

SUFFOLK  
LIBRARIES

WHERE  
I BELONG

# IMPACT AND ENGAGEMENT TOOLKIT

UNDERSTANDING YOUR AUDIENCES AND  
HOW YOUR SERVICES CREATE POSITIVE CHANGE



PRODUCED BY  
 the audience agency

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## INTRODUCTION

In 2022-23, Suffolk Libraries commissioned The Audience Agency to undertake a research study to support them in developing a deeper understanding of who is engaging with their offer and services, and how, and who is not, and the reasons for non-engagement.

As a legacy for the research, this monitoring and evaluation toolkit has been designed to support a consistent and embedded approach to ongoing data collection. This will, in turn, support engagement monitoring and the development of actionable insights for the Suffolk Libraries team. The toolkit also considers approaches to deeper impact assessments across a range of criteria, referencing models which may be applied in different contexts as relevant to Suffolk Libraries' strategic objectives.

In addition to drawing on existing tools, to deliver benchmarkable insights across a range of activities and audiences, the toolkit aims to set out approaches that are both meaningful and practical within a library context. As such, it may be used to inform the development of a consistent approach to engagement monitoring and impact evaluation across the wider library sector.

### WHY IS THIS TOOLKIT NEEDED?

The findings from the 2022 Understanding Audiences research and analysis have delivered a picture of current library user engagement for Suffolk Libraries. The project has also identified the need for more consistent and comprehensive data collection across areas of activity that are not consistently evidenced in the way that, for example, data regarding book circulation is captured.

This is a picture commonly seen within the library sector, where the data collected (and the drivers, skills, and support for data collection) are inconsistent and patchy across different services and areas of service delivery.

Key areas that the toolkit is designed to address are<sup>1</sup>:

- There are currently limited standardised approaches for library engagement research and data collection, which limits the potential for tracking the impact of service offer changes and development strategies at service area, regional, and national levels.

- Linked to this, and the siloed nature of data collection and research across different areas of activity, there is little facility for evidencing and presenting an overall, holistic, picture of the impacts of engagement within the library service. This impacts on advocacy and demonstration of value for external and internal stakeholders.
- Data and evidence collected is not consistently linked with strategic objectives – meaning the findings are not always actionable or useful for the library teams.

### SOURCES AND MODELS REFERENCED AND USED IN THE DEVELOPMENT OF THE TOOLKIT

- 2022 Understanding audiences research for Suffolk Libraries – The Audience Agency
- [Audience Finder Data Tools](#)
- [DCMS 7 Outcomes Libraries Deliver](#)
- [Warwick-Edinburgh Mental Wellbeing Scale](#)
- [Guidance and Standards - Social Value UK](#)
- Moore Kingston Smith research for Suffolk Libraries
- HM Treasury's [Green Book](#)
- [Economic contribution of libraries - evidence review for Arts Council England](#)
- [Julie's Bicycle Creative Climate Tools](#)
- [Market Research Society code of conduct](#)
- [Evaluation Principles](#) - Centre for Cultural Value

<sup>1</sup>Note that areas of activity currently well documented through existing library systems – such as book borrowing – are not covered by this toolkit.

**WHY IS MONITORING AND IMPACT ASSESSMENT IMPORTANT FOR LIBRARY SERVICES?**

There are 5 key areas where collecting information from the people who use your services will help to ensure that your offer remains relevant and resilient:

INFORMED DECISION MAKING	PEOPLE CENTRED OFFER DEVELOPMENT	ADVOCACY	SHARED LEARNING	EFFECTIVE USE OF RESOURCES
<ul style="list-style-type: none"> <li>▪ Identify who is and isn't engaging with the service to inform strategic development</li> <li>▪ Use data to identify patterns of service use and engagement and inform long-term planning</li> </ul>	<ul style="list-style-type: none"> <li>▪ Understand the needs of those you serve in order to develop relevant offers</li> <li>▪ Monitor the extent to which your reach is equitable within the communities you serve</li> <li>▪ Understand how your service is perceived and understood</li> <li>▪ Address barriers to inclusion and access</li> </ul>	<ul style="list-style-type: none"> <li>▪ Evidence your value to stakeholders</li> <li>▪ Cultivate effective partnerships</li> <li>▪ Inform funding bids</li> <li>▪ Share your story</li> <li>▪ Celebrate your successes</li> </ul>	<ul style="list-style-type: none"> <li>▪ Cross-team understanding of development priorities</li> <li>▪ Learn from experience and apply learning to future developments</li> <li>▪ Review and reflection on data insights built into business as usual</li> </ul>	<ul style="list-style-type: none"> <li>▪ Targeted development to meet needs of priority audiences</li> <li>▪ Monitor the impacts of new developments and make changes as needed to ensure their success</li> </ul>

## ENGAGEMENT MONITORING AND IMPACT EVALUATION TOOLKIT

The toolkit is arranged thematically by topic of investigation within two distinct areas: **Engagement monitoring** and **Impact evaluation**. Engagement monitoring data will inform understanding of who engages with the library offer and how, whilst Impact evaluation data will evidence the impacts of library engagement across a range of metrics both personal and societal; these include social, economic, and environmental considerations.

A set of tools is attached to each topic, along with practical guidance for how and when they might be used, and a rationale setting out how the data collected may be analysed and benchmarked etc. Further practical information on the use of different methodologies for data collection may be found in the Impact monitoring and evaluation overview section of this document.

The topic areas covered by the toolkit are:

**ENGAGEMENT MONITORING**

1. Demographics and geography
2. Library relationship
3. Sites and in-person service use
4. In-person participation – events and activities
5. Digital service use and access
6. Digital participation – events and activities
7. Monitoring social and wellbeing outcomes

**IMPACT EVALUATION**

1. Wellbeing and social impacts
2. Economic impacts
3. Sustainability and environment

# ENGAGEMENT MONITORING

The following tools will support ongoing monitoring of engagement with the Suffolk Library services. It should be noted that this applies to data collection from people aged 16+ only; considerations of evaluation data collection from under 16s are included in the Impact monitoring and evaluation overview section of this document.

Unshaded questions are those which are likely to form part of a core question set for ongoing monitoring, and therefore collected consistently from library service users and programme attendees.

Those shaded in grey are more likely useful for individual event data collection or as part of a periodic (e.g. annual) programme of research to assess long-term changes in patterns of service use as a result of any service provision developments etc.

## 1. DEMOGRAPHICS AND GEOGRAPHY

Asking these questions will evidence the extent to which the people you engage with are representative of the area you serve, and help identify where action might be needed to support engagement with underrepresented groups.

