



Guidelines for undertaking a library review

Purpose

These guidelines have been produced to assist senior managers in organisations, governments, institutions, who are responsible for library and information services but may not come from a library and information background. They are designed to provide a good practice model for undertaking a service review, to achieve the best outcomes with the least disruption.

These guidelines should be read in conjunction with the ALIA guidelines for different types of libraries, available on the [ALIA website](#).

Introduction

Library reviews are a valuable way of assessing current performance and future opportunities. We recommend that internal reviews be carried out every 3-5 years and that an independent assessment be carried out every 5-7 years.

Scope and objectives

A review can range in scale from a 'health check' through to an in-depth study with the end goal of a major restructure. The review process can be challenging for staff and it is important for there to be clarity around terms of reference, why the review is being carried out and the possible outcomes. We recommend transparency and carefully structured communications with staff, library users and other stakeholders throughout the process.

Review panel

A good review panel will combine external independence with internal expertise. Panel members will approach the task with open minds and will gather evidence without bias towards a preconceived end result.



Timescale

Depending on the scale and the requirement for evidence-gathering and consultation, reviews should generally take 3-4 months.

Consultation

The extent of the consultation will depend on the scale of the review, but as a minimum we recommend seeking the views of library users and staff. Where there could be major changes as a result of the review, Unions, professional bodies, network partners, community organisations and other stakeholders should be given the opportunity to submit their views to the review panel.

We recommend a three-phase approach along the following lines:

1. Release of the terms of reference and a discussion paper
Minimum 2-week period for people to respond with comments
2. Evidence gathering and investigation
Minimum 4-week period for people to provide feedback to the panel or consultant (the format may be written submissions, focus groups, and/or a survey)
3. Exposure draft report
Minimum 4-week period for people to respond to draft recommendations

Communication

We recommend the development of a communications plan at the outset of the review process. The communications plan will be closely aligned with the consultation plan and both plans will be communicated to stakeholders at the start. The following is an example.

Stakeholders	Information	Channels	Responsibility	Timing
Users	1. Plan and TOR 2. Investigation 3. Draft report 4. Final outcome	Intranet Flyer in library	Panel secretary	Week 3 Week 5 Week 9 Week 12



Staff	0. Pre-brief	Meetings	Panel chair	Week 1
	1. TOR		Senior manager	Week 2
	2. Investigation			Week 4
	3. Draft report			Week 8
	4. Final outcome			Week 11
	5. Implementation			Week 12

Where the user group includes the public, or where the collection has special significance, there may well be media and/or political interest, and this should be factored into the communications plan.

Context

Any library service review needs to be carried out in the context of what is happening within the organisation. For special libraries, there needs to be an understanding of the future information needs of the users; for school libraries, the demands of the curriculum; for higher education and research libraries, the discoverability of data; for public libraries, the demographics of their communities, and so on.

It also needs to be carried out in the context of what is happening within the library sector – identifying developing service trends, new technologies, advances in management systems and business processes, both nationally and internationally.

Current performance

The performance of the library can be assessed using the following framework as a starting point.

Service model	
Library users	Regular needs assessment; feedback mechanism; service based on UX design; community engagement; customer satisfaction



Locations	Physical sites and virtual presence through website, intranet, social media platforms; opening hours and 24/7 digital access
Collections	Usage statistics; formats; collection development (in-house, third party and patron driven); negotiation with industry partners (print, digital and subscriptions to electronic databases); unique materials; digitisation and digital access to historic materials
Programs and services	Language and literacies, including information and digital literacy; IT skills; informal learning; literature reviews; reference enquiries; talks; information alerts; events and campaigns; tailored services specific to the organisation
Management	
Operations	Collection of data (statistical, narrative, case studies); effective use of library management system; investment in IT; reporting; review
Staffing	Number of staff; diversity; qualifications, knowledge and experience; skills and professional development needs
Partnerships and collaboration	Participation in interlibrary lending; contributing to Trove and Libraries Australia; active membership of professional bodies
Evaluation	
Key performance indicators (KPIs)	Performance against internal KPIs and industry standards and benchmarks



Return on investment	Value to the organisation; community benefits; comparison with the cost of an external service provider
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Future requirements

A review should not only assess the current performance of the library and information service but also look at the likely future requirements of users and how the service will need to adapt over time. While there may be opportunities for cost savings through the deployment of new technologies, it is also likely there will be a case for investment to achieve improved services and greater efficiencies.

Business as usual

Even the best review process can create a feeling of concern and discomfort among library staff and users. It is essential for the library and information service to keep running at its optimal level during the review, and for the panel to be conscious of the impact of its work on staff and community morale.

Summary

In summary, a good library and information service review will have the following features:

- An open-minded approach from the panel and from stakeholders
- A transparent and well communicated process
- Several opportunities for genuine consultation
- A reasonable timescale – not rushed, not dragged out
- It will be set in the context of what is happening internally and externally
- Recommendations will reflect the future requirements of users
- Every effort will be made to minimise concern and disruption.

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