RAILS Member Visits Evaluation
Preliminary Report
October 2017

Background

In 2016, the RAILS Board expressed interest in RAILS evaluating the impact of our programs/services on our member libraries. While RAILS consistently tracks activities related to our programs/services, such as number of continuing education workshops offered and attendance at those workshops, number of visits to member libraries, number of networking group meetings (and attendance), number of eRead Illinois libraries and circulation figures, etc., we have not established a formal, systematic process to measure what impact all of these activities have made in our members working lives.

In September 2016, Rebecca Teasdale, a librarian who left the field to study evaluation and the value/impact of library services, gave a presentation to the board on different evaluation methods and offered suggestions on how RAILS might undertake an evaluation project. She also gave a presentation to the staff executive team and discussed possible programs/services for an evaluation pilot project. RAILS chose member engagement and more specifically member library visits as our first project.

In measuring the impact of member visits, we are focusing on changes that occurred as a direct result of the member visits, including changes in:

- Knowledge – For example, members indicate learning about programs/services during the visit that they did not know about before
- Behavior – Members use programs/services after the visit that they didn't use before, or they make additional use of these services because of the visit. Another behavioral change could be members who had never contacted RAILS before contacting the system with questions or for further information because they have established a relationship with the RAILS staff member making the visit.
- Attitude – Members could indicate feeling more engaged with RAILS as a result of their member visit, or believe that RAILS cares about them and their particular situation because RAILS staff took the time to visit.

In other words, we are looking at what members do differently as a result of the visit and if they are better off after receiving a member visit than they were before.

This evaluation report covers the time period from April 1, 2017 through October 4, 2017 and includes an examination of visits made to 58 RAILS member libraries. Because RAILS plans on continuing to evaluate member visits using the process below, and to continually make improvements to the member visit program and evaluation process, this document is intended to serve as a preliminary status report.

Member Visits Evaluation Process

Each year, RAILS staff members visit at least 20% of our member libraries. General guidelines for determining which libraries to visit include:

- Libraries that haven't been visited in the past two years
- Libraries with new library directors (past six months)
- Libraries that appear on the "unexpected outcome list" connected with our annual certification process
- Academic, school, and special libraries, since these types often know the least about RAILS programs/services
- Libraries that request a visit

RAILS has a number of goals and objectives for our member visits. For the purpose of this evaluation project, we chose to focus on the following:

- Educate members about RAILS programs/services
- Encourage members to use RAILS programs/services of particular value to their specific library
- Create an internal process for scheduling/planning/promoting member visits that is as efficient and effective as possible and helps RAILS to achieve our goals/objectives

RAILS is using a formative evaluation process to evaluate our member visits. This method is designed to provide information to improve an ongoing program/service to make sure it is as beneficial as possible to program recipients and that it is having an impact on those recipients. It is often useful to include staff directly involved in the particular program/service in this type of evaluation, as they will know the most about how the program works and are already heavily invested in its success.

The RAILS staff on our member visit evaluation team include:

- Debbie Baaske, Member Engagement Manager. One of Debbie's primary job functions is to visit member libraries of all types (academic, public, school, and special) throughout the RAILS area. Though other RAILS staff make library visits, this project focuses on Debbie's member visits.
- Jody Rubel, Administrative Assistant. Jody schedules member visits, communicates with the libraries involved, and tracks which RAILS libraries have been visited on an ongoing basis.
- Mary Witt, Communications Director. Mary is responsible for setting the overall direction of the member engagement program, which includes member visits. Since she is not involved in making visits on a day-to-day basis, she is also serving as an "impartial observer" during the member visits evaluation process.

Formative evaluations focus on gathering information to answer a limited number of open-ended questions and generally include in-depth data collection activities for each. The questions relate to project goals/objectives and should be specific, concrete, and measureable. The evaluation team chose the following questions which are related to the goals/objectives listed above:

1. Do members know more about RAILS programs/services as a direct result of the member library visits?
2. Have member visits resulted in increased use of RAILS programs/services?

3. How can we improve our process for planning, scheduling, and implementing member visits?
4. How can we promote member visits more effectively so that more members will be interested in having a visit?

Data Collection Methods Used to Answer the Evaluation Questions

The following are data collection methods (sometimes overlapping) that the evaluation team used to answer each of the four evaluation questions.