DATA REQUIRED	QUESTION TEMPLATE(S)	RATIONALE / BENCHMARKING	DATA COLLECTION METHODOLOGY
Age	<p><b>A. What is your date of birth?</b> [open response]</p> <p>Category selection:</p> <p><b>B. What is your age?</b></p> <p>Under 16 / 16 - 19 / 20 - 24 / 25 - 29 / 30 - 34 / 35 - 39 / 40 - 44 / 45 - 49 / 50 - 54 / 55 - 59 / 60 - 64 / 65 - 69 / 70 - 74 / 75 - 79 / 80 - 84 / 85 or older / Prefer not to say</p>	<p><b>A.</b> Date of birth is currently collected as part of your existing process</p> <p><b>B.</b> Categories based on Census data collection - supports benchmarking against population and other national datasets</p> <p>For analysis the data can be grouped according to Suffolk Libraries' own planning model if needed</p>	<p><b>Members:</b> Collected at point of joining</p> <ul style="list-style-type: none"> <li>Survey / form</li> <li>LMS</li> </ul> <p><b>Non-member library users:</b> Collected at point of service use / attendance</p> <ul style="list-style-type: none"> <li>Survey</li> </ul>
Gender	<p><b>A. Which of the following options best describes how you think of your gender identity?</b></p> <p>Female / Male / In another way / Prefer not to say</p> <p><i>(If in another way) How would you describe your gender?</i></p> <p><b>B. What is your sex?</b></p> <p>Female / Male / Prefer not to say</p>	<p><b>A.</b> is a social model question and has been developed in consultation with Stonewall to support inclusive research practice</p> <p><b>B.</b> is a medical model question and aligns with Census data benchmarking</p>	<p><b>Members:</b> Collected at point of joining</p> <ul style="list-style-type: none"> <li>Survey / form</li> <li>LMS</li> </ul> <p><b>Non-member library users:</b> Collected at point of service use / attendance</p> <ul style="list-style-type: none"> <li>Survey</li> </ul>
Ethnicity	<p><b>What is your ethnic group?</b></p> <p><b>Asian or Asian British</b> Bangladeshi / Chinese / Indian / Pakistani / Any other Asian background [followed by "What other Asian or Asian British background?"]</p>	<p>Categories based on 2021 Census data collection - supports benchmarking against population and other national datasets</p>	<p><b>Members:</b> Collected at point of joining</p> <ul style="list-style-type: none"> <li>Survey / form</li> <li>LMS</li> </ul> <p><b>Non-member library users:</b> Collected at point of service use / attendance</p> <ul style="list-style-type: none"> <li>Survey</li> </ul>

DATA REQUIRED	QUESTION TEMPLATE(S)	RATIONALE / BENCHMARKING	DATA COLLECTION METHODOLOGY
	<p><b>Black, Black British, Caribbean or African</b> Caribbean / African background [followed by “<i>What African background?</i>”] / Any other Black, Black British, or Caribbean background [followed by “<i>What other Black, Black British, or Caribbean background?</i>”]</p> <p><b>Mixed or multiple ethnic groups</b> White and Asian / White and Black African / White and Black Caribbean / Any other Mixed or Multiple background [followed by “<i>What other Mixed or Multiple background?</i>”]</p> <p><b>White</b> English, Welsh, Scottish, Northern Irish or British / Irish / Gypsy or Irish Traveller / Roma / Any other White background [followed by “<i>What other White background?</i>”]</p> <p><b>Other ethnic group</b> Arab / Any other ethnic group [followed by “<i>What other background?</i>”]</p> <p><b>Prefer not to say</b></p>		
<b>Disability</b>	<p><b>A. Do you identify as a D/deaf or disabled person, or have a long-term health condition?</b> Yes / No / Prefer not to say</p> <p><b>B1. Do you have any physical or mental health conditions or illnesses lasting or expected to last 12 months or more?</b> Yes / No / Prefer not to say</p> <p><b>B2. Do any of your conditions or illnesses reduce your ability to carry out day-to-day activities?</b> Yes, a lot / Yes, a little / Not at all / Prefer not to say</p>	<p><b>A.</b> has been designed by Arts Council England in collaboration with various interested parties to align with a social model of disability</p> <p><b>B.</b> is a medical model and aligns with 2021 Census data</p>	<p><b>Members:</b> Collected at point of joining</p> <ul style="list-style-type: none"> <li>▪ Survey / form</li> <li>▪ LMS</li> </ul> <p><b>Non-member library users:</b> Collected at point of service use / attendance</p> <ul style="list-style-type: none"> <li>▪ Survey</li> </ul>
<b>Geography</b>	<p><b>Do you live in the UK?</b> Yes / No</p> <p><b>If yes, what is your full postcode?</b></p> <p><b>If you live overseas, what is your country of residence?</b></p>	<p>Postcode data can be used to map distance travelled and also profiling by Mosaic or Audience Spectrum segmentations</p>	<p><b>Members:</b> Collected at point of joining</p> <ul style="list-style-type: none"> <li>▪ Survey / form</li> <li>▪ LMS</li> <li>▪ Ticket booking system</li> </ul> <p><b>Non-member library users:</b> Collected at point of service use / attendance</p> <ul style="list-style-type: none"> <li>▪ Survey</li> <li>▪ Ticket booking system</li> </ul>

## 2. LIBRARY RELATIONSHIP

Asking these questions will generate insights into the extent to which your services users are also members, short and long-term library use, awareness and routes to discovery, and levels of potential advocacy for the service

DATA REQUIRED	QUESTION TEMPLATE(S)	RATIONALE / BENCHMARKING	DATA COLLECTION METHODOLOGY
<b>Member / non-member</b>	<p><b><i>Are you a Suffolk Libraries member?</i></b></p> <p>Yes</p> <p>No</p>	<p>Supports understanding of relative levels of library use by members and non-members</p> <p>May be further analysed to assess member/non-member engagement levels with different services / activities to inform membership development strategies etc</p>	<p><b>Members:</b> Collected at point of joining</p> <ul style="list-style-type: none"> <li>▪ Survey / form</li> <li>▪ LMS</li> </ul> <p><b>Non-member library users:</b> Collected at point of service use / attendance</p> <ul style="list-style-type: none"> <li>▪ Survey</li> <li>▪ Ticket booking system</li> </ul>
<b>Longevity of use</b>	<p><b><i>How long have you used Suffolk Libraries services for?</i></b></p> <ul style="list-style-type: none"> <li>▪ Less than a year</li> <li>▪ Between one and two years</li> <li>▪ Between two and three years</li> <li>▪ Between three and five years</li> <li>▪ Between five and ten years</li> <li>▪ Over ten years</li> <li>▪ Not sure</li> </ul>	<p>Useful for understanding patterns of library use which may inform decision making around service development etc</p>	<p><b>Members:</b> Collected at point of joining</p> <ul style="list-style-type: none"> <li>▪ Survey / form</li> <li>▪ LMS</li> </ul> <p><b>Non-member library users:</b> Collected at point of service use / attendance</p> <ul style="list-style-type: none"> <li>▪ Survey</li> </ul>
<b>Discovery &amp; awareness - how / where heard about library service</b>	<p><b><i>Through which of the following have you seen or heard about Suffolk Libraries?</i></b></p> <p>Pick list of options according to channels used (e.g. our website, a printed leaflet, word of mouth etc) plus 'None of these - I have not seen or heard any information about Suffolk Libraries'</p>	<p>Useful for identifying effective messaging and marketing channels</p> <p>Can be cross referenced with demographic profiles to identify which channels are likely to most effective for particular groups</p>	<p><b>Members:</b> Collected at point of joining</p> <ul style="list-style-type: none"> <li>▪ Survey / form</li> </ul> <p><b>Non-member library users:</b> Collected at point of service use / attendance</p> <ul style="list-style-type: none"> <li>▪ Survey</li> </ul>
<b>First-time or repeat in-person attender / frequency of attendance</b>	<p><b><i>Approximately how often do you visit this library?</i></b></p> <ul style="list-style-type: none"> <li>▪ Every day</li> <li>▪ At least once a week</li> <li>▪ At least once a fortnight</li> <li>▪ At least once a month</li> <li>▪ At least every two or three months</li> <li>▪ Two or three times per year</li> <li>▪ Once a year</li> <li>▪ Less often</li> <li>▪ This is my first visit</li> </ul>	<p>Useful for understanding patterns of library use which may inform decision making around service development etc</p>	<p><b>Members:</b> Collected at point of joining</p> <ul style="list-style-type: none"> <li>▪ Survey / form</li> </ul> <p><b>Non-member library users:</b> Collected at point of service use / attendance</p> <ul style="list-style-type: none"> <li>▪ Survey</li> <li>▪ Ticket booking system</li> </ul>

Note: Respondents should always be given the option of 'prefer not to say'. To support self-identification, questions related to gender, ethnicity, sexuality etc should always include an option to identify in another way (i.e. a way not listed in the response options).

