**Benchmarking Framework for library services**

**Full (recommended) version**

**Version 1, September 2017**

**Introduction**

This Framework is designed to be an improvement and learning tool for library services. It brings together current principles of excellence and best practice.

The framework consists of two sections relating to:

1. the results of the library service (for example outcomes achieved)
2. how an excellent library service organisation should operate in order to achieve enhanced outcomes for local people

Self-assessment using the criteria in these two sections provides a comprehensive view of the progress of the library service and generates valuable improvement activity.

**Self-assessment methodology**

First you need to collate or review existing data relating to each of the areas in section one of this framework [(results achieved)](#2et92p0). Analyse trends using the criteria in section one and establish strengths and areas for improvement. If you don’t already collect data relating to any of these areas, don’t spend time collecting it at this stage. This could become an action within your improvement plan, which is only developed once the full self-assessment has been completed.

Self-assessment of your organisation’s progress in relation to the [characteristics of excellent library services (section two)](#3dy6vkm) is conducted by your self-assessment team through discussion. During these sessions use the following methodology:

* remind the team of the goal and nature of self-assessment.
* Ensure that every member of the self-assessment team has a copy of the framework and/or project it onto a screen.
* Ensure everyone in the team understands the characteristic that you are working on.
* When everyone is clear on the criteria for this characteristic, discuss what approaches you currently use or have planned. Write these on a flipchart.
* Summarise the data relating to the characteristic (see above)
* Using the evaluation matrix, discuss your progress and reach a consensus on ratings, and strengths and areas for improvement (aim to establish two to four of each).
* Write these on the flipchart, or type into the template and project this onto the screen.
* Move on to the next characteristic.
* When the self-assessment has been completed, document all the findings using the template.

**Section 1: results achieved**

* 1. **Desired strategic outcomes**

**Excellent library services achieve positive results relating to their desired strategic outcomes** [**(see characteristic 5).**](#17dp8vu)

This includes:

* measuring performance relating to strategic outcomes (eg surveys and user numbers)
* achieving positive trends over at least three years for the strategic outcomes
* linking these results to innovative service design and marketing and other organisational practices which have been implemented (eg community engagement and collaborative working)

**Strengths**

**Areas for improvement**

* 1. **User satisfaction**

**Excellent library services achieve positive results relating to the satisfaction of people using the services.**

This includes:

* measuring user satisfaction performance (such as user surveys)
* achieving positive trends over at least three years for user satisfaction
* linking these results to the design of the service and to organisational practices which have been implemented (for example leadership, process improvement and workforce development)

**Strengths**

**Areas for improvement**

* 1. **Workforce satisfaction, development and resilience**

**Excellent library services achieve positive results relating to the satisfaction, development and resilience of their workforce (including volunteers).**

This includes:

* measuring performance relating to the satisfaction, development and resilience of their workforce (for example, through staff surveys, data relating to learning and development, sickness absence, turnover and number of volunteers)
* achieving positive trends over at least three years for workforce satisfaction, development and resilience
* linking these results to organisational practices (such as leadership, and workforce management and development)

**Strengths**

**Areas for Improvement**

* 1. **Value for money**

**Excellent library services achieve positive results relating to the value for money that they provide.**

This includes:

* measuring value for money performance (for example income and investment generated and cost per head of population / users)
* achieving positive trends over at least three years on value for money
* achieving positive results compared with external benchmarks where relevant
* linking these results to organisational practices (such as management of financial and physical resources, innovation and collaboration)

**Strengths**

**Areas for improvement**

**Section 2: characteristics of excellent library services**

**Characteristic 1: leadership**

**Excellent library services are led by visionary, forward-thinking and self-determined leaders who are passionate about continual improvement and making a difference to the local community through the services they provide.**

This involves leaders:

* agreeing and communicating a clear and compelling purpose and vision for the library service
* establishing, communicating and acting as role models for a set of values which reflect the [Ethical Principles for Library and Information Professionals](https://www.cilip.org.uk/sites/default/files/media/document/2017/ethical_principles_for_library_and_information_professionals_october_2012.pdf)
* being powerful influencers and advocates for library services locally
* enabling and supporting continual development and innovation of library services, to meet changing needs and expectations of the community
* passionately seeking organisational, team and individual improvement, driving the organisation forward and being a role model of continuous improvement
* connecting to and building valuable relationships within relevant local public, commercial and civil society sector bodies.

