

What Does Success Look Like?

Do Special Librarians Recognize Success When They Achieve It?

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Introduction

Building on our prior years' SLA Hot Topics sessions, "Adapt, Act and Thrive", "Building the Resilient Library", and the themes drawn out during last year's equally successful session, "Doing More with More," at this year's Special Libraries Association conference we sponsored the fourth in our discussion series on library sustainability, where we posed the question: "What Does Success Look Like?"

Special librarians know that to ensure sustainability they must build into their strategy the principles of access, discovery, integration, independence, security, and partnership with other key functions. Today's librarians embrace change, and even create it. They know that the path to success includes doing more with the tools they have, and the skills they've built. But do special librarians truly recognize success when they achieve it? Equally important, do they focus on communicating the value of their success to leadership and peers?

During this year's Hot Topics session, moderator Stephen Abram and our panelists discussed important questions, such as:

- What are the characteristics of a successful special library?
- How do you know when you are successful?
- How do you make sure others know you are successful?
- How do you communicate the value of success?
- What are the benefits of success?

They covered topics such as alignment with the strategic objectives of your organization; metrics and measurement (quantitative and qualitative); managerial reporting; storytelling, branding and marketing.

This whitepaper presents information shared during the event, combined with additional valuable insights gained from panelist interviews conducted in preparation for the discussion.

Presenters

This year's participants in our panel "What Does Success Look Like?" were:

- **KAREN SLOAT**—Senior Project Consultant, **American Academy of Facial Plastic & Reconstructive Surgery (AAFPRS)**
- **MEGAN SMITH**—Knowledge Services Manager, **American Physical Therapy Association (APTA)**
- **RUSSELL ROKICKI**—Library Operations Manager, **Duane Morris LLP**

Moderator Stephen Abram, CEO, Lighthouse Consulting, facilitated the discussion—adding perspectives drawn from his own distinguished career as a special librarian and consultant to the information sector.

Organizations Represented

AMERICAN ACADEMY OF FACIAL PLASTIC AND RECONSTRUCTIVE SURGERY

The American Academy of Facial Plastic and Reconstructive Surgery (AAFPRS) is the world's largest specialty association for facial plastic surgery. AAFPRS volunteer surgeons operate on thousands of patients worldwide, particularly children, providing pro bono care to those suffering from facial deformities, offering individuals the opportunity to overcome the physical limitations placed on them by circumstances beyond their control – deformities at birth, domestic violence, and war.

THE AMERICAN PHYSICAL THERAPY ASSOCIATION

The American Physical Therapy Association (APTA) is a national professional organization with a \$45.5 million budget representing more than 95,000 members. Its goal is to foster advancements in physical therapy practice, research, and education. APTA is headquartered in Alexandria, Virginia, with more than 180 employees serving APTA members.

DUANE MORRIS LLP

Duane Morris LLP is a Philadelphia-based law firm with more than 800 attorneys in 28 offices, practicing in the U.S., U.K. and Asia. The firm serves a broad array of clients worldwide and provides innovative solutions to legal and business challenges.

Insights and lessons learned

Recognize and celebrate the “Ah-Ha!” moments

To begin the session, each of our speakers described a moment when they realized that their departments or projects were indeed successful.

Megan Smith of APTA described her department’s proactive approach to historical preservation and promotion of the Association, in the context of the organization’s centennial anniversary.

“Suddenly, our leadership and our members became very interested in the history of the organization and how to start preparing for and celebrating this anniversary. An executive vice-president approached me and asked if I could give him an update of all the things we have related to historical preservation and promotion—within a matter of minutes, I was able to put together a pretty robust list of all these things that we’ve been doing, and he was visibly relieved that somebody had been working on them. For me, it was an “aha” moment because I realized that you have to be prepared to talk about what you do and communicate what you’re working on at a moment’s notice—especially on those things that are very behind-the-scenes and don’t always have a spotlight on them. We’re not always reporting this type of information up the chain of command, but that doesn’t mean we shouldn’t be measuring it and reporting it when it’s needed. Our leadership was able to go back to our membership and each other and say, “We’re really well prepared for this anniversary. We’re doing all this. We have people here who are good stewards of the work that our members and our organization have been doing for the last hundred years.”

Karen Sloat of AAFPRS described a moment when one of the reconstructive surgeons she works with wrote an article for JAMA, the *Journal for the American Medical Association*, about the database she built to capture patient data and support grant submissions.