DATA REQUIRED	QUESTION TEMPLATE(S)	RATIONALE / BENCHMARKING	DATA COLLECTION METHODOLOGY
NPS score	<i>On a scale of 0-10 how likely is it that you would recommend Suffolk Libraries, with 10 being extremely likely and 0 being not at all likely?</i>	Useful for generating insight into potential word of mouth recommendations and overall levels of satisfaction, which can be used for advocacy	<b>Members:</b> Collected at point of joining <ul style="list-style-type: none"> <li>Survey / form</li> </ul> <b>Non-member library users:</b> Collected at point of service use / attendance <ul style="list-style-type: none"> <li>Survey</li> <li>Ticket booking system</li> </ul>
Understanding of SL charitable status	<b>Do you think Suffolk Libraries is...</b>  Part of the Council / Owned by the Council / An independent charity / A private company / Another sort of organisation / Don't know		<b>Members:</b> Collected at point of joining <ul style="list-style-type: none"> <li>Survey / form</li> </ul> <b>Non-member library users:</b> Collected at point of service use / attendance <ul style="list-style-type: none"> <li>Survey</li> </ul>

### 3. SITES AND IN-PERSON SERVICE USE

Asking these questions will generate insights into how people are using the library services in-person, and their use of different library sites across the service (i.e. use of smaller neighbourhood / community libraries and/or larger central sites)

DATA REQUIRED	QUESTION TEMPLATE(S)	RATIONALE / BENCHMARKING	DATA COLLECTION METHODOLOGY
Main site used	<b>Which library site do you use most often?</b>  [Pick list of sites, including mobile library services if relevant]	This data may be drawn from your LMS for members, but the advantage of collecting through a survey is that it may be cross-referenced with survey-only data to provide further insights	<b>Members:</b> From system data or collected at point of attending <ul style="list-style-type: none"> <li>LMS</li> <li>Survey / form</li> </ul> <b>Non-member library users:</b> Collected at point of service use / attendance <ul style="list-style-type: none"> <li>Survey</li> </ul>
All sites used	<b>And which other sites do you use?</b>  [Pick list of sites, plus 'I don't visit any others' response option]	Follow on from main site question	<b>Members:</b> Collected at point of attending <ul style="list-style-type: none"> <li>Survey / form</li> </ul> <b>Non-member library users:</b> Collected at point of service use / attendance <ul style="list-style-type: none"> <li>Survey</li> </ul>



DATA REQUIRED	QUESTION TEMPLATE(S)	RATIONALE / BENCHMARKING	DATA COLLECTION METHODOLOGY
<p><b>Services used</b></p>	<p><b>Which of the following have you ever done at a Suffolk library?</b></p> <p>[Pick list of in-person services and activities, including use of space / facilities options, plus 'Something else' / 'What else have you done?' open response option]</p>	<p>Supports understanding of patterns of service use – asked in combination with other survey questions will support cross referencing with wider metrics such as user profiles and service awareness</p> <p>This may help inform service development and marketing / messaging strategies</p>	<p><b>Members:</b> Collected at point of attending</p> <ul style="list-style-type: none"> <li>▪ Survey</li> </ul> <p><b>Non-member library users:</b> Collected at point of service use / attendance</p> <ul style="list-style-type: none"> <li>▪ Survey</li> </ul>
<p><b>Service(s) most frequently used</b></p>	<p><b>And which do you do most frequently at Suffolk libraries?</b></p> <p>[Pick list repeated from services used question]</p>	<p>Follow on from services used question, to generate insight into which services are most used by most people</p>	<p><b>Members:</b> Collected at point of attending</p> <ul style="list-style-type: none"> <li>▪ Survey</li> </ul> <p><b>Non-member library users:</b> Collected at point of service use / attendance</p> <ul style="list-style-type: none"> <li>▪ Survey</li> </ul>
<p><b>Experience</b></p>	<p><b>How would you rate the Suffolk Libraries services / facilities you've used, based on your most recent experience of them?</b></p> <p>[Pick list repeated from services used question, with ratings responses: Very Good / Good / Poor / Very Poor / Not applicable (not used)]</p> <p><b>What could Suffolk Libraries do to improve anything you rated poorly?</b></p> <p>[Follow up open text response]</p>	<p>Using year-on-year benchmarking, this allows you to track progress in service development – specifically for any services or facilities which have received lower ratings</p> <p>If cross referenced with other survey metrics, such as demographic profiles, this offers insight into the extent to which you are meeting user needs equally – if it appears that the experience is poorer for some user groups, you may want to follow that up with some qualitative research (focus groups etc) to understand why, and how you might address these issues</p>	<p><b>Members:</b> Collected at point of attending</p> <ul style="list-style-type: none"> <li>▪ Survey</li> </ul> <p><b>Non-member library users:</b> Collected at point of service use / attendance</p> <ul style="list-style-type: none"> <li>▪ Survey</li> </ul>

## 4. IN-PERSON PARTICIPATION – EVENTS AND ACTIVITIES

Asking these questions will generate insights into engagement with in-person library programmes and activities to support programme development and marketing

DATA REQUIRED	QUESTION TEMPLATE(S)	RATIONALE / BENCHMARKING	DATA COLLECTION METHODOLOGY
Levels of engagement with in-person events and activities	<p><b>Which of the following Suffolk Libraries activities and events have you been to?</b></p> <p>[Pick list of events and activities, including one-offs and regularly scheduled programming, plus 'I've never been to a Suffolk Libraries activity or event in person' option if data collection is not in-person at the event]</p>	<p>Supports understanding of patterns of programme engagement – asked in combination with other survey questions will support cross referencing with wider metrics such as user profiles and service awareness to track programme engagement for different audience groups</p> <p>This may help inform programme development and marketing / messaging strategies</p>	<p><b>Members:</b> Collected at point of attending</p> <ul style="list-style-type: none"> <li>Survey</li> </ul> <p><b>Non-member library users:</b> Collected at point of service use / attendance</p> <ul style="list-style-type: none"> <li>Survey</li> </ul>
Experience	<p><b>How would you rate the Suffolk Libraries events and activities you've been to, based on your most recent experience of them?</b></p> <p>[Pick list repeated from activities / events attended question, with ratings responses: Very Good / Good / Poor / Very Poor / Not applicable (not attended)]</p> <p><b>What could Suffolk Libraries do to improve anything you rated poorly?</b></p> <p>[Follow up open text response]</p>	<p>Using year-on-year benchmarking, this allows you to track progress in programme development – specifically for any events or activities which have received lower ratings</p> <p>If cross referenced with other survey metrics, such as demographic profiles, this offers insight into the extent to which you are meeting audience needs equally – if it appears that the experience is poorer for some user groups, you may want to follow that up with some qualitative research (focus groups etc) to understand why, and how you might address these issues</p>	<p><b>Members:</b> Collected at point of attending</p> <ul style="list-style-type: none"> <li>Survey</li> </ul> <p><b>Non-member library users:</b> Collected at point of service use / attendance</p> <ul style="list-style-type: none"> <li>Survey</li> </ul>
Discovery - how / where heard about the event/ activity	<p><b>Through which of the following have you seen or heard about events and activities at Suffolk Libraries?</b></p> <p>[Pick list of options according to channels used (e.g. our website, a printed leaflet, word of mouth etc) plus 'None of these - I have not seen or heard any information about Suffolk Libraries events']</p>	<p>Useful for identifying effective messaging and marketing channels</p> <p>Can be cross referenced with demographic profiles to identify which channels are likely to most effective for particular groups</p>	<p><b>Members:</b> Collected at point of attending</p> <ul style="list-style-type: none"> <li>Survey</li> </ul> <p><b>Non-member library users:</b> Collected at point of service use / attendance</p> <ul style="list-style-type: none"> <li>Survey</li> </ul>
Event programme awareness and relevance	<p><b>To what extent would you agree or disagree with these statements about Suffolk Libraries activities and events?</b></p> <p>I know what's going on at my local library / I enjoy these activities and/or events / They're relevant or interesting to me</p>	<p>Responses to these statements will offer insight into levels of awareness of the events and activities programme offer, and the extent to which the offer is relevant.</p> <p>Cross-referenced with other survey metrics this may be used to inform targeted marketing and programme development.</p>	<p><b>Members:</b> Collected at point of attending</p> <ul style="list-style-type: none"> <li>Survey</li> </ul> <p><b>Non-member library users:</b> Collected at point of service use / attendance</p> <ul style="list-style-type: none"> <li>Survey</li> </ul>

