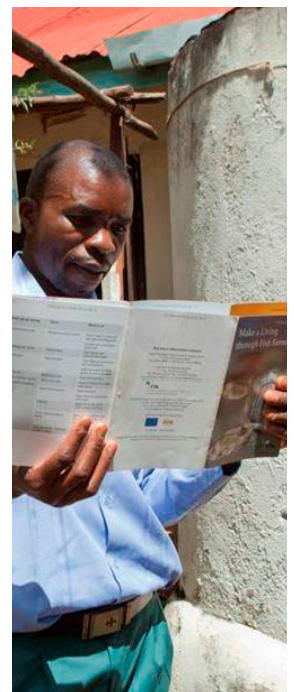


# GLOBAL LIBRARIES

## Impact Planning and Assessment Guide



“ The impact is very important because when people are more educated [and] they have access to technology, for sure they will also have a better life ... [They can say], ‘I am more educated, I have more self-confidence, I have access to information and I can have a healthier life—I know where to find information and I can continue developing myself.’ ”

**Senior library manager, Romania**



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# Welcome to the Global Libraries Impact Planning and Assessment Guide

This guide provides an overview of Impact Planning and Assessment (IPA)—the process Global Libraries (GL) grantees use to plan, measure, and report on the impact their programs have on the lives of people in the communities they serve. It is designed as a companion piece to the GL Advocacy and Training Guides, and focuses on the impact assessment component of the IPA process.

While not a comprehensive manual, this guide is intended to help grantees better understand the GL process of impact assessment and make use of the many other resources and tools available. It is designed to be an overview of IPA for new country grant teams, a central resource for new impact specialists, and a reference tool for veteran country grantees. Other grantees (besides country grant programs) may also find elements of this guide that can be applied to their library impact assessment work.

## What This Guide Includes

The IPA Guide is presented in five parts—from key terms and concepts to a detailed step-by-step process for implementing IPA and working to ensure that library impact assessment activities are sustained.

- **Part I: Introduction to Global Libraries Impact Planning and Assessment.** This part discusses the importance of impact assessment and provides an overview of the IPA process, including key terms, timeline, and stakeholder roles.
- **Part II: IPA Road Map.** This part is a step-by-step overview of the main activities country grantees will conduct throughout the IPA process.
- **Part III: Mastering the Elements of the IPA Process.** This part explains in more detail the types of data all country grantees collect, plus good practices for customizing impact assessment and reporting the findings.
- **Part IV: Thinking Beyond the IPA Process.** This part explores the links between impact assessment, advocacy, and sustainability of impact assessment activities after a country grant ends.
- **Part V: Appendix of Impact Assessment Resources.** This part includes a full list of the resources described in this guide.



Each part of this guide includes links to relevant resources where grantees can find more information (marked with the symbol shown at left), as well as relevant country grantee examples.

In addition to the information in this guide, GL program officers, IPA consultants, and impact assessment staff are always available to support your country's IPA team. There is an impressive and growing body of knowledge on impact planning and assessment developed in GL grantee countries and elsewhere. We encourage you to engage with other grantees by sharing your experiences and lessons learned with the broader community on GL Voices: <https://spaces.gatesfoundation.org/community/global-libraries>





# Part I: Introduction to Global Libraries Impact Planning and Assessment

This introductory section is designed to orient new grantees to the basics of the IPA process. The following pages provide background information on the GL approach to impact assessment, definitions of key terms, and an overview of the process you will follow to plan and assess the impact of your grant program—including who the key stakeholders are and how they will work together.

## What Is Impact?

The essence of impact is change. For GL country grantees, impact refers to any change or effect that a country grant program has on an individual, group, or community. GL believes that impact should be planned and incorporated into all phases of a country grant program, so that evidence of impact can be used to strengthen the program and advance the position of public libraries over time.