We wanted to build something where we could capture information because we want to expand our programs, because our doctors pay for everything, and we wanted to establish a fund where we could help them defray some of the costs. If any of you have ever tried to get money from any organization or a foundation or a grant, you know have to have data. We did not have that. We had a lot of paper stacked in the corner.

We decided to move forward with developing a database to capture patient information, so when we go on trips overseas, they come back and they give me the information and we upload it. My “aha” moment had to do with one of our physicians who helped me build and test and design the database—we had three doctors who worked directly with me to make sure that the elements that we were capturing were meaningful and were going to get us what we needed.

He used information from and about our database to write an article, and he was published in what is called “JAMA,” which is the Journal for the American Medical Association. It’s the JAMA for facial plastic surgeons, which is probably the most prestigious journal for our physicians. He wrote an article about the database and how we were going to use the information for patient outcomes. That was kind of like “aha”, see? It did make sense to do this—because everybody is always asking, “Is this really worth the money? Is this going to do anything for us?”

The fact is that he was published and it’s gotten us that much further, and we are at a point now where we’re actually using the data to write grants. I have submitted three in the last couple months, so our hope is that we’re going to get more funding so we can support more doctors.

For Russell Rokicki of the law firm Duane Morris, his “ah-ha” moment came when he was visiting one of the firm’s branches.

We’re a very large firm, but our library is centralized, so a key part of my job involves getting out and visiting a lot of different offices. I was doing one of my first visits in New York, and I made an appointment to see one of our more prestigious partners. I went in, introduced myself and told him I’m from the firm’s library. He said, “Oh, I didn’t even know we had a library!” which obviously, he said jokingly. But we talked and we went over some of the projects he was working on and some of the tools he was using, and I gave him a little on-the-spot training.

Toward the end of our conversation, he said, “Oh, do you know Sonia?” and I told him that our research librarian Sonia and I work very closely together. And he said, ‘She really helped us with a client problem we had last week,’ and that, to me, was an “aha” moment. Because it proved that our message of “Library as a Service” is getting through to the lawyers in the firm. We may no longer be a destination but they are relying on our services more than ever.

Characteristics of a successful special library

During the group discussion on the characteristics of a successful special library, some common themes emerged. A mention of organizational culture included, for Russell Rokicki, an acknowledgement of the importance of “top down” expectations, where firm leadership uses, values and supports the library—both financially and in terms of advocacy. Panelists Ms. Sloat and Ms. Smith raised the issue of ensuring end user involvement and engagement at the “development” stage – that time when you’re building new products or services and testing them to make sure they fill needs and requirements. Adaptability was cited by everyone as critical, and all agreed that being mission driven is essential. This is more than simply tying your departmental activities to the organizational mission (although that’s very important); it means having your own mission as a librarian and a library. Per Ms. Smith, “... on a personal note, I’ve been at my organization for seven years. I’ve had four titles, five bosses, and been in five different departments. But I have never not felt like a librarian or felt like I wasn’t working in a library or doing information work. It’s all in that overall mission—that’s what drives your work and helps you remain successful”.

- Cultivate and enjoy top-down advocacy
- Involve and engage your end users early and often
- Stay adaptable
- Stick with your mission

What is the magic sauce in aligning yourself with your overall organization strategy?

While having your own mission as a librarian is important, it’s equally important to remain aligned with your organization’s strategy. Special librarians don’t work for libraries; they work for organizations that are, as Stephen Abram put it, “in the business of something else.”

Per Mr. Rokicki, “...the firm level goal is simply to serve our clients. We have a very strong executive group and they make sure that all the departments know what the goal is, so everything we do every day is in service of our clients. We focus on that, and we try to keep it simple.” He also mentioned that librarians are very good bridges to other departments, such as IT and HR, working on shared projects that support the firm’s goals.

Ms. Sloat’s goal at AAFPRS is to collect, maintain, and report on the evidence needed to support the Academy’s mission to

attract more physicians and more funding. This has doubled their annual trips into the field and increased number of patients helped from 187 to 1,700 within three years.

At APTA, “...sharing information, data and knowledge is central to the organization’s mission, so we’re kind of built into the strategic plan”, remarked Ms. Smith—but she states that it’s important to be really prepared when opportunities for impact arise, and to regularly communicate that the work the library does is central to transforming the Association.

- Keep it simple
- Collaborate with other departments to demonstrate impact beyond the library
- Measure and report
- Understand what it means to be transformational

How do you know when you are successful?

There are many moments when evidence of your success presents itself. Our panelists shared several from the daily round; for example, APTA’s CEO, who is a Physical Therapist, used the word ‘taxonomy’ in a meeting.