## 5. DIGITAL SERVICE USE AND ACCESS

Asking these questions will generate insights into levels of engagement with your digital service offer, how users rate the experience, plus awareness and access to the offer. This may help inform digital offer development and marketing / messaging

DATA REQUIRED	QUESTION TEMPLATE(S)	RATIONALE / BENCHMARKING	DATA COLLECTION METHODOLOGY
Levels of digital service use	<p><b>Which of the following Suffolk Libraries digital services have you used?</b></p> <p>[Pick list of digital services, plus 'Other online service' / What other Suffolk Libraries online services have you used? open response option, and 'I have never used Suffolk Libraries' online services option]</p> <p><b>And which Suffolk Libraries digital services do you use most frequently?</b></p> <p>[Follow on question, using same pick list]</p>	<p>Asked in combination with other survey questions, this will support cross referencing with wider metrics such as user profiles and service awareness</p> <p>This may help inform service development and marketing / messaging strategies</p>	<p><b>Members and non-members:</b></p> <ul style="list-style-type: none"> <li>Survey</li> </ul>
Experience of digital service use	<p><b>How would you rate the Suffolk Libraries digital services you've used, based on your most recent experience of them?</b></p> <p>[Pick list repeated from digital services used question, with ratings responses: Very Good / Good / Poor / Very Poor / Not applicable (not attended)]</p> <p><b>What could Suffolk Libraries do to improve anything you rated poorly?</b></p> <p>[Follow up open text response]</p>	<p>Using year-on-year benchmarking, this allows you to track progress in service development – specifically for any services or facilities which have received lower ratings</p> <p>If cross referenced with other survey metrics, such as demographic profiles, this offers insight into the extent to which you are meeting user needs equally – if it appears that the experience is poorer for some user groups, you may want to follow that up with some qualitative research (focus groups etc) to understand why, and how you might address these issues</p>	<p><b>Members and non-members:</b></p> <ul style="list-style-type: none"> <li>Survey</li> </ul>
Digital service awareness and access	<p><b>To what extent would you agree or disagree with these statements about Suffolk Libraries' digital services?</b></p> <p>[List of statements with Strongly agree / Agree / Neither agree nor disagree / Disagree / Strongly disagree / Don't know or Not applicable response options] / I know what digital services Suffolk Libraries offer / I find it easy to access the digital services / I enjoy using the digital services / Suffolk Libraries digital offer is the only way I access these sorts of services</p>	<p>Responses to these statements will offer insight into levels of awareness of the digital offer, and the extent to which Suffolk Libraries supports access to these services which would not otherwise be available to users – this may be used to inform marketing and advocacy, in addition to service development</p>	<p><b>Members and non-members:</b></p> <ul style="list-style-type: none"> <li>Survey</li> </ul>

## 6. DIGITAL PARTICIPATION – EVENTS AND ACTIVITIES

Asking these questions will generate insights into engagement with online library programmes and activities to support programme development and marketing

DATA REQUIRED	QUESTION TEMPLATE(S)	RATIONALE / BENCHMARKING	DATA COLLECTION METHODOLOGY
Levels of engagement with online events and activities	<p><b>Which of the following Suffolk Libraries online activities / events have you attended?</b></p> <p>[Pick list of events and activities, including one-offs and regularly scheduled programmes, plus 'I've never been to a Suffolk Libraries online activity or event' option]</p>	<p>Supports understanding of patterns of engagement with the online offer – asked in combination with other survey questions it will support cross referencing with wider metrics such as user profiles and service awareness to track digital engagement for different audience groups</p> <p>This may help inform online offer development and marketing / messaging strategies</p>	<p><b>Members and non-members:</b></p> <ul style="list-style-type: none"> <li>Survey</li> </ul>
Experience of engagement with online events and activities	<p><b>How would you rate Suffolk Libraries online events or activities, based on your most recent experience of them?</b></p> <p>[Pick list repeated from activities / events attended question, with ratings responses: Very Good / Good / Poor / Very Poor / Not applicable (not attended)]</p> <p><b>What could Suffolk Libraries do to improve anything you rated poorly?</b></p> <p>[Follow up open text response]</p>	<p>Using year-on-year benchmarking, this allows you to track progress in programme development – specifically for any events or activities which have received lower ratings</p> <p>If cross referenced with other survey metrics, such as demographic profiles, this offers insight into the extent to which you are meeting audience needs equally – if it appears that the experience is poorer for some user groups, you may want to follow that up with some qualitative research (focus groups etc) to understand why, and how you might address these issues</p>	<p><b>Members and non-members:</b></p> <ul style="list-style-type: none"> <li>Survey</li> </ul>
Discovery - how / where heard about the event/ activity	<p><b>Through which of the following have you seen or heard about Suffolk Libraries online events and activities?</b></p> <p>[Pick list of options according to channels used (e.g. our website, a printed leaflet, word of mouth etc) plus 'None of these - I have not seen or heard any information about Suffolk Libraries online events and activities']</p>	<p>Useful for identifying effective messaging and marketing channels</p> <p>Can be cross referenced with demographic profiles to identify which channels are likely to most effective for particular groups</p>	<p><b>Members and non-members:</b></p> <ul style="list-style-type: none"> <li>Survey</li> </ul>

## 7. MONITORING WELL-BEING AND OTHER SOCIAL OUTCOMES OF ENGAGEMENT

Asking these questions will generate insights into broad learning and social outcomes as a result of engagement with the library services which may be useful for advocacy (evidencing value) and service development (identifying areas for review)

DATA REQUIRED	QUESTION TEMPLATE(S)	RATIONALE / BENCHMARKING	DATA COLLECTION METHODOLOGY
<p><b>Learning and social outcomes of library engagement for users / attenders</b></p>	<p><b><i>How would you rate Suffolk Libraries for the following? (Please give one rating for each item) [With a rating scale of Very good / Good / Poor / Very poor / Don't know / Not applicable]</i></b></p> <ul style="list-style-type: none"> <li>▪ As a place where you can learn</li> <li>▪ For building your knowledge, understanding, skills and expertise</li> <li>▪ For inspiring you to use what you've done or seen here in other aspects of your life</li> <li>▪ For building pride in this local area</li> <li>▪ For encouraging you to participate in community matters</li> <li>▪ As a place for the whole community</li> <li>▪ As a social space</li> <li>▪ Book collections and resources that are relevant to you</li> <li>▪ Giving you good access to physical books and resources</li> <li>▪ Giving you good access to digital books and resources</li> <li>▪ Having knowledgeable and responsive staff</li> <li>▪ Making you feel welcome and comfortable</li> <li>▪ Giving you a good quality experience</li> <li>▪ Being responsive to your needs</li> </ul> <p><b><i>Could you tell us a bit more about why you answered in the way you did?</i></b></p> <p>[Follow up open text response]</p>	<p>This is derived from a standard set of questions used in Audience Finder and aligned with Art Council England's Generic Learning Outcomes</p> <p>The open text follow up question will give an added layer of actionable insight for use in informing advocacy and service development</p>	<p><b>Members and non-members:</b></p> <ul style="list-style-type: none"> <li>▪ Survey</li> </ul>

