoming community partnered.

- The demographics continue to show a relatively elderly user base, a two to one ratio and over, of females to males and an ethnic background that is predominantly White British.

Respondents comments

12. In both surveys, customers were invited to make open comments. The main themes arising from these comments, as well as a selection of comments are detailed below.

Survey 1 – Libraries when they were being managed by Surrey Council[2]

13. The main themes arising were:

- The importance of the library to the community, and particularly for children and the elderly.
- The value of the Library Service's paid staff and their expertise and helpfulness, with concerns that volunteers will not be able to provide the same level of support and expertise.
- The value of the range of services provided e.g. Rhymetimes, information provision, computers, photocopiers, social events and talks etc.
- Wanting to see extended and more consistent opening hours.
- Wanting a wider variety of stock and more frequent rotation.
- Wanting more facilities - computer access, more places for quiet study or reading and refreshments.
- Wanting the library to have greater investment.

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[2] Comments included from online surveys at Byfleet, New Haw, Stoneleigh, Tattenhams and Virginia Water, and paper surveys at Byfleet, Stoneleigh and Virginia Water. Ewell Court and Warlingham Libraries have to date conducted the first set of surveys only, and are therefore not included in this report. Analysis ongoing.

- The value of having the library within walking distance for many.
- Opposition to closure or perceived downgrading of the library.
- Opposition to self-service, on the basis that it provides a less personal service, and experiences of having to queue to use the self-service kiosks, though equally some comments that self-service works well

It would be a great loss to the village if it were closed

It's a wonderful part of our community! Our children love the experience of using and looking after books from the library!

Much used and a valuable asset to the community

A lovely place to look at books and meet other like-minded people

It would be helpful if the library was open later in the evening so I could go after work

Open more days and more evenings

We are not happy about the machines used to help us borrow books – a friendly face is so much nicer for children and the elderly.

Survey 2 – Libraries now they are operating as CPLs[3]

14. The main themes arising were:

- Pleased that the library is staying open.
- Importance of the library to the community, particularly children and older people.
- Well organised, attractive and books are easy to find.
- Friendly and welcoming atmosphere.
- Value of having meeting facilities for local residents.
- Pleased with improvements to opening hours at Byfleet, though some comments that they would like more opening hours, and consistent each day.
- Wanting more opening hours and more convenient opening hours at Tattenhams and Stoneleigh.
- Wanting more audiobooks and wider selection of stock.
- Wanting more investment in the library, specifically more scanners and computers, toilet facilities, tea/coffee facilities etc.
- The value of the library as a place for socialising for many, though also comments that the library is too noisy and should be a place for peace and quiet.
- Feeling that some of the volunteers could benefit from more training on using the computers, so that they are more able to help customers without needing to refer to a colleague or link library.
- Disappointment at losing access to the library management system, and opposition to self-service, on the basis of it providing a less personal service. Also some comments that another kiosk needed for busy times.
- Perception among some customers that they are no longer able to check their borrowing history
- Praise for the volunteers, but regret at the loss of paid staff and their depth of knowledge – a couple of respondents said they have not used the library since it became a CPL, because they oppose the policy in principle. In addition, some

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[3] Comments taken from paper and online surveys at Byfleet and Stoneleigh, and online surveys at New Haw, Virginia Water and Tattenhams. Analysis of the remaining surveys is ongoing.

respondents miss the relationships with staff that had built up over many years and who therefore were able to provide a very personal service.

15. Two comments in the user surveys noted disappointment at being unable to access their borrowing history from the self-service terminals. Borrower history is not a function on the self-service kiosks at present. In a branch library, a customer can access their borrower history over the past six months by asking a member of staff to access the library management system. Whilst this is not possible in CPLs, the information can be accessed online by the customer or with assistance from a volunteer or through a phone call to Enquiries Direct. This provides a year of reading history for that borrower.

A vital resource for the village. The friends and volunteers, who give their time so freely, do a brilliant job

The Sunday opening has been a real boon

Longer opening hours would make it easier to use

Encouraged by new books in the library. Seems to be working well

The library is run very efficiently by volunteers – they are professional in their services and so friendly and helpful

A good meeting place for villagers and we can meet up with local councillors on a casual basis

The volunteers have been innovative in introducing new services and activities

I was very anxious as to what the recent changes would mean, but so far, as a library user, everything appears to be going well

More people to ask things since it went voluntary

Visits and Issues

Context:

16. The six existing community partnered libraries came on stream in stages starting with Byfleet in September 2012. To demonstrate the change in use of all existing CPLs, the figures shown are based on the seven months (February to August) since the latest CPL opened. For comparison the same seven months were used for 2011 and 2012.

17. The first six CPLs to launch were:

- Byfleet September 2012
- New Haw October 2012
- Tattenhams November 2012
- Virginia Water January 2013
- Warlingham January 2013
- Stoneleigh February 2013

Visits:

18. Visits data shows significant variation over the course of each of the three years. Visits for February to August 2012 were 7% lower than in 2011. For the same period in 2013, visits were 2% higher than in 2012. Most recently for the month of August 2013, visits were 20% higher than in August 2012. The library service attributes this increase to the efforts made by the CPL volunteers to encourage use of their library by a wider spectrum of the community.