**Relevant guidance documentation**

[Ethical Principles for Library and Information Professionals (CILIP: the library and information association)](https://www.cilip.org.uk/sites/default/files/media/document/2017/ethical_principles_for_library_and_information_professionals_october_2012.pdf)

[Libraries Deliver: Ambition for Public Libraries](https://www.gov.uk/government/publications/libraries-deliver-ambition-for-public-libraries-in-england-2016-to-2021)

[Delivering local solutions for public library services (Local Government Association)](https://www.local.gov.uk/delivering-local-solutions-public-library-services)

[Public Library Skills Strategy, 2017-2030](https://www.cilip.org.uk/about/projects-reviews/public-library-skills-strategy/public-library-skills-strategy-2017-2030)

[Longer-term, evidence-based sustainable planning toolkit](https://www.gov.uk/government/publications/longer-term-evidence-based-sustainable-planning-toolkit)

**Recommended data sources**

Staff surveys

Partner surveys

User surveys

Council consultation

Performance trends relating to outcomes and value for money

Service improvement plans and reviews

**What methods and practices do we currently have in place relating to this characteristic?**

**What is our current progress in relation to these characteristics? (tick the most appropriate box)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Evaluation element | 0 | 1 | 2 | 3 | 4 |
| Not at all | Just started | To some extent | To a large extent | Completely |
| **Plan**  To what extent has the organisation developed interlinked methods and practices which achieve the above characteristic? |  |  |  |  |  |
| **Do**  To what extent are these methods and practices implemented systematically across the organisation? |  |  |  |  |  |
| **Check / act**  To what extent does the organisation review and improve the effectiveness and efficiency of these methods and practices? |  |  |  |  |  |
| **Impact**  To what extent have these methods and practices achieved positive results for stakeholders? |  |  |  |  |  |

**Strengths**

**Areas for improvement**

**Characteristic 2: Governance and management system**

**Excellent library services have a soundly-based and transparent system of governance and operations, which meets legal requirements and enables library staff to deliver a high quality service for local people and achieve desired outcomes.**

This includes:

* complying with the Public Libraries and Museums Act 1964, including the retention of an explicit connection between national superintendence and local leadership
* complying with other legal obligations and guidance (for example, legislation and guidance relating to equality, health and safety, HR, data protection and child protection)
* establishing an organisational structure and management systems which enable long-term thinking and planning, innovative service development and effective day-to-day management
* using robust project management techniques to support change, improvement, facility development and delivery of the services
* assessing and managing risks to the organisation, and creating contingency plans
* establishing transparent decision-making processes, based on facts, in line with the needs of stakeholders

**Relevant guidance documentation**

[Libraries Deliver: Ambition for Public Libraries, 2016 to 2021](https://www.gov.uk/government/publications/libraries-deliver-ambition-for-public-libraries-in-england-2016-to-2021)

[The Public Museums and Libraries Act, 1964](http://www.legislation.gov.uk/ukpga/1964/75/contents)

[Equality Act, 2010; guidance](https://www.gov.uk/guidance/equality-act-2010-guidance)

[Management of Health and Safety Regulations, 1999](http://www.legislation.gov.uk/uksi/1999/3242/contents/made)

[Data Protection Act](https://www.gov.uk/data-protection)

[Working time directive](http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:32003L0088:EN:HTML)

[Working together to safeguard children](https://www.gov.uk/government/publications/working-together-to-safeguard-children--2)

[Longer-term, evidence-based sustainable planning toolkit](https://www.gov.uk/government/publications/longer-term-evidence-based-sustainable-planning-toolkit)

[Libraries: Alternative delivery models toolkit](https://www.gov.uk/government/publications/libraries-alternative-delivery-models-toolkit)

**Recommended data sources**

Partner surveys

Performance trends relating to outcomes and value for money

Service improvement plans and reviews

**What methods and practices do we currently have in place relating to this characteristic?**

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**Strengths**

**Areas for improvement**

**Characteristic 3: evidence-based decision making**

**Excellent library services base the design, delivery and development of their service on evidence, data, information and analysis of good practice from the UK and overseas.**

This includes:

* developing and maintaining an understanding of the present and future political, economic, social, technical, environmental and legal environment in which the library (service) operates
* developing and maintaining an understanding of the strategies of relevant national and local organisations and partnerships
* developing and maintaining an understanding of the socio-economics and demographics of the local community and relevant educational and health-related trends
* proactively seeking and learning from good practice from the UK and overseas
* evaluating the impact of programmes and projects and sharing learning widely across the sector
* monitoring, measuring, predicting and reporting performance in relation to the desired outcomes, user satisfaction, staff satisfaction, efficiency and value for money, and using this information to inform review and improvement [(see characteristic 10)](#1t3h5sf)