DATA REQUIRED	QUESTION TEMPLATE(S)	RATIONALE / BENCHMARKING	DATA COLLECTION METHODOLOGY
<p><b>Sources of value for library users</b></p>	<p><b><i>Thinking about your most recent experience, to what extent would you agree or disagree with these statements about Suffolk Libraries' services?</i></b></p> <p>[List of statements with Strongly agree / Agree / Neither agree nor disagree / Disagree / Strongly disagree / Don't know or Not applicable response options]</p> <ul style="list-style-type: none"> <li>■ I trust the information I access through the library service</li> <li>■ The library is my main or sole source of information about the things I am interested in</li> <li>■ Use of IT equipment and WiFi in the library is the main or only way I access these resources</li> <li>■ Books from the library are my main or only source of reading for my own enjoyment</li> <li>■ Books and resources from the library are my main or only source of study materials</li> <li>■ It is important to me that there is a library local to me</li> <li>■ I value the library as a place I can spend time without the expectation of spending money</li> <li>■ I value the library as a warm, safe space</li> </ul> <p><b><i>Could you tell us a bit more about why you answered in the way you did?</i></b></p> <p>[Follow up open text response]</p>	<p>These questions have been developed to assess the personal value of library engagement for users</p> <p>They are not directly aligned to existing impact frameworks, but reflect the areas of impact used to measure social and economic impacts</p> <p>Asking the open follow up question will support a deeper understanding of how library users feel about the service and what it means to them</p>	<p><b>Members and non-members:</b></p> <ul style="list-style-type: none"> <li>■ Survey</li> <li>■ Discussion group / interview (basis for)</li> </ul>

# IMPACT EVALUATION

Impact evaluation is a complex area of investigation, and is likely to require significant time and financial resource in terms of identifying relevant impact measures, developing a framework, collecting data, and data analysis.

Some measure of library engagement impacts can be captured using the tools described in the engagement monitoring section. However, more comprehensive and externally benchmarkable impact assessment models often require specific analytics tools and skills which may not be internally available to the library service. It is therefore likely that there will be budgetary considerations associated with the use of these models.

## 1. WELLBEING AND SOCIAL IMPACTS

Wellbeing is a complex subject with multiple facets. Basic wellbeing monitoring questions are included in the toolkit, but in order to deliver a comprehensive evaluation of the social impact of engagement with the library services, you will first need to develop an evaluation framework and/or Theory of Change that sums up what it is that Suffolk Libraries is aiming to achieve.

For example, you might be interested in the impact of:

- User interactions with library staff members
- Other social contact within libraries
- Use of IT equipment within libraries
- Use of books, other content and resources provided by libraries (whether in the library or at home)
- Specific activities provided by libraries
- The space and facilities provided by libraries (including heat, seating, toilets, access features etc)

It is likely that you will need to identify different impact goals for different elements of library service delivery; for example, fostering social interaction, civic engagement, a sense of place, digital skills, supporting ESOL learners, or something else entirely. The [DCMS 7 Outcomes Libraries Deliver](#) might be a useful framework for you to draw on when considering your goals, although you may need to consider more detailed objectives within the overarching categories described in the model.

Models of wellbeing can also contribute to your Theory of Change, as well as helping you develop questions to measure wellbeing. Here you might want to consider:

- [Warwick-Edinburgh Mental Wellbeing Scale](#)
- [Guidance and Standards - Social Value UK](#)
- Outcomes monitoring forms created by Moore Kingston Smith research for Suffolk Libraries (see appendices)

Rather than seeking to benchmark the wellbeing of library users against non-users (as there may be significant differences in the baseline wellbeing of each constituent group), it is more useful to think about how engagement with libraries has affected (raised or lowered) wellbeing for those who have engaged.

In thinking through your approach to evaluating well-being impacts of library engagement, Suffolk Libraries may find the [Free Library of Philadelphia Impact Evaluation Report](#) a useful resource.

## 2. ECONOMIC IMPACTS

Running full economic impact assessments or calculating Return on Investment are complex and specialised activities. Whilst delivery of these activities is likely to require the services of specialists in the field, HM Treasury's [Green Book](#) does offer guidance on best practice in appraisal and evaluation.

It may be more manageable for Suffolk Libraries to consider the metrics that contribute to economic impact. This review for [Arts Council England of the economic impact of libraries](#) (despite dating from 2014) gives an idea of those benefits created by libraries that might lead to economic impact; these include the wellbeing benefits identified in the previous section.

Other basic metrics relevant from an audience/user perspective might include:

- Monetary savings for library users (compared to purchasing books/music/electronic resources and IT access on the open market)
- Development of literacy and other English language skills (speaking, writing)
- Development of digital skills
- Other learning or skills development through use of library content/resources/activities
- Small business development through use of library resources

### 3. SUSTAINABILITY AND ENVIRONMENT

Like economic impact, environmental impact has many facets – including the energy required to build and heat buildings, staff commutes, production and delivery of IT equipment, book stocks, and more. Julie's Bicycle's [CC Tools](#), once released, will be useful in considering your overall impact.

For the purposes of this toolkit we focus on direct impacts from the library user perspective. As part of your regular monitoring questions, we suggest that you ask how visitors arrived at the library and how far they travelled. This will provide a baseline for transport impact, which is probably the most significant in a user context.

If you offer programming, resources or content relating to sustainability and the environment, you may also want to consider the extent to which your services have changed people's views on these issues and/or provided them with the knowledge and skills they need to be more environmentally sustainable in their own lives.





# ENGAGEMENT MONITORING AND IMPACT EVALUATION OVERVIEW

Measuring impact supports informed decision making, planning, advocacy, and investment and is essentially about evidencing and documenting **CHANGE**:

- What's your objective?
- How are you going to know what you achieved?
- How will learn from the process – what worked well, what didn't work so well, and why?
- How will you share your story?

Collecting and sharing meaningful impact data supports the development of a shared narrative around who you are and what you do, regardless of who is telling the story, or to whom they are talking.

### Internally it supports...

- Joined up thinking and shared understanding of objectives
- Shared learning and a cross-team approach to service and offer development
- The development of shared stories and consistent messages.

### Externally it can...

- Bring your purpose to life
- Evidence your social impacts / value for money / return on investment to stakeholders
- Strengthen funding applications – based on facts, not supposition

- Improve stakeholder engagement – you have compelling stories to tell and can demonstrate impacts
- Support the cultivation of meaningful partnerships and collaboration – shared objectives, shared values, shared resources.

### THEORY OF CHANGE

The Theory of Change model emphasises the journey towards a planned goal, in which you articulate the difference you are aiming to make and outline how you are going to achieve it; it is also sometimes described as a 'story of change' – a 'story' or 'narrative'.

Whilst it is not an evaluation model as such, Theory of Change modelling can be useful in the context of impact assessment because:

- It helps you to define what you are planning to do rather than expressing vague aspirations
- It's collaborative and consensual so you can plan together to agree what you want to achieve and develop a shared understanding of risks and considerations
- Once you know what you are aiming to do, you can decide how you are going to measure the extent to which it has been achieved (see diagram below)

A combination of the collection of existing and new data may often provide the most complete understanding and tracking of the effectiveness and impact of your work within your theory of change model.



### DEVELOPING AN EVALUATION FRAMEWORK

An evaluation framework maps out existing benchmarks and what data you need to collect to measure your impact and progress against your objectives. It may also include how often data is to be collected (i.e. through ongoing processes or periodic / specific project research), how it will be collected, and who is responsible for data collection, analysis, and safe storage etc.

The framework should be developed through cross-organisation consultation and any data collection responsibilities embedded

as business as usual to support consistent data collection and staff motivation and confidence.

In developing a framework, you may find the Centre for Cultural Values' [Evaluation Principles](#) a useful resource.