Assessing impact means looking beyond the new or improved infrastructure that a grant program puts into place—for example, the number of computers, connections, or networks available at public libraries in your country. While these metrics are the foundation of country grant activities, **impact is about the difference that these factors have made to individuals and groups.**

### Impact measures changes that may be...

- Positive or negative (people can be better or worse off as a result of a program)
- Intended or accidental
- Affecting a specific group or a whole range of people, from library users and staff to local government officials or specific community groups
- Quick and small or long term and life-changing

These changes may be related to...

<p><b>Knowledge and skills</b></p>	<p><b>Examples:</b></p> <ul style="list-style-type: none"> <li>• Librarians know what information available online can help different groups of users.</li> <li>• Library users know how to buy and sell goods or apply for a job online.</li> </ul>
<p><b>Attitudes and perceptions</b></p>	<p><b>Examples:</b></p> <ul style="list-style-type: none"> <li>• Library users perceive that library computer and Internet access is of benefit to the community.</li> <li>• Library users are more confident about their ability to find jobs/get government benefits.</li> <li>• Library users feel more connected to family and friends living elsewhere.</li> <li>• Librarians are confident in their ability to support community learning needs.</li> </ul>
<p><b>Behavior</b></p>	<p><b>Examples:</b></p> <ul style="list-style-type: none"> <li>• People visit the library to access e-government services, like paying taxes, securing benefits, or applying for licenses.</li> <li>• Library users use library computer and Internet access to enroll in online courses/seek new qualifications.</li> <li>• New groups of people visit the library to access computer and Internet services.</li> </ul>
<p><b>Quality of life</b></p>	<p><b>Examples:</b></p> <ul style="list-style-type: none"> <li>• Library users join online groups/networks and feel less isolated.</li> <li>• People use library information and support to make positive changes to their health.</li> <li>• People save time and money.</li> </ul>
<p><b>Broader social or economic change</b></p>	<p><b>Examples:</b></p> <ul style="list-style-type: none"> <li>• Better integration of “hard-to-reach” groups in the local community (social inclusion).</li> <li>• Lower unemployment.</li> <li>• More democratic society/greater participation in government.</li> <li>• Increased cultural diversity.</li> </ul>

While a country grant team may have an ultimate vision of broader social or economic change, keep in mind that a balance of large and small types of impact is also important. Short-term impacts demonstrate momentum, help to motivate people, illustrate that the program is on target, and enable grantees to build toward the ultimate impact goals.

## The Impact of Impact Assessment

The following are some of the important ways that impact data collected through the IPA process can help the entire country program grant team achieve its goals.

- Understanding whether program services are contributing to community impact
- Calling attention to changes that can help programs more effectively meet their goals
- Guiding the formation of new partnerships or supporting existing partners
- Using evidence of impact to advocate for continued support for public libraries

**Using Impact for Advocacy in Indonesia:** The PerpuSeru program in Indonesia has used data about the impact of its library services to seek additional funding from district governments. Out of 34 district public libraries that receive support from the program, 19 received increased budgets in 2014, compared to just one in 2013. For example, the budget of the District Library in Pamekasan (East Java) nearly doubled, while other individual libraries saw their budgets increased by up to 85 percent.

For more information about the critical role of impact data in helping libraries to secure long-term, sustainable funding, see “Impact Drives Advocacy” in Part IV.



- [Article] **Planning for Impact, Assessing for Sustainability:**  
<http://www.emeraldinsight.com/journals.htm?articleid=1852528>
- [Article] **What Is Impact Assessment and Why Is It Important?:**  
<http://www.emeraldinsight.com/journals.htm?articleid=1819366>



## Overview of Impact Planning and Assessment

The IPA process guides all GL country grantees through the same basic stages: learning about local needs, planning library services to meet these needs, implementing a system to measure the results of services, and applying evidence of the program's impact to improve services and support advocacy efforts.

These four stages of the IPA process align naturally with the stages of the country grant program, as shown in the following chart. The exact details and activities of each stage in the process will vary according to each grant program's local and national needs, and should be coordinated with a GL program officer.