**Relevant guidance documentation**

[Libraries Deliver: Ambition for Public Libraries in England 2016 to 2021](https://www.gov.uk/government/publications/libraries-deliver-ambition-for-public-libraries-in-england-2016-to-2021)

[Joint Strategic Needs Assessment and joint health and wellbeing strategies explained](https://www.gov.uk/government/publications/joint-strategic-needs-assessment-and-joint-health-and-wellbeing-strategies-explained)

[Longer-term, evidence-based sustainable planning toolkit](https://www.gov.uk/government/publications/longer-term-evidence-based-sustainable-planning-toolkit)

**Recommended data sources**

Performance trends relating to outcomes and value for money

Service improvement plans and reviews

[LG Inform](https://www.local.gov.uk/our-support/benchmarking-data-lg-inform)

**What methods and practices do we currently have in place relating to this characteristic?**

**What is our current progress in relation to these characteristics? (tick the most appropriate box)**

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**Strengths**

**Areas for improvement**

**Characteristic 4: community consultation and engagement**

**Excellent library services are shaped by local needs and designed and delivered in partnership with the community, so their services are accessible and available to all who need them.**

This includes:

* developing and maintaining an understanding of the present and future needs and service expectations of all parts of the community
* proactively developing an understanding of the barriers that people face in relation to using the service, and finding ways to overcome these barriers
* proactively seeking, collecting and reviewing ideas from the community about how to develop and improve the service
* working in partnership with the communities it serves to develop and deliver the services (such as using Friends Groups)
* actively engaging young people in developing, using and promoting the service
* developing insight to people’s experience and perception of the service

**Relevant guidance documentation**

[Children and Young People’s Promise in Public Libraries (Society of Chief Librarians)](http://goscl.com/best-practice/childrens-promise/)

[Six Steps Promise (Society of Chief Librarians)](http://goscl.com/best-practice/six-steps-for-blind-and-partially-sighted-people/)

[Joint Strategic Needs Assessment and joint health and wellbeing strategies explained](https://www.gov.uk/government/publications/joint-strategic-needs-assessment-and-joint-health-and-wellbeing-strategies-explained)

LGA’s [New Conversations tool](https://www.local.gov.uk/new-conversations-lga-guide-engagement)

[Longer-term, evidence-based sustainable planning toolkit](https://www.gov.uk/government/publications/longer-term-evidence-based-sustainable-planning-toolkit)

Local Plan

**Recommended data sources**

User surveys

Community consultation

Performance trends relating to outcomes

[Taking Part survey](https://www.gov.uk/guidance/taking-part-survey)

**What methods and practices do we currently have in place relating to this characteristic?**

**What is our current progress in relation to these characteristics? (tick the most appropriate box)**

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**Strengths**

**Areas for improvement**

**Characteristic 5: outcomes-focused strategy and planning**

**Excellent library services plan the future service, so that they can achieve positive outcomes, a high quality service for the communities they serve (reflecting the** [**7 strategic Outcomes**](https://www.gov.uk/government/publications/libraries-deliver-ambition-for-public-libraries-in-england-2016-to-2021/libraries-deliver-ambition-for-public-libraries-in-england-2016-to-2021#Annex-1) **in** [**Libraries Deliver: Ambition for Public Libraries in England 2016 to 2021**](https://www.gov.uk/government/publications/libraries-deliver-ambition-for-public-libraries-in-england-2016-to-2021/libraries-deliver-ambition-for-public-libraries-in-england-2016-to-2021)**) and long-term sustainability.**

This includes:

* defining, agreeing and communicating desired outcomes and related performance measures for the library service, which reflect and contribute to the [7 strategic Outcomes](https://www.gov.uk/government/publications/libraries-deliver-ambition-for-public-libraries-in-england-2016-to-2021/libraries-deliver-ambition-for-public-libraries-in-england-2016-to-2021#Annex-1) in ‘[Libraries Deliver: Ambition for Public Libraries in England 2016 to 2021](https://www.gov.uk/government/publications/libraries-deliver-ambition-for-public-libraries-in-england-2016-to-2021/libraries-deliver-ambition-for-public-libraries-in-england-2016-to-2021)’, the local authority’s corporate plan, the strategies of key partners and local needs
* prioritising service development activities which will have the greatest impact on the outcomes and broader council priorities
* developing, communicating and implementing a long and medium term plan, which enables the service to achieve enhanced outcomes and to be sustainable, based on the identified needs and expectations of the community [(see characteristic 4)](#2s8eyo1) and research and measurement activity [(see characteristic 3)](#4d34og8)
* identifying the need for, planning, and managing, major change with a constancy of purpose, ensuring people are consulted and engaged in the process
* identifying, capturing and making use of the knowledge, experience and creative ideas from professional staff, volunteers and partners to inform the long and medium term plan
* monitoring progress with the long and medium term plan, reviewing its continuing effectiveness and making the necessary changes