Per Megan Smith “... if we’re able to articulate clearly what we do to non-library professionals to the points where they’re actually comfortable using our terminology, I think we’ve been pretty successful! We’ve also had senior leaders stand up in meetings and talk about the impact we’ve made on their work or how we’ve been invaluable to a project’s success. We’ve also had some of the projects that we started and helped grow become so embedded in the organization’s products and services that they’re part of our member value statement or our member package. They’re marketed really heavily and branded really heavily, and it’s great to see something that started with the library become one of the central selling points of the organization.”

At Duane Morris, they know they’re successful at budget time. Despite what you hear about libraries facing shrinking budgets and layoffs, after 7 years with the firm, Russell Rokicki has seen budgets going up with at least inflation every year; “...we keep a close eye on the budget and have been effective in keeping costs flat by diligent review of renewals all while still offering best of breed resources for the lawyers. We do not wait to be asked to reduce costs.”

For Karen Sloat, user engagement demonstrates success. “If AAFPRS physicians and other stakeholders are using the database and the data, and not only using it, but telling us how

we can make it even better, that tells us we're successful."

- Cultural change
- Advocacy in public
- Library is considered a central selling point for the organization
- Financial resources and growth

Metrics and measurement

Stephen Abram spoke about measurement and reporting being valuable as communication tools and mentioned the downside of computerized systems is that you can count everything—which is overwhelming to your audience, especially without interpretation. He asked the panelists how they make choices about which quantitative and qualitative information to share.

For Karen Sloat at AAFPRS, the answer is once again tied to the Academy's main mission: to increase the number of physicians involved and serve more patients. "If we can use statistics to show an increase in the number of physicians that are involved in our three programs, and therefore an increase in the number of individuals we support through our programs, I can't get a better metric or measure than that."

"In terms of qualitative information, to accord with privacy laws, we put together encrypted information, and implemented ways to make sure that the only physician who can access patient information is the doctor who actually served those patients. We're able to do that through permission management based on roles. For example, when each doctor signs on, we can say, 'This doctor is a Guatemalan doctor and he went on our 2016 and 2017 trips' and only show the relevant information. This is really important to our funders, that we can demonstrate we operate in accordance with HIPAA laws."

For Russell Rokicki at Duane Morris, success stories are the best measurement of all, and much better than productivity measures such as numbers of requests, numbers of books, etc. "Firm leaders would rather hear a story about how we co-managed a project with the IT department and got all the right people involved and delivered a great result, and those kinds of stories. I think that's more of a way to show our success to people; it's not so much about 'Oh, we're so busy;' although of course we do maintain those measures as well and put them into an annual report."

Panelists agreed that it's important to differentiate between metrics you share with leadership and those used operationally. Per Megan Smith, "...at APTA there are key performance

indicators (KPIs) set at the executive level and I monitor those monthly, and I have dashboards set up so that any time our numbers change I can see. We all keep the same baseline metrics that we need for management purposes to be able to allocate resources or adjust our services. But what I try to do when I communicate to management is take those baselines and analyze them in a way that shows how we're moving the needle. We've been marked as one of the programs in the association that's going to be really integral to transforming it—moving the association forward into the future. I really want to show how we're changing work, how we're changing the way people work, demonstrating that they're using information to make better decisions or that they're accessing it much faster. I'm not going to say we purchased 200 articles this year. I'm going to say 75% of our staff used self-service document delivery as opposed to going to the librarian for their acquisition."

- Tie metrics to the mission
- Don't forget qualitative measurements
- Tell stories of success
- Use numbers to support your message rather than as the message

How do you make sure others know you are successful?

It's great for you and the rest of the library staff to feel and know, based on external measures and feedback, that you are successful. However, it's critical to your ongoing sustainability that others know it as well. Our three speakers described their own preferred approaches to making sure others within the organization see the libraries' value.

For Megan Smith, it involves engaging stakeholders in a way where her passion and sincerity really show through. "It's really through storytelling and personal interactions that we communicate our value. APTA is a very people-oriented organization, so that tends to be how we share messages with each other—face-to-face. When you love what you do and adamantly believe that the work you do makes the organization better, it's really easy to tell these stories about how you saved the organization time, how you convinced a member that their membership dues were worth it, that you actually helped your advocacy team with a policy win. It's sincere and people are really engaged by that kind of anecdote."