Visits at CP Libraries 2011-2013 (based on 6 current CPLs)
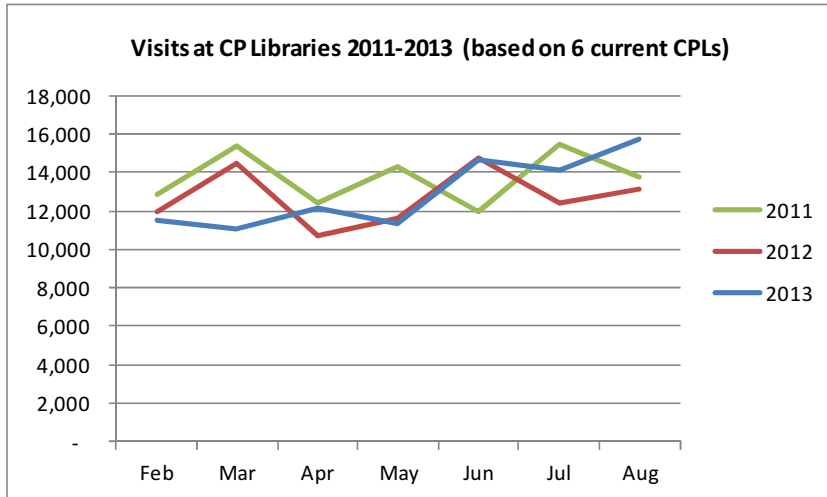
19. CIPFA data shows that visits to libraries for library purposes in England and Wales fell by 3% between the financial year 2010/11 and 2011/12. For Surrey, visits fell by 1%.This demonstrates that visits to Surrey libraries with combined provision of SCC managed libraries and community partnered libraries is outperforming the national trend.

Issues:

20. Issues have declined year-on-year; low and declining use was one of the reasons why the 10 libraries were put forward for community partnership. It should also be considered that CPLs usually close for a period before launch for training, and some were also closed for refurbishment work. This will have adversely affected the final issues and visits statistics. Equally, usage in many of the designated CPLs saw an upsurge from 2011 following the publicity surrounding the Public Value Review, and therefore figures for 2011 do not in all instances represent what the service would expect from a 'typical' year.

Book issues at CP Libraries 2011-2013 (based on 6 current CPLs)
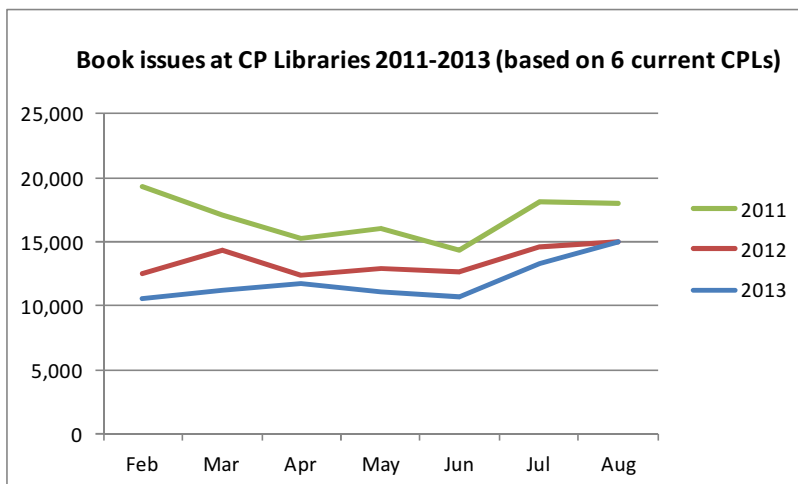
21. Issues for February to August 2012 were 20% lower than in 2011. The level of decline has slowed in 2013, with issues 11% lower than in 2012. August 2013's book issues were slightly higher than in August 2012. The library service attributes the signs of upturn to the hard work and enterprise of the CPL steering groups and volunteers who are working hard to increase the use of their libraries.

22. The latest available CIPFA data showed that book issues for England and Wales fell by 4% between the financial year 2010/11 and 2011/12. During the same period of time, issues fell by 1% for Surrey. National results for 2012/13 should be available in December/January and for this year, Surrey's book issues fell by 1%. These figures indicate that Surrey's libraries are out performing against the national trend.

Current members

23. On average, the established CPLs have seen a 2% decrease in the number of current members[4] since each library became a CPL[5]. This compares to a 1% decrease across the library network as a whole, over the same period (September 2012 to July 2013).

24. There is a notable success at Virginia Water, which became a CPL in January 2013, where there has been a 7.2% increase in membership from under 16s. This is likely to be due to successfully promoting the Summer Reading Challenge, as well as Rhymetimes and Storytimes. Stoneleigh has also seen a 1% increase in the number of current members over this time.

General comments and complaints received by the Library Service

25. There has been one complaint about noise levels in CPLs as well as a couple of comments in comment books.

26. Some of this increased noise is likely to be down to volunteers needing to confer with their team more while they are learning. Some is also likely to be related to the greater focus on the library as a social space.

27. Recognising that this is a legitimate issue for some customers, it can also be regarded as a measure of success, showing the enthusiasm and excitement the libraries are generating.

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[4] Defined as a borrower who has been 'seen' by the library management system in the past 2 years
[5] This is calculated based on the number of months each CPL has been in operation, starting from September 2012, to the month ending July 2013.

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