**Relevant guidance documentation**

[Libraries Deliver: Ambition for Public Libraries in England 2016 to 2021](https://www.gov.uk/government/publications/libraries-deliver-ambition-for-public-libraries-in-england-2016-to-2021)

**Recommended data sources**

Staff surveys

User surveys

Performance trends relating to outcomes

**What methods and practices do we currently have in place relating to this characteristic?**

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**Strengths**

**Areas for improvement**

**Characteristic 6: collaborative working and enterprise**

**Excellent library services have an entrepreneurial and creative approach to building new service models and establishing a wide range of collaborations to achieve enhanced outcomes and sustainability.**

This includes:

* activelyexamining alternative delivery models which could unlock additionalinvestment and achieve enhanced outcomes
* proactively seeking and developing diverse and sustainable funding streams, including income generating activities, fundraising, grants and commissioning
* establishing collaborations with public, commercial and not for profit sector bodies to develop and deliver service offers
* creating synergy relating to vision, outcomes and values with partners
* collaborating with internal and external partners to improve efficiency, value for money and impact (for example through shared resources, joint service development, joint purchasing, joint commissioning and funding bids and shared back office functions)
* managing the relationships with partners, including risk and tension, to create sustainable collaboration

**Relevant guidance documentation**

[Libraries Deliver: Ambition for Public Libraries in England 2016 to 2021](https://www.gov.uk/government/publications/libraries-deliver-ambition-for-public-libraries-in-england-2016-to-2021)

[Libraries: Alternative Delivery models toolkit](https://www.gov.uk/government/publications/libraries-alternative-delivery-models-toolkit)

[Longer-term, evidence-based sustainable planning toolkit](https://www.gov.uk/government/publications/longer-term-evidence-based-sustainable-planning-toolkit)

[Community managed libraries: good practice toolkit](https://www.gov.uk/government/collections/community-libraries-good-practice-toolkit)

[Income generation for public libraries](https://librariestaskforce.blog.gov.uk/2017/06/15/income-generation-for-public-libraries/)

**Recommended data sources**

Partner surveys

Performance trends relating to outcomes and value for money

**What methods and practices do we currently have in place relating to this characteristic?**

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**Strengths**

**Areas for improvement**

**Characteristic 7: managing and developing people**

**Excellent library services plan, recruit, manage and develop the professional and volunteer workforce in line with the present and future needs of the organisation and the workforce.**

This includes:

* planning the workforce capacity required to achieve the desired outcomes, establishing clear roles and responsibilities and identifying the required competencies and knowledge
* working to attract and recruit a diverse professional and volunteer workforce with the required competencies and knowledge and/or the potential to develop
* supporting professionals and volunteers to develop, learn and improve in line with the needs of the organisation and the workforce, using a wide range of learning, development and improvement support activity
* developing a team of professionals and volunteers who own collective responsibility for achieving the desired outcomes and engaging everyone in developing and improving the service
* communicating effectively with each other, giving professionals and volunteers the opportunity to know as much as they need
* helping the professional and volunteer workforce maintain and develop personal resilience

**Relevant guidance documentation**

[Libraries Deliver: Ambition for Public Libraries in England 2016 to 2021](https://www.gov.uk/government/publications/libraries-deliver-ambition-for-public-libraries-in-england-2016-to-2021)

[Public Library Skills Strategy 2017-2030](https://www.cilip.org.uk/about/projects-reviews/public-library-skills-strategy/public-library-skills-strategy-2017-2030)

**Recommended data sources**

Staff surveys

Performance trends relating to staff development and resilience

**What methods and practices do we currently have in place relating to this characteristic?**

**What is our current progress in relation to these characteristics? (tick the most appropriate box)**

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**Strengths**

**Areas for improvement**

**Characteristic 8: managing financial and physical resources**

**Excellent library services plan and manage financial and physical resources to develop the service, reduce costs and ensure sustainability, ensuring that they make use of public funds effectively and efficiently.**

This includes:

* allocating and planning financial resources in line with the long and medium term plans to ensure sustainability and achievement of enhanced outcomes
* managing financial resources in a robust and transparent way, whilst maintaining the flexibility to enable people to respond to opportunities and unexpected situations and to support innovation
* exploring the opportunities for integrating and co-locating libraries with other government and partner services
* reviewing and improving accessibility of the facilities, in line with the identified needs of the community and the Equality Act
* planning and implementing preventative maintenance, refurbishment and renewal programmes for facilities to optimise performance in the long-term and to ensure they continue to meet the expectations of users
* making the best use of new technology to improve access and service delivery

**Relevant guidance documentation**

[Libraries Deliver: Ambition for Public Libraries in England 2016 to 2021](https://www.gov.uk/government/publications/libraries-deliver-ambition-for-public-libraries-in-england-2016-to-2021)

[Delivering local solutions for public library services (Local Government Association)](https://www.local.gov.uk/delivering-local-solutions-public-library-services)

[Libraries: alternative delivery models toolkit (Libraries Taskforce)](https://www.gov.uk/government/publications/libraries-alternative-delivery-models-toolkit)

[Equality Act 2010: guidance](https://www.gov.uk/guidance/equality-act-2010-guidance)

**Recommended data sources**

User surveys

Performance trends relating to outcomes and value for money

CIPFA stats

Planned, preventative maintenance records

Fault logs

**What methods and practices do we currently have in place relating to this characteristic?**

**What is our current progress in relation to these characteristics? (tick the most appropriate box)**

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**Strengths**

**Areas for improvement**

**Characteristic 9: service design, innovation and delivery**

**Excellent library services provide an innovative range of services, which reflect the Society of Chief Librarians’** [**Universal Offers**](http://goscl.com/universal-offers/)**, based on the needs of the local community, and deliver these in line with their expectations.**

This includes:

* reviewing the Universal Offers and other service offers to identify which to implement, to what extent, and at which sites, based on the desired outcomes and the identified needs of the local community
* ensuring that library services are accessible to all people in the community
* proactively communicating the service offer with all parts of the community in a meaningful and engaging way
* maintaining levels of suitably refreshed stock and up-to-date information to ensure that user needs and expectations are met
* delivering a prompt, responsive and seamless service to users which aims to exceed their expectations
* reviewing the effectiveness of the service offer on a regular basis, using data and user feedback and making changes using ideas from staff, volunteers, partners and users

**Relevant guidance documentation**

[Libraries Deliver: Ambition for Public Libraries in England 2016 to 2021](https://www.gov.uk/government/publications/libraries-deliver-ambition-for-public-libraries-in-england-2016-to-2021)

[Universal Offers](http://goscl.com/universal-offers/)

[Delivering local solutions for public library services (Local Government Association)](https://www.local.gov.uk/delivering-local-solutions-public-library-services)

**Recommended data sources**

User surveys

Staff surveys

Partner surveys

Performance trends relating to outcomes

**What methods and practices do we currently have in place relating to this characteristic?**

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**Strengths**

**Areas for improvement**

**Characteristic 10: review, improvement and learning**

**Excellent library services continually review and improve the way in which they operate and learn from what has happened, so that the service meets the needs and expectations of the community and is sustainable.**

This includes:

* conducting annual self-assessment using this framework, planning valuable improvement actions and implementing the changes
* reviewing our service delivery processes, to identify and remove non-value adding activity and waste and enhance the value to the users
* implementing a structured approach to systemic problem solving
* proactively learning from peer organisations and organisations in other sectors to help improve the services
* learning from the past and using this knowledge to improve the future
* encouraging and supporting all staff and volunteers to implement many, minor improvements on an ongoing basis

**Relevant guidance documentation**

[Libraries Deliver: Ambition for Public Libraries in England 2016 to 2021](https://www.gov.uk/government/publications/libraries-deliver-ambition-for-public-libraries-in-england-2016-to-2021)

**Recommended data sources**

Staff surveys

Partner surveys

Performance trends relating to outcomes and value for money

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| Evaluation element | 0 | 1 | 2 | 3 | 4 |
| Not at all | Just started | To some extent | To a large extent | Completely |
| **Plan**  To what extent has the organisation developed interlinked methods and practices which achieve the above characteristic? |  |  |  |  |  |
| **Do**  To what extent are these methods and practices implemented systematically across the organisation? |  |  |  |  |  |
| **Check / Act**  To what extent does the organisation review and improve the effectiveness and efficiency of these methods and practices? |  |  |  |  |  |
| **Impact**  To what extent have these methods and practices achieved positive results for stakeholders? |  |  |  |  |  |

**Strengths**

**Areas for improvement**