Do members know more about RAILS programs/services as a direct result of the member library visits?

As a general rule, project evaluations are stronger when data is collected during two different points in time: before the project activity begins and after. To measure what RAILS programs/services library staff knew about and/or used prior to the visit, the team developed a brief pre-visit checklist of key RAILS programs/services and asked the library director to indicate which programs/services they had used/knew about, and to return the checklist before the visit occurred.

In addition to providing baseline data, the checklist also gave library staff an idea of what would be covered at the visit as well as a reminder of all the different programs/services RAILS has to offer. The completed checklists gave RAILS staff the opportunity to focus the upcoming visit on programs/services the member in question was not familiar with or had not yet used.

As soon as possible after the visit, the RAILS staff member making the visit (Debbie Baaske) recorded any substantive observations or feedback about the visit, including:

- What RAILS programs/services library staff showed an interest in during the visit
- How enthusiastic and engaged staff appeared and sounded (facial expressions, tone of voice, etc.)
- If staff did not seem enthusiastic/engaged, did they give an extenuating reason, such as having a bad day, illness, etc.?
- What "new" programs/services staff indicated they would investigate further or likely use in the future.

In addition to having the pre-visit checklist as a guide, it usually came up during the course of the visit which RAILS programs/services library staff did not know about and which programs/services they would possibly use in the future.

Have member visits resulted in increased use of RAILS programs/services?

The evaluation team sent a post-visit checklist to the library director of each library visited two months after the visit asking them to indicate which programs/services staff had used as a direct result of the visit. We compared the post-visit checklist to both the pre-visit checklist and the observations recorded after the visit.

The team also noted activities that could be easily observed and were indicators of member use of programs/services as a result of the visit. For example, if an upcoming networking event was discussed at the visit and the member showed interest in this event, we could fairly easily determine if the member signed up for that event. Sometimes members also contacted RAILS to tell us they had used a service discussed at the visit or to ask additional questions about it.

How can we improve our process for planning, scheduling, and implementing member visits?

The "impartial observer" (Mary Witt) was heavily involved in this part of the process. Since she was not involved in the day-to-day activities involved in scheduling and recording the visits, she could analyze those procedures with a fresh eye and make suggestions for improvements.

She also accompanied Debbie Baaske on a number of visits to observe the process, observe staff at the libraries being visited, and again make suggestions for improvements.

How can we promote member visits more effectively so that more members will be interested in having a visit?

When RAILS contacts libraries to schedule a library visit, members are sometimes unsure of the visit's purpose. Several members have also told us during the visit that they were a bit nervous and did not know what to expect. Some even thought that RAILS was trying to check up on them!

In answering this question, the evaluation team reviewed all current methods used to promote visits to RAILS members. Debbie Baaske also interviewed select members after the visit to get their ideas on how we could have promoted the visit more effectively.

Findings/Impacts

The following are specific findings about the impacts of our member visits for each of the four evaluation questions.

Do members know more about RAILS programs/services as a direct result of the member library visits?

Most of our information on the increased knowledge of RAILS programs/services came during the visits themselves. As mentioned previously, we were able to target the visits to discuss programs/services members indicated they had not previously used on their pre-visit checklists.

There were several RAILS programs/services multiple members were not familiar with prior to the visit that they were interested in exploring further. These included:

- BiblioBoard platform
- *Sparks* podcast
- Multitype collaborative grants
- CE Archives
- CE networking grants

Of the 31 libraries that completed a post-visit survey indicating programs/services used as a direct result of the visit, 24 said they visited the RAILS website after the visit to learn more about our programs/services. Since 25 of these libraries had also visited the website prior to their visit, this appears to indicate that something occurred during the visit to spark their interest in finding out more about RAILS programs/services.

Some members we visited knew virtually nothing about RAILS, especially nonpublic library members. Whether or not these libraries use our programs/services in the future, at least we knew they had a basic knowledge of those programs/services as a result of the visit.

In one case, not only did we make the library more aware of our programs/services, this increase in knowledge also extended to a library patron when one of the library directors asked Debbie Baaske to speak to a patron about delivery.

In addition to indicating awareness of current RAILS programs/services, two libraries mentioned that they are interested in seeing what we do with our upcoming museum pass program. (This program was not included on the pre or post-visit checklists.)

Have member visits resulted in increased use of RAILS programs/services?