Your framework should be developed to meet your needs and fit within any existing systems as appropriate; the example below is included here for guidance.

#### Example evaluation framework

OBJECTIVE / OUTCOME	SUCCESS MEASURES / INDICATORS	BENCHMARK SOURCES	DATA COLLECTION METHODS	DATA RESPONSIBILITIES	TIMEFRAME
<p><b>Example:</b></p> <p>Engagement with 16-24 year olds increased by 5% across the library service within the next 12 months</p>	<ul style="list-style-type: none"> <li>Higher level of membership</li> <li>Increased use of on-site services</li> <li>Increased use of online services</li> </ul>	<ul style="list-style-type: none"> <li>LMS membership data</li> <li>2022 Understanding Audiences report</li> </ul>	<ul style="list-style-type: none"> <li>LMS</li> <li>Annual monitoring survey (face-to-face and e-survey)</li> </ul>	<p>Collection - [?]</p> <p>Analysis - [?]</p> <p>Dissemination - [?]</p>	<p>2023-24 financial year</p>

### SMART OBJECTIVE SETTING

The use of SMART objectives can help to identify KPIs and measures of success against your strategic engagement development aims, and ensure that these are both achievable and measurable; both of which are integral to effective impact assessment.

**Specific** - Your objective is clearly defined and unambiguous

**Measurable** - Your objective uses obtainable, robust, evidence to measure achievement

**Achievable** - Your objective may be challenging but should be informed and viable

**Relevant** - Your objective must matter to Suffolk Libraries and relate to its strategic vision

**Timetabled** - Objectives need grounding within a time frame, with a delivery date

It is important to understand and quantify how your objectives sit within your overall Business As Usual (BAU) planning and delivery<sup>2</sup>, so that the setting of SMART objectives is realistic, proposals for change and development are founded on sufficient understanding, and impacts can be effectively monitored and evaluated.

### MEASURING WHAT MATTERS

It is important that the metrics used to measure impacts are meaningful to both Suffolk Libraries as an organisation, and to their stakeholders – including library members, users, and funders etc. The focus of any impact assessment strategy should be on what matters, not on what data it is easy to collect.

The appraisal of social value, also known as public value, is based on the principles and ideas of welfare economics and concerns overall social welfare efficiency, not simply economic market efficiency.

Social or public value therefore includes all significant costs and benefits that affect the welfare and wellbeing of the population, not just market effects. For example, environmental, cultural, health, social care, justice and security effects are included<sup>3</sup>.

<sup>2,3</sup> [The Green Book: appraisal and evaluation in central government - GOV.UK \(www.gov.uk\)](#)

## DECIDING WHAT DATA YOU NEED

- Think first about everyone in the Suffolk Libraries teams who may need to use this data, what they need, and why. This may include your own team, the management team, funders, and partner organisations etc.
- Prioritising what data to collect can cause challenges with limited time and resource. The VUMI acronym can provide a useful sense check to help focus - consider if the data you are planning to collect is:

### Vital, Useful, or Merely Interesting

**Vital** data is anything needed for required reporting to funders and other stakeholders and should be included as standard in your ongoing impact monitoring. This is likely to form your 'core' data set and used across all activities, even if you might not make direct use of it in your area of work.

**Useful** data is anything that will support informed decision making for strategic development of the offer (including services, programming, marketing, partnership development etc.) It should be considered further and asked as and when needed.

**Merely Interesting** information, that cannot be used in any way, should be discounted.

## IDENTIFYING AND SETTING BENCHMARKS

To evidence change and evaluate impacts effectively it is important to identify and / or set meaningful benchmarks.

Depending on the change indicators, these might be external (such as population or national cultural / library engagement insights) or internal (such as existing membership or library user profile data). Some elements of an evaluation plan might include pieces of work to set internal benchmarks to inform future measures of success and KPIs.

Use of appropriate benchmarks can support SMART objective setting by indicating what level of change is likely to be Realistic.

## PRACTICAL CONSIDERATIONS

Impact monitoring and evaluation should be built into business as usual planning and considered at the start of any specific project development. Proportionate budgetary and management provisions should be made for each stage of the impact assessment, both during and after implementation, including data collection, analysis, use / dissemination, and storage.

## TYPES OF ACTIVITY

The context of how and where you are engaging with your audiences is important. The type of activity and style of delivery will influence what you can measure, and what data collection methodologies are likely to be most effective.

- Is it through an essential service, part of an ongoing programme of activity, a one-off event? Etc
- Is the engagement long-term (e.g. through membership) or transitory (e.g. drop-in use of IT equipment)
- Who is delivering the activity? (e.g. staff, volunteers, external delivery partner?)
- Is it designed to be a fun or more formal experience (or bit of both)?
- Is the space public or a dedicated room?
- Is it in the library or somewhere else on-site (where the library is part of multi-use building) or at another site entirely? School, shopping centre, outdoor space etc

## TYPES OF AUDIENCE

The impact of your work for library members, service users, and participants will be influenced by their life experience, expectations, preferences, and existing levels of engagement with you or the activity.

These factors should be considered in your evaluation strategy:

- What journey have they taken up to this point?
- Where are they going from here?
- What impact do you want to have on that journey?
- How will you know?

When measuring the value of an experience, for example, it is important to avoid making assumptions about the context in which someone's experience sits; avoid asking leading questions, or questions which rely on a certain level of knowledge / experience to deliver a meaningful response. Be clear about the changes you are looking for, and how they can be evidenced.

## MOTIVATING YOUR TEAM

Impact evaluation has benefits for the whole organisation, but the data collection needed to inform it is often seen as an 'add-on' to an already busy schedule and there are often skills and confidence gaps within library teams.

There are some approaches which may support buy-in from your teams, and encourage them in developing the skills and confidence needed to deliver robust and meaningful impact data collection.

- Build it into job / role descriptions so it's seen as business as usual, not something to do if there's extra time available (there rarely is!)
- Emphasise the benefits that data collection can bring - ensure that staff and volunteers understand how collecting data empowers the organisation and informs decision making, and that it is not just an add on to what they already do
- Share the impacts of collecting data with those who are doing it - give them access to reporting and outcomes, be open about how the data is used, talk about it at staff / volunteer meetings, circulate reports, celebrate successful funding bids etc
- Offer training and support to build confidence - be clear about what is expected of staff and volunteers, ensure that they have the necessary skills and information they need to be confident about what they are doing, and offer them opportunities to ask questions about the process

## ENCOURAGING PARTICIPATION

The word 'evaluation' can trigger a range of different thoughts and feelings in people. Some may be familiar and comfortable with the process, others may feel it has negative connotations, such as being tested or judged, intrusion, and 'box ticking'. It is important to make sure that participants understand the purpose and process of evaluation and demographic monitoring, so it doesn't feel intimidating or intrusive. It is important to explain:

- The purpose of the evaluation
- What data will be captured and why
- How it will be used
- That it is Suffolk Libraries and not the participants that are being evaluated
- That all feedback is welcomed, positive and negative
- Anonymity and confidentiality
- How the information will help Suffolk Libraries improve their offer and support equitable access to services

When people feel that their feedback will be valued and respected, they are more likely to engage with evaluation.

Offering incentives may also support participation in consultation, and is particularly important when considering consultation with people who do not currently engage with the service. More guidance on this is given in the methodologies section.

## CONSULTATION WITH NON-USERS

To build understanding of the reasons why people might not be engaging with your services, and how you might address any particular barriers to engagement, you may find it helpful to consult with non-users.

For quantitative consultation with non-users, you might consider a resident survey, perhaps conducted through the local authority where this is appropriate, or on-street survey. In each case the survey design should consider the context of the research to support meaningful responses and sampling.