For AAFPRS, letting capital campaign donors know how their money is being used—and the impact it has—is critical. Per Karen Sloat, every physician who goes into the field writes an article when they come back, accompanied by photographs,

and including statistics on numbers of children helped, etc. The Academy uses various newsletters and other publication methods to let members know how the funding they provided is achieving the goals. “Once they understand exactly how the money they provided has been used, it makes a huge difference; it’s really important to them.”

Mr. Rokicki described a classic exchange: “When I travel, I might see a partner and say, ‘Oh, what do you think of that report?’ and they’ll say, ‘Oh, I didn’t know the Library put that together!’ So, I have to say, ‘Yes, the library delivers that report to you every single day, and you get business because of it.’ It’s important to get in front of them, show them your products and remind them of the services you provide—even though many librarians have a hard time taking credit.”

- Be passionate, share your stories
- Enable your sponsors to see impact, feel pride
- Take credit for your work

Branding and marketing

That exchange led naturally into Stephen Abram’s next question for the panelists: “What sort of branding and marketing techniques do you use?”

Continuing with Russell Rokicki, the issue of logistical challenges to came up. He mentioned that branding can be oddly difficult, because a change to delivering vendor-compiled aggregated content via email with the library as “sender” (with a new Duane Morris library logo) caused it to go to people’s spam. But, he said, branding is very important. “We have a central email address for both library and research services, and we do try to put our logo on everything we do.”

At AAFPRS, they consolidated their three program logos into one; said Karen Sloat, “We recognized that we need one picture to describe what we’re doing in total. It was the most difficult thing I’ve ever had to get 12 people to agree on. But we finally came up with one that expresses a single brand identity. And we do have a PR firm, and that’s great, because our physicians have been on programs like Inside Edition—which absolutely gets the word out and generates more funding.”

For Megan Smith and her APTA team, it’s often about word of mouth. Because they generate products that are incorporated into the organization’s overall marketing and branding and have built up such great relationships with staff, “... people credit the library when they’re presenting something that we found for them, or they’ll use an example of how something we sent them changed and improved their work. Then we have

a lot of people come up to us and say, “Well, so-and-so said I need to talk to you because you have something that I need or that I want.”

- Leverage technology as appropriate
- Reinforce your brand identity visually
- Welcome referrals

How do you communicate the value of success?

Communicating about your successes and marketing yourself and the library is certainly a challenge—but communicating the actual value of that success is also important. Success usually delivers some value, as opposed to effort (which is quite straightforward to communicate). Special librarians handle high request volumes, complete a lot of work, and manage lots of transactions. But what are some proven practices for delivering a value statement? What is value, and how big is it?

Megan Smith’s approach to this is asserting in her value statement that library services and products help the Association make more informed decisions, and better guide its activities and practices. “Usually I communicate that through a presentation, but we do include our value statement and/or mission statement in reports, too. In presentations, I always start out with real-world examples or case studies, again, where we saved somebody time or we’ve helped with a significant member win—and I use people’s names. I usually ask them, ‘Hey, I’m going to share your example with the leadership team today. Is that okay?’ I definitely use examples that all staff can relate to, and I think it encourages people to think about how they might be able to engage us to do their work a little bit differently, as their colleagues have done.”

At Duane Morris, much of the library’s value is in saving time and saving their clients’ money. Per Mr. Rokicki, “At the end of the day, money, because our services are certainly far cheaper than our attorneys’ services. If we’re saving the attorneys time—which we’d like to think we are—then we’re also saving our clients money. We try to demonstrate how we can save the attorney’s time.” For example, he reminded one attorney in the Atlanta office who was inundated with emails that the library can create customized newsletters so she can get her content all in one email, which delighted her. Small wins like this demonstrate value—but you have to communicate them “up the chain.”

Karen Sloat’s work with AAFPRS gave her an opportunity to see the value delivered, real time. She was able to go to one of their field sites in Peru and test her database in a live environment.

Although they built the patient information database in 2014, they had backloaded data from 2010, so Ms. Sloat was able to look up information on each patient and deliver their history on demand, to the attending physicians. While in the recovery room supporting the doctors, she overheard the mother of a three-month-old, just out of surgery, on the phone with her husband, saying “He is beautiful; he is normal.”

Per Ms. Sloat, “As I said, we work on children; most of them would never have a chance for a normal life if we didn’t get to do the work we do. So that moment is the kind of thing I want to talk about, the ‘ah-ha’ of it, and to communicate value through stories like these. We can say to our funders, ‘Here’s what you are helping us achieve. Here is what your money is doing. We’re going to be able to monitor this child over the coming years, and to use this case study to help others.’”