Of the 58 total libraries visited between April 1, 2017 and October 4, 2017, 31 libraries completed the post-visit checklist by the time this report was compiled. (Libraries were asked to indicate on this checklist only those RAILS programs/services they had used as a direct result of their visit.)

Table B at the end of this document shows the number of libraries that used specific services as a direct result of their library visit. Since libraries complete this checklist two months after their visit, RAILS anticipates receiving additional post-visit data on an ongoing basis in the future.

For some, the member visited resulted in enhanced connections with other libraries as well as possible increased use of RAILS programs/services. For example:

- A few directors did not know about the RAILS "Directors Only" mailing list and the enhanced knowledge they could gain by interacting with other directors via that list. At least one of these directors signed up for the list and posted a question following the member visit.
- One school librarian expressed feeling like she was in a vacuum. We told this librarian about an upcoming networking meeting where other school library staff would be present as well as how to watch for other networking opportunities in the future.
- One director expressed interest in RAILS multitype collaborative grants but didn't know if the school in her area was a RAILS member. We verified that the school was a RAILS member and the public library director contacted the school library about working together on a potential grant opportunity.
- One library director expressed interest in doing more networking and signed up for an upcoming member networking event and the RAILS member update – both of which the director learned about during the visit.
- Similarly, directors from two additional libraries registered for an upcoming RAILS member networking event that they learned about the event during their visits.

A few libraries had no interest in using RAILS programs/services and there was nothing that could have happened at the visit to change their minds. For example, one library had an extremely limited budget and very few staff members and was not interested in providing any additional programs/services to library patrons beyond those already being provided.

RAILS programs/services were not relevant to two special library members due to the specialized needs of their customers. (One of these libraries does make great use of the RAILS Jobs Board, which was not listed as a service on the pre or post-visit checklist!) Directors of two special libraries were retiring and did not know what would happen to the library after they left. A third special library director, though having no retirement plans, was concerned about the future of the library and had no need for RAILS programs/services at the current time.

In contrast, a number of the libraries visited were already using many RAILS programs/services. The fact that they did not use additional services because of the visit did not by itself indicate that the visit was not effective.

Some preferred to use the visit to talk about current issues/challenges they were having rather than learning more about RAILS programs/services. We filled an immediate need in those cases and the visit resulted in increased knowledge for the library staff member, even though it was not an increased knowledge of RAILS programs/services.

Many of the other libraries that had no need to use RAILS programs/services (or additional services) still received great benefit from the visit as noted in the Additional Impacts section below.

How can we improve our process for planning, scheduling, and implementing member visits?

Taking the time to focus on member visits in depth helped the evaluation team think of ways to improve the process. For example, as already mentioned, implementing the pre-visit surveys gave us an opportunity to focus the visit on the programs/services that would be of most interest to the member involved.

RAILS has the long-term goal of ensuring that all staff members at all RAILS libraries know about our programs/services, not just the library director. Though we always invited additional staff to participate in the visits, we intensified this effort during the evaluation project. We strongly encouraged library directors to include other staff during the visits, and also added a question to the pre-visit survey asking how many staff would participate. This served as a reminder that all were welcome to learn more about RAILS.

Traditionally, we have taken a RAILS folder loaded with flyers/handouts on our different programs/services to each visit. The folders can be overwhelming to some and we have learned via our conference booth experiences that many members do not want to be loaded down with paper. We started taking the new RAILS brochure and the most recent edition of our *What's New at RAILS?* flyer, and thus far, the members we visit seem to be reacting well to this change. This also saves time and creates a more efficient process on the RAILS staff end.

It has proved difficult to get libraries to return the post-visit survey. To aid in this effort, we reminded them during the visit to watch for the survey in two months' time and to fill it out when received. We also decided to have Jody Rubel send out the post-visit survey, rather than Debbie Baaske (the person

who made the visit). Judging from comments written on post-visit surveys we received, we suspected that some did not want to say anything that might appear even remotely negative "in front of" Debbie.

How can we promote member visits more effectively so that more members will be interested in having a visit?