The IPA process is vitally interwoven with the other aspects of designing a country grant program, such as establishing training curricula, procuring and installing equipment, and implementing publicity campaigns.

### Guiding Principles of the IPA Process

We ask that grantees keep the following guidelines in mind when embarking on the IPA process:

- Grantees should **design programs and activities destined to contribute to changes in people's lives**. This is achieved by deeply engaging community stakeholders in program design, to identify desired outcomes linked to users' needs and plan activities that contribute to these outcomes. Once a country grant program is in operation, grantees will collect evidence that describes this contribution—through a standardized survey as well as other methods, like stakeholder perceptions, surveys, case studies, and relevant statistics compiled by a third-party or government entity (e.g., labor and health statistics). Any valid method of social science research can be used.
- GL will require grantees to **report on certain performance metrics and some standard indicators of impact**. GL assesses the aggregate data from all country grants to examine potential trends, collective achievements, and outstanding country needs. These metrics are outlined in more detail in Part III.
- In addition to required indicators, we recommend that grantees **gather data that align with the priorities of the government funding their libraries**—such as increasing access to employment resources or advancing education. This will help librarians demonstrate the value of the library to communities in a way that aligns with the government's interests.
- After choosing the focus areas of local importance, grantees should **invest time and effort to identify locally relevant evidence that is appropriate to the focus area**. GL has developed a wide range of potential indicators for grantees to draw from when planning how to measure impact in specific areas. Consider carefully what evidence you will need to show your program's contribution toward the desired impact, as well as how often you will need to collect evidence, to avoid measuring more than is necessary.



- Grantees should **design a grant program that we can reasonably assume will contribute to change in people’s lives—even if the change cannot be directly attributed to the program.**<sup>1</sup> For many people in the research field, the term “impact assessment” refers to a specific approach to collecting evidence that shows how an initiative is directly responsible for causing some change or benefit. That approach seeks to attribute a perceived change (like improved health) to a particular intervention (like providing access to health information) and answer questions like “How much better off are beneficiaries as a result of the program?” Attribution studies are rigorous, can be expensive, usually require high levels of technical expertise, and frequently rely on randomly selected “control” and “intervention” groups.

While grantees may choose to customize their data collection to capture very specific changes relevant to their program, GL does not expect grantees to prove conclusively, for instance, that installing computers in their libraries has led to an X% increase in local incomes. We can reasonably assume that a country grant program has contributed to the changes identified and has “added value,” but there will be other influences involved so we do not seek to prove a causal relationship. You may come across the term “impact assessment” on the foundation website and in other research contexts where it refers to an attribution study—however, this is not what GL expects from the IPA process.

- Grantees should **focus on effectiveness before efficiency.** Libraries have traditionally assessed their efficiency using indicators such as numbers of loans, occupancy rates, or numbers of people trained. These tell us what the library and the librarian have provided or done with the resources that they have expended and how much the services are being used. Unfortunately, most library indicators do not tell us very much about the effects of the services that are being measured or how these services are perceived by users. Impact assessment is more concerned with effectiveness. What difference has it all made? Has the library met its own goals?
- **A central premise of implementing the IPA process during the lifetime of the country grant is to ensure the sustainability of impact assessment activities after the grant ends.** While collecting evidence of the impact of library services is essential to designing and improving country grant programs, the ultimate goal should be to embed impact assessment activities (e.g., data collection and analysis) into local or national library systems, so libraries in the country can continue to understand and share evidence of the change they bring to communities. (See Part IV for more details about sustainability.)