- Share relatable, real-world examples
- Small wins really add up
- Appeal to emotion
- Take the long view

What are the benefits of success?

Success brings with it many benefits, to the individual, to the department and to the parent organization. The panelists discussed some visible, tangible benefits from their own experience.

Per Russell Rokicki, “The benefits to the library are obviously the trust of the attorneys—and it’s kind of a virtuous cycle, because if you have that trust, you’re going to get more projects, and success is just going to build on itself. That, I think, is the biggest benefit. You have buy-in from the attorneys. You have buy-in from the administrators. As far as for benefits to the firm, those revolve around time and client development. We’re always coming up with new ways to save time, and to get new business.

For AAFPRS, the benefit is having patient information that they did not have. Per Karen Sloat, It’s data that they can use in a constructive way to achieve the Academy’s goals and build on their accomplishments. There is benefit in being able to leverage information to secure additional funding, which will bring in more physicians to serve more patients, and then also just as importantly, to track those patient outcomes.

Megan Smith remarked that “...we’ve proven how much time we can save for APTA with real-world examples and metrics, and that’s given us a lot of buy-in when we want to do other projects.

Shared Observations

Rounding off the session, our panelists offered additional insights, triggered by questions from the attendees.

Russell Rokicki pointed out the need for focus. “At Duane Morris we try to focus on our main things. Our things are research and delivering tools for the attorneys. We don’t get involved in competitive intelligence, big data, all of that. To ensure success, focus on what you’re good at—what you’re the best at.”

Per Megan Smith, personal relationships are key, especially with organizational leaders. At the time of the panel, APTA was beginning a restructuring; they created a brand-new unit called ‘Knowledge and Technology,’ putting the Library, the IT department and the Membership department together. Per Ms. Smith, “Having the word ‘Knowledge’ in the name of the unit speaks volumes about the work that we’ve been doing as the Knowledge Services program at the Association.”

Karen Sloat encouraged everyone to move past being shy about asking people who use your products and services if you can quote them, or if you can share their stories with management, or if they’d be willing to send a note to your boss or acknowledge the library in their research papers or articles.

A lot of succeeding has to do with being open to change or being a change agent. Per Ms. Smith, modeling the behavior you’re looking for or the process that you are trying to change is critical. An example from APTA is the library’s work with the social media team; Ms. Smith proposed they promote both the library’s archival assets and women’s history month because the Association was founded by women in 1921—and now they work together quarterly to develop social media posts that promote the history of physical therapy.

At Duane Morris, Russell Rokicki leverages every opportunity to promote the library as-and-when people are using its services, such as The Wall Street Journal online, or Practical Law. “Whenever I go to a meeting with somebody, because we have software that lets us track what people are using, I can say, ‘Oh, I know you’re using Practical Law. The library offers and supports Practical Law. You may not know it, but we’re the ones training you on Practical Law—so you definitely are using the library every day.’”

- Focus on what you're best at
- Build personal relationships with influencers
- Solicit solid and public advocacy
- Model the behavior you seek to encourage
- Collaborate in unexpected ways
- Capture people's attention in context

Conclusion

Special librarians work in many different environments, and the experience of each of our panelists demonstrates that success takes just as many forms. Do you know what success looks like for you and your library? You may want to recall some of your own "ah-ha" moments, and also consider the below:

"The mission of every librarian is to facilitate knowledge creation in their community. Sharing that mission at the programmatic level or the individual level within the library is essential—it allows you to be very adaptable, which I think is a major characteristic of a successful special library.

If you have this kind of overall mission, purpose and drive, you're not tied to one idea of what a library is or what it isn't, or what a librarian does, or doesn't do, which means that as the organization evolves and changes and its needs change, you're able to evolve and adapt with it—because what an organization needs this year may not be what an organization needs next year. Untie yourself from the idea that librarians have to buy books, liberate yourself from the notion that librarians don't do data analytics—that's the way to succeed and thrive in your organization."

Megan Smith,
The American Physical Therapy Association

About LUCIDEA

Lucidea is a knowledge management software and solutions company that provides the infrastructure and business process know-how to help information intensive organizations easily collect, organize, and leverage their corporate knowledge. Our products improve accessibility and use of information assets for the people who need this knowledge most – employees and customers – resulting in higher employee productivity, lower operational costs and increased customer satisfaction. With a global customer base of more than 2,300 active clients in more than 50 countries, Lucidea is the largest provider of knowledge management solutions to corporations, law firms, non-profits, government agencies, museums, and archives worldwide.

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