As mentioned above, Debbie Baaske interviewed select people she had already visited regarding ways we could promote the visits more effectively. We received some very helpful suggestions, including:

- Don't call it a site visit. A site visit may suggest program or accreditation review. Call it a welcome visit (when visiting new directors) or give it a name like "meet and greet" your RAILS representative.
- Make it clearer what the visit will entail and what if anything the library needs to do to prepare in advance. For example, clarify whether the visit is supposed to be a conversation or a presentation, or both.
- Offer some sort of freebie for having a site visit
- Mention new programs or new features about long-time programs in targeted publicity so more experienced members will be more willing to set up a visit
- Publish testimonials from libraries that were visited in the *RAILS E-News*
- Other suggestions for possible language to use: "We have so much to offer and would love to visit and talk to you about all of the learning and collaborative opportunities available to members" or "We want to see all the great things you are doing in your library."

The evaluation team also thought of these possible improvements as a result of the evaluation analysis:

- To encourage more staff at a library to participate in the visit, add a sentence or two to the initial email explaining why inviting other staff would be beneficial to them. Re-enforce this message in the visit confirmation email.
- Often new directors want one-on-one time and don't necessarily want their staff to participate in the visit process. They may not want to appear "stupid" or unknowledgeable in front of their new staff or they may want to talk about staffing and other sensitive issues. RAILS could offer a "two-parter" and meet separately with the director, followed by any interested staff.
- Develop an easy way for members to request a visit via the RAILS website. (RAILS has since implemented this suggestion and has already received a request for a visit via the website.)

Additional Impacts of Member Visits

Though we initiated this evaluation project primarily to measure whether member visits resulted in increased knowledge and/or use of RAILS services, we discovered an outcome of equal importance during the process, namely, the visibility and good will generated by the visits. Though all of the 58 libraries visited thanked us for coming to see them, at least half of them also made it a point to emphasize how happy and excited they were that we were conducting the visits, whether or not they thought they could make future use of RAILS programs/services.

These libraries expressed comments like these either during the visit or on the post-visit checklist:

- *It's really good for RAILS staff to come to libraries to meet with people face to face. Online communications are great, but do not build relationships.*
- *We are so excited you are here! No one from RAILS has ever visited us before.*
- *The personal connection is worth a lot.*
- One library felt that RAILS was ignoring their area of the system and this attitude changed as a result of the visit.

The visits also provided an opportunity to hear feedback about RAILS programs/services that we otherwise might not have heard. Over 21 libraries provided specific feedback on different programs/services. For example:

- Several libraries did not know that RAILS was offering free exhibit passes to the American Library Association conference and many staff members from those libraries were able to attend the conference as a result.
- Several libraries were very happy with the webinars RAILS offers and the fact that we archive the webinars on our website – particularly since it is so hard for some staff to ever leave their library.
- At least two directors had high praise for Directors University and the number of connections made there.
- At least two directors commented on the importance of trustee training to their libraries.
- A few members commented on the importance of the *RAILS E-News.*
- Several directors said they were happy with the RAILS email lists and they encourage their staff to use them.
- Several library staff members gave suggestions for future CE programs.

The visits also gave some libraries the opportunity to discuss major problems they were having or to ask questions they otherwise would not have contacted RAILS to ask. For example:

- One library was having issues with their board and appreciated having someone to talk to about these issues.
- One library director needed help with their per capita application and mentioned this during the visit. A RAILS staff member contacted the director after the visit to help.
- Another library had questions about interlibrary loan and whether they could be doing it more effectively – advice was provided during the visit.

The visits also provided an opportunity to form future partnerships/alliances with our members and RAILS staff will follow-up on these possibilities. Chances are we would have never discovered these opportunities had we not made the visit. For example:

- At least two libraries said they were willing to host RAILS CE in the future
- At least seven libraries said they were willing to host a RAILS member networking group in the future – two of these libraries have already hosted events as of this writing.
- At least three special libraries volunteered to do a RAILS CE workshop or webinar

Recommendations

The following are recommendations for moving forward with evaluation at RAILS, both in general and for each of the four member visit evaluation questions.

General

- Build a culture of evaluation at RAILS and make evaluation part of our day-to-day activities
- Establish formal goals for all new initiatives to ensure that ongoing evaluation activities reflect those goals and objectives

Do members know more about RAILS programs/services as a direct result of the member library visits?

- Continue to collect pre-visit checklist data prior to member visits
- Continue to try to get as many staff members at a library to participate in the library visit as possible. If only the director chooses to participate, strongly encourage him/her to share information gleaned with other staff.
- Examine current methods to promote programs/services members indicate being most unfamiliar with and the possible reasons why members are less familiar with those programs/services, e.g. the program/service is new, RAILS is targeting the wrong audiences with our publicity, etc.