Qualitative approaches are often more effective in non-user consultation, as they allow you to dig deeper into the reasons for non-engagement and discuss potential developments to the service offer that might support increased awareness, relevance, or access etc. You can also use targeted recruitment if, for example, you have identified that there are particular groups of people in the communities you serve that are not engaging with the library services.

Where resource is available to do so, it can be helpful to commission external support in conducting consultations with non-users as people often feel more confident in being critical if they are speaking with third-party facilitators.

## EVALUATION WITH CHILDREN AND YOUNG PEOPLE (UNDER 16s), AND VULNERABLE ADULTS

Sometimes it may be necessary or important for Suffolk Libraries to conduct evaluation of their family programming directly with children. If this is the case, consideration must be given to both safeguarding and the use of appropriate methodologies which support meaningful participation and responses by children.

Children and young people under the age of 16 (CYP) should not be approached to take part in research or consultation without the permission of the adult(s) who are responsible for them (guardians, parents, grandparents etc).

Similar safeguarding must be respected when looking for participation from vulnerable adults.

Public library services which operate within local authorities have well developed and comprehensive safeguarding policies and procedures which should be followed when designing and developing monitoring and evaluation with CYP and vulnerable adults.

## METHODOLOGIES

When deciding on the appropriate method of data collection there are a number of factors that it is helpful to consider, such as:

- Resource need – staff time, budget for external input etc
- Participant needs – comfortable space to take part, time required, access considerations, budget for incentivised participation (this is especially relevant to qualitative research where you are asking for a considerable time input from participants) etc
- Context of the data collection – what type of activity (time limited or ongoing etc), who is taking part (adults, families etc), where the activity is taking place (in a library space, online, other public space etc)
- Sample required – will the data collection be ongoing, collected periodically, or as a one-off attached to a particular event or activity
- Type of data needed – quantitative (broad, large sample insights) or qualitative (deeper insights)
- How is the data going to be used – analysis, dissemination, and safe storage etc

## SURVEY DATA COLLECTION

Survey data can be collected in a range of different ways, depending on the context – these include face-to-face interviews, supported self-completion, e-surveys, and online pop-up surveys.

Whichever method is chosen, positioning of the survey is important for ensuring that participants can make an informed decision to take part (in line with GDPR) and to support participation. Introductions and explanations should include why the questions are being asked, how their input will help inform the development of library services and advocate for support (for example), and how long it will take.

### ▪ Face-to-face interviews

Surveys are completed through a face-to-face conversation. In many ways this is the ideal approach, as the interviewer can ensure that respondents fully understand what is being asked and the data collection can be planned to support a representative sample which mitigates against bias (including unconscious bias on the part of the interviewer, and methodological bias).

Practically, however, it is a challenging approach for libraries as it requires significant staff time or resource to commission professional fieldworkers.

### ▪ Supported self-completion

This is where people are encouraged to take part in the research and given a survey to complete, which is then checked by staff or volunteers to ensure the respondent has correctly identified what is needed for each question (e.g. full postcode, only one response chosen etc).

This can be a pragmatic solution to not having sufficient resource to undertake face-to-face interviews.

### ▪ E-surveys

E-surveys require less staff time in terms of facilitation, as they can be sent to members and library users to complete in their own time. Permissions need to be sought for compliance with GDPR, and emails will need to be collected from non-users at the point of service use, event attendance, or booking (as relevant).

It should be noted that responses can be low, so a high volume of e-surveys may need to be sent out in order to achieve the required sample size, and there is an element of self-selection bias inherent in the methodology; this may be mitigated against through the use of incentives such as a prize draw, where appropriate.

### ▪ Online pop-ups

Pop-up surveys can be deployed on websites to capture responses from website users. Once implemented these may require some ongoing maintenance, and it can be annoying to frequent website users if the pop-up appears repeatedly. As with e-surveys, this methodology also carries an inherent self-selection bias.

### QUICK FEEDBACK / MONITORING OPTIONS

There are also options for collecting data through quick feedback methods. These are useful for collecting minimal information such as one or two open response questions, but are most effective if they also ask for accompanying profile data (such as date of birth, or postcode) that may be used to understand how different types of audience respond to the question(s) asked.

### TICKET BOOKING SYSTEMS

If the library has invested in the use of a ticket booking system, which is secondary to any booking functionality of their LMS, this may be used to collect some standard data at the point of booking. This might include, for example, their email address, postcode, and whether or not they are a library member.

It may also be useful to include GDPR compliant opt-ins to receive further communications from the library, to support future use of email contact details to send out invitations to take part in research / consultation etc.

### CREATIVE APPROACHES

There are two distinct approaches to taking a more creative approach to evaluation data collection: either transforming a more traditional method of data collection into something creative, such as a feedback form with an unusual design or question set, or prompting creative responses from participants to describe their experience, such as feedback in the form of a poem.

Creative approaches can be much more accessible to participants who are younger, have lower literacy levels, and/or are lower engaged. Even though these approaches are non-traditional, they should still be rigorous and founded on measuring established objectives; when using creative approaches, it is important to incorporate the same good practices you would for any other evaluation method.

The drawbacks of creative approaches are that they produce data which takes longer to analyse, and they often need to be used in combination with other methods to capture a complete picture. Be wary of choosing creative approaches for their own sake – they should be used because they are the most useful method for collecting the data you need.

### DISCUSSION GROUPS AND INTERVIEWS ETC

In-depth, qualitative methodologies, such as discussion groups or one-to-one interviews rely on a set of open questions, known as a topic guide, which is used to guide the conversation. As with all evaluation, your objectives are the starting point for developing a topic guide, but questions should be as simple and open as possible to avoid leading the participant to an inaccurate answer. For example:

- If 'Participant learns something' is your objective, your question might be: 'What, if anything, have you learnt from this activity?'
- Likewise, if your objective is that 'Attender perceptions about XYZ change' then your question could be 'Have your perceptions about anything changed after visiting X library site or taking part in X activity, and if so in what ways have they changed? And why?'
- For an objective such as 'Attendees have an enjoyable and/ or inspiring experience' the questions could be 'Have you enjoyed the activity, and if so how? And if not, why not?' or 'Has this activity inspired you in any way? Can you tell us a bit more about that?'

# APPENDICES

## i. DEFINITIONS / GLOSSARY

- **Evaluation** can be formative, helping you to identify how well you are meeting your objectives and if you need to make any adjustments, or summative, to assess the overall impacts of engagement for a particular period of time or specific project.
- **Methodology** is the method you use to collect your data. Methodologies include, but are not limited to: surveys, interviews, discussions, observations, and creative approaches. Social media and the use of digital analytics is also increasingly used as a way to collect information and feedback from audiences.
- **Monitoring** is an on-going review of your service delivery and can help you to track longer-term impacts. You can track the ongoing impact on attender profiles of a regular programme of activity, or if you change your marketing / messaging strategy you can monitor whether the new approach is reaching your target audiences.
- **Segmentation** is the process of grouping people together in terms of what they have in common within particular contexts, it can be helpful for understanding motivations for and barriers to engagement in addition to identifying potential routes to engagement with underserved segments.

There are many different ways to segment people, but two of the most useful for monitoring and evaluation of library services are Audience Spectrum and Mosaic.

- Audience Spectrum has been developed by The Audience Agency for the specific purpose of understanding cultural engagement at a population level. It divides the UK population into 10 segments, and 20 sub-segments, based on what people share in terms of their opportunities, preferences, attitudes, and barriers in relation to engagement with arts and culture; this includes engagement with libraries and archives.
- Mosaic is a cross-channel consumer classification system developed by Experian. It segments the population into 15 groups and 66 types by lifestyle and consumer habits and is widely used by local authorities as a way of understanding the socio-economic status of their service users.
- Qualitative data is collected by asking open questions, probing or seeking comments to obtain richer information about beliefs, motivations and attitudes e.g. our library is seen as welcoming and friendly.
- Quantitative data is usually collected through closed, rated or tick box questions which obtain numbers and proportions of people that fit set criteria e.g. 70% of participants rate their experience as very good.