<sup>1</sup> “Attribution” and “causation” are concerned with whether the intervention directly caused the impact. That is, they seek to prove that the change would not have taken place had the intervention not occurred. Attribution studies frequently involve random experiments, which must be controlled (rigorous), require high levels of technical expertise, and can be expensive. Particularly because we believe it is more important for our grantees to work with supportive local governments *rather than random ones*, GL does not expect grantees to undertake attribution studies. Instead, GL asks grantees to gather evidence of benefits that have accrued since the program began, and with this evidence build a case for how the program has contributed to the changes identified and has “added value,” *even while there may be other influences involved*. See further definitions of terms in the section “Key Terms in Impact Assessment.”



## Key Terms in Impact Assessment

Confusion about the meaning of impact, impact assessment, and other associated terms can lead to inconsistency in how these terms are used in documents and reports. The definitions offered here seek to establish a common understanding of how GL uses these terms in relation to the country grant program. IPA terms such as “impact” and “indicators” may not have a direct equivalent in your own languages, so you will need to find words that best express the meaning of these terms.

- **Evidence:** Evidence is not a special category of information—it can be any type of information or piece of data that people use to help them answer a question. You will gather information/data about various aspects of your GL country grant program. It becomes evidence when you use it to build a case about the impact of public libraries for local stakeholders or to demonstrate that implementation of program activities is on target.
- **Focus Area:** This is the overarching theme of a country grant program and, therefore, the theme of the impact data that a grantee chooses to collect. A program focus area may be one of the seven issue areas outlined in the Common Impact Measurement System (CIMS), such as education or digital inclusion (see Part III for a complete list) or something else defined by the grant program team. Choosing a focus area sets the overall course for the country grant program by narrowing down the desired outcomes that the program will seek.
- **Outcome:** Any IPA plan should start with a clear statement of the outcome or the desired end results of program activities. In other words, what ultimate difference is the program designed to support? Outcomes should be specific, measurable, and focused on the change you are seeking. They should also be achievable within the period of your country grant program, so they will need to take into account the practicalities in your country. In addition to a primary outcome, which is the final state that a program seeks to achieve, grantees should also consider smaller intermediate outcomes that describe interim changes that are likely to occur on the way to the primary outcome.
- **Outputs:** Outputs are a measure of what programs do or provide and who they reach. These measures are usually quantitative—for instance, the number of workstations installed in libraries, or the proportion of the local adult population attending Internet training sessions. Outputs are an important element of IPA, since they tell you what your program is developing and whether your implementation plans are on target.

- **Indicators:** An indicator is a specific statement against which achievement or progress can be quantitatively measured. They enable grantees to monitor and assess the “health” of the whole country grant program. The choice of indicators is therefore of great importance. What information will indicate that a program is performing well and achieving the team’s goals? What will look different? What will people do differently? What different resources will be produced?

To assess complex programs, such as the effects of improving public access to information, a range of indicators is needed:

- **Output indicators**, or indications of what and how much work is being done, are quite common. Grant programs frequently measure how many people have used libraries, how many people have been trained to use technology at a library, and other indicators designed to show that the program delivery is efficient and making progress.
- **Outcome indicators** are used to demonstrate the quantifiable benefit of library services, and are essential to show whether the time and effort invested in a country grant program are producing the kinds of change that the grant team is aiming for.

See Part III for more details about the types of indicators that GL country grant programs can collect.

- **Targets:** Targets are the short- or medium-term goals for your country grant program, expressed in terms of the chosen indicators.

- **Output targets** usually focus on whether pre-specified changes are actually achieved within a set time period. For example, you may set targets for the number of people to be trained within the first six months of your country grant program or the number of workstations to be installed within the first year.
- **Outcome targets** are posed in terms of what level of difference the service should make to the community, to individuals and groups, or to the organizations involved. They are focused on what your country grant program has achieved (for example, the percentage of local elderly people who use email within the first year of the initiative).

If you intend to set targets, it is vital to have good baseline data. Unless you know where you are starting from (e.g., how many local elderly people already use email; what levels of computer skills librarians already possess), you cannot set sensible and realistic targets.