Have member visits resulted in increased use of RAILS programs/services?

- Continue to collect post-visit checklist data two months after member visits and use this data as an ongoing part of the member visit evaluation process
- Explore ways to easily track all member encounters with RAILS in once place (subscribed to *E-News*, attended CE program or member networking event, utilized RAILS e-resources, etc.) so we can more easily track actions that occur after a member visit

How can we improve our process for planning, scheduling, and implementing member visits?

- Continue to examine all processes involved in planning, scheduling, and implementing member visits and don't hesitate to try different methods to improve efficiency/effectiveness

How can we promote member visits more effectively so that more members will be interested in having a visit?

- Take a "lighter" touch in promoting member visits
- Customize email messages offering a visit to specific libraries as much as possible
- Develop formal talking points for promoting visits to members and share with all RAILS staff
- Be more detailed about what will happen at the visit – we'll sit down with you and have a chat about RAILS programs/services, which ones might be most beneficial to your library
- Publicize member visit form on RAILS website via *RAILS E-News, What's New at RAILS* flyer, and other means

- Make "why does RAILS conduct member visits" a member question of the month in weekly e-news
- Make "what happens on a member visit" a member question of the month in the *RAILS E-News*

Conclusion

Though we will continue to evaluate visits to RAILS member libraries on an ongoing basis, we have already proven the impact of the visits on our members as described above. We have increased member knowledge of RAILS programs/services as evidenced by their comments during the member visits coupled with what they reported on their pre-visit checklists. We have impacted their behavior as evidenced by their reported use of programs/services they have not used before on their post-visit checklists.

Perhaps most importantly, we have impacted members' attitudes about RAILS. Many of those visited report feeling more engaged with the system and they believe that RAILS cares about them and their particular situation.

Member visits have also proved to have as much of an impact on RAILS as they have on our member libraries. They have increased our knowledge of our members' needs and challenges and have helped us tailor our services to match those needs and challenges. They have helped us provide additional programs/services through the relationships/partnerships we have formed. And they have helped us improve our current line-up of programs/services through feedback we have gained talking with our members face-to-face.

Table A
Participating Libraries by Type

Library Type	Number of Participating Libraries
Academic	7
Public	31
School	8
Special	12
Total	**58**

Table B
Member Visit – Pre and Post-Visit Checklist Data
April 1 – October 4, 2017

The following information gives a general indication of programs/services used by the 31 libraries that completed post-visit surveys. There is not a direct correlation between the pre-visit and post visit numbers. Four of the libraries did not complete pre-visit surveys. In addition, some of the post-visit numbers may reflect actions taken by more than one staff person at the same library.

Members were asked to indicate usage of a program/service on the post-visit survey ONLY if they had used that program/service as a direct result of the visit. In some cases, the same member may have used the same program/service both prior to and after the visit. For example, the numbers appear to indicate that most libraries visited the RAILS website after their visit to find out more about something they had learned, in addition to visiting the website at some point prior to the visit.

In other cases, it is unlikely that a member would perform the same action both prior to and after the visit. For example, they would be unlikely to subscribe to the RAILS E-News twice, unless they encouraged someone else on their staff to subscribe. Since most already knew about delivery before the visit, they did not start using delivery as a direct result of the visit.

Action Related to RAILS Program/Services Following Member Visit	Pre-Visit	Post-Visit
Visited RAILS website to learn more about programs/services	25	24
Registered for or attended CE workshop	21	8
Viewed recorded CE event via RAILS CE Archives	11	9
Subscribed to *RAILS E-News*	22	15
Subscribed to academic, school, or special e-news	4	5
Took part in RAILS discount/group purchase or requested info	12	8
Signed up for eRead Illinois or requested info	11	6
Investigated a BiblioBoard Library product	6	8
Registered for RAILS member networking event	13	11
Listened to a *Sparks* podcast	7	7
Applied for/requested info on multitype grants	3	3
Applied for/requested info on CE networking group grants	5	1
Signed up for RAILS email list	16	6
Used RAILS delivery	19	0
Used a RAILS shared online catalog (LLSAP)	13	0
Used L2 calendar/member directory	19	3
Shared visit information with other library staff	N/A	22