## ii. LIFELINE SERVICE IMPACT MONITORING FORMS – MOORE KINGSTON SMITH

### STAFF

#### SUFFOLK LIBRARIES: OUTCOMES MONITORING FORM (FOR STAFF TO COMPLETE ON BEHALF OF CLIENTS)

These questions are intended to help Suffolk Libraries gather evidence to monitor the impact that they are having on their clients as a direct result of the Lifeline service. The questions focus on changes for clients and are based on impact research conducted by the Moore Kingston Smith Fundraising and Management Impact team.

#### A. PLEASE INDICATE TO WHAT EXTENT YOU BELIEVE THE CLIENT HAS EXPERIENCED THE BELOW OUTCOMES AS A RESULT OF THE PHONE CALLS THEY HAVE RECEIVED FROM THE LIFELINE SERVICE TEAM

	STRONGLY DISAGREE	DISAGREE	SLIGHTLY DISAGREE	DON'T KNOW	SLIGHTLY AGREE	AGREE	STRONGLY AGREE
They have increased feelings of being cared about and valued							
They feel less lonely							
Their mood is lifted and they feel less anxious							
The phone calls provide them with some escape from the tough reality around them – they feel better able to cope							
They feel more connected to the library and that they are part of the library community							
They have better knowledge about the library services and other local support because of the phone calls							
They miss the library because the phone calls remind them about the activities they used to take part in at the library							

#### B. PLEASE INDICATE TO WHAT EXTENT YOU BELIEVE THE CLIENT'S FAMILY (WHETHER THAT IS A PARTNER, CHILDREN OR OTHER) HAS EXPERIENCED THE BELOW OUTCOME

	STRONGLY DISAGREE	DISAGREE	SLIGHTLY DISAGREE	DON'T KNOW	SLIGHTLY AGREE	AGREE	STRONGLY AGREE
Their family feel less worried about them because they know they have some support through the Lifeline service							



**C. OUT OF THE CHANGES THAT THE CLIENT HAS EXPERIENCED, WHICH DO YOU THINK ARE THE MOST IMPORTANT ONES FOR THEM? PLEASE TICK UP TO THREE CHANGES**

	STRONGLY DISAGREE	DISAGREE	SLIGHTLY DISAGREE	DON'T KNOW	SLIGHTLY AGREE	AGREE	STRONGLY AGREE
They have increased feelings of being cared about and valued							
They feel less lonely							
Their mood is lifted and they feel less anxious							
The phone calls provide them with some escape from the tough reality around them – they feel better able to cope							

**D. HAS THE CLIENT AVOIDED USING ANY OF THE NHS SERVICES DUE TO THE SUPPORT THEY HAVE RECEIVED FROM THE LIFELINE SERVICE?**

Yes  No  If yes, which NHS service in particular? \_\_\_\_\_

**E. ARE THERE OTHER CHANGES OR OUTCOMES THAT THE CLIENT HAS EXPERIENCED AS A RESULT OF THE LIFELINE SERVICE THAT ARE NOT INCLUDED ABOVE?**

**F. USE THE BELOW BOX TO ADD ANY OTHER FEEDBACK EITHER FROM THE CLIENT OR YOURSELF**

**SUFFOLK LIBRARIES: OUTCOMES MONITORING FORM (FOR LIBRARY CLIENTS)**

The following questions specifically ask about the changes that have occurred for you as a result of receiving the Lifeline phone calls. The feedback you provide will help Suffolk Libraries monitor and understand the impact that this service is having on their clients.

**A. PLEASE INDICATE FOR EACH OF THE BELOW CHANGES HOW MUCH YOU IDENTIFY WITH THAT PARTICULAR CHANGE. USE THE 'DON'T KNOW' OPTION IF YOU FEEL THE CHANGE DOES NOT APPLY TO YOU.**

	STRONGLY DISAGREE	DISAGREE	SLIGHTLY DISAGREE	DON'T KNOW	SLIGHTLY AGREE	AGREE	STRONGLY AGREE
The phone calls have made me feel like I am cared about and valued							
The phone calls have helped me feel less lonely							
My mood is lifted and I feel less anxious because of the phone calls							
The phone calls provide me with some escape from the tough reality around me – I feel better able to cope							
I feel more connected to the library and that I am part of the library community because of the phone calls							
I have better knowledge about the library services and other local support because of the phone calls							
I miss the library - the phone calls remind me of what I am missing out on							

**B. PLEASE INDICATE TO WHAT EXTENT YOU AGREE THAT YOUR FAMILY (WHETHER THAT IS A PARTNER, CHILDREN OR OTHER) HAS EXPERIENCED THE FOLLOWING CHANGE AS A RESULT OF YOU RECEIVING THE PHONE CALLS.**

	STRONGLY DISAGREE	DISAGREE	SLIGHTLY DISAGREE	DON'T KNOW	SLIGHTLY AGREE	AGREE	STRONGLY AGREE
My family feel less worried about me because they know I have some support							

**C. OUT OF THE CHANGES THAT YOU HAVE EXPERIENCED, WHICH DO YOU FEEL ARE THE MOST IMPORTANT ONES FOR YOU? PLEASE SELECT UP TO THREE CHANGES**

	STRONGLY DISAGREE	DISAGREE	SLIGHTLY DISAGREE	DON'T KNOW	SLIGHTLY AGREE	AGREE	STRONGLY AGREE
I feel that I am cared about and valued							
I feel less lonely							
My mood is lifted and I feel less anxious							
I have some escape from the tough reality around me - I feel better able to cope							

**D. DO YOU THINK YOU HAVE AVOIDED USING ANY OF THE NHS SERVICES DUE TO THE SUPPORT YOU HAVE RECEIVED FROM THE LIFELINE SERVICE?**

Yes  No  If yes, which NHS service are you referring to? \_\_\_\_\_

**E. ARE THERE OTHER CHANGES OR OUTCOMES THAT YOU FEEL YOU HAVE EXPERIENCED AS A RESULT OF THE LIFELINE PHONE CALLS THAT ARE NOT INCLUDED ABOVE?**

**F. DO YOU HAVE ANY OTHER FEEDBACK OR COMMENT YOU WOULD LIKE TO MAKE?**

### iii. THE MARKET RESEARCH SOCIETY CODE OF CONDUCT

The aim of the Code of Conduct is to ensure that professional standards are maintained at all stages within the evaluation process. The fundamental principles concerning interviewers and underlying the MRS Code of Conduct are:

- Research/evaluation is founded upon the willing co-operation of the public
- Research/evaluation should be conducted honestly, objectively and without unwelcome intrusion/harm to participants
- The rights of participants are paramount

Key points of the Code of Conduct:

- Participants must not be misled when being asked for cooperation to participate in research/evaluation.
- A participant's right to withdraw at any stage must be respected.
- Evaluators must ensure that the following are clearly communicated to the Participant:
  - the name of the organisation undertaking the research/evaluation (if being conducted by an external researcher/evaluator).
  - the general subject of the research/evaluation
  - the purpose of the research/evaluation
  - if asked, the likely length of the questionnaire/interview/evaluation activity.
- Participants must not be unduly pressured to participate.
- Researchers/evaluators must delete any responses given by a participant, if requested, and if reasonable and practicable.
- Organisations and researchers/evaluators must not reveal to any other participants the detailed answers provided by any respondent or the identity of any other respondent participating in the evaluation.
- Respondent right to anonymity and confidentiality: the anonymity of participants must be preserved unless they have given their informed consent for their details to be revealed.

The latest published code is here: [Market Research Society code of conduct](#)

### CONTACTS

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**SUFFOLK  
LIBRARIES**

**WHERE  
I BELONG**

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