## IPA Players and Roles

### IPA Is a Team Effort

Because the IPA process plays an important role in designing country grant programs, informing program change, and providing evidence for ongoing use and funding of the services, it must be a collaborative effort among various parties—both within the grant team and with external stakeholders. Key players in the IPA process include:

- **Grant team members:**

- **Impact specialist:** Works with libraries and external partners to ensure that data about their reach and impact are collected effectively; synthesizes and reports data (see more detail about this role below).
- **Advocacy specialist:** Informs decisions about what data to collect, based on what would be useful for advocacy; uses data for advocacy.
- **Training specialist:** Builds the capacity of library staff to use computers and the Internet (skills needed to collect and report library impact data) and any training in impact assessment for library staff or directors.
- **Country program director:** Maintains a high-level understanding of all impact planning and assessment work; provides strategic guidance to team members to ensure that data is useful and used for program improvement, learning, accountability, and advocacy.

- **Global Libraries program officers:** The program officer is your key point of contact at GL, for IPA work and all other matters. You are expected to work closely with your program officer through this process to collaboratively design a program that is well suited to: (a) contribute to locally relevant improvements in people's lives, and (b) advocate for long-term local funding. Thus, IPA will become an ongoing discussion between you and your program officer, as learning is captured and used to improve your programs.

- **Foundation IPA team:** GL has a team dedicated to IPA that manages overarching processes, such as performance metrics data collection, data management, and analysis across all grants. The team is made up of GL program officers and the foundation's evaluation experts. Alongside your program officer, this team can provide help on request.

- **GL IPA consultants:** GL has contracts with a number of experienced impact consultants who are available to provide support and guidance to grantees throughout the IPA process. Grantees should explore this resource in consultation with their program officer.

- **Research vendors/data collectors:** GL recommends that country grantees work with external organizations to collect certain local data, to minimize the burden for library staff. In the past, libraries have partnered with market research firms, polling firms, and universities to collect this type of data.

- **External stakeholders:** Stakeholders are those individuals, groups, and organizations who are interested in the results of your intervention. Engaging with external stakeholders, such as partner organizations or government decision makers, allows grantees to identify which local needs are most important and design IPA activities to show how libraries help address those needs. Involving groups like local government officials, funders, and influential community organizations from the beginning of the IPA process also helps ensure that they feel heard and are interested in your program succeeding.



## Role of the Impact Specialist

The impact specialist is the primary person responsible for evaluation of projects and processes within a country grant program. He or she is an essential member of the country grant team and should work closely with the country program director and other team members to lead and carry out the following tasks:

### ● **Planning and preparation:**

- Design the local IPA model in partnership with GL, the project team, and local stakeholders
- Develop a plan for completing impact assessment during and beyond the lifetime of the project
- Host learning and training events for other team members to help them understand data use
- Conduct outreach to and engage key stakeholders
- Understand required indicators and customize additional indicators to fit local needs
- Research available data (e.g., from universities, market research companies, statistical agencies) to determine the project baseline

### ● **Implementation:**

- Educate partners and other stakeholders within the library community on the IPA process
- Work with vendors to create a baseline survey and impact assessment surveys
- Manage the IPA implementation process, including management of evaluation, negotiation, and the contract with IPA service providers

### ● **Reporting:**

- Report on planning and local customization to the GL team
- Summarize reports from any external data collection service providers and give feedback to the stakeholders and GL team
- Determine key insights and implications from the data
- Report on findings to improve program services and support advocacy outreach

For more information on developing competencies related to these tasks, impact specialists can contact their national or regional evaluation association and ask about skill-building resources or classes on research methods.



– [Guidance] **GL Impact Specialist Job Description:**  
<https://spaces.gatesfoundation.org/docs/DOC-2536>

– [Guidance] **Types of IPA Technical Assistance Available:** List of technical assistance services that grantees can request from GL/IPA consultants:  
<https://spaces.gatesfoundation.org/docs/DOC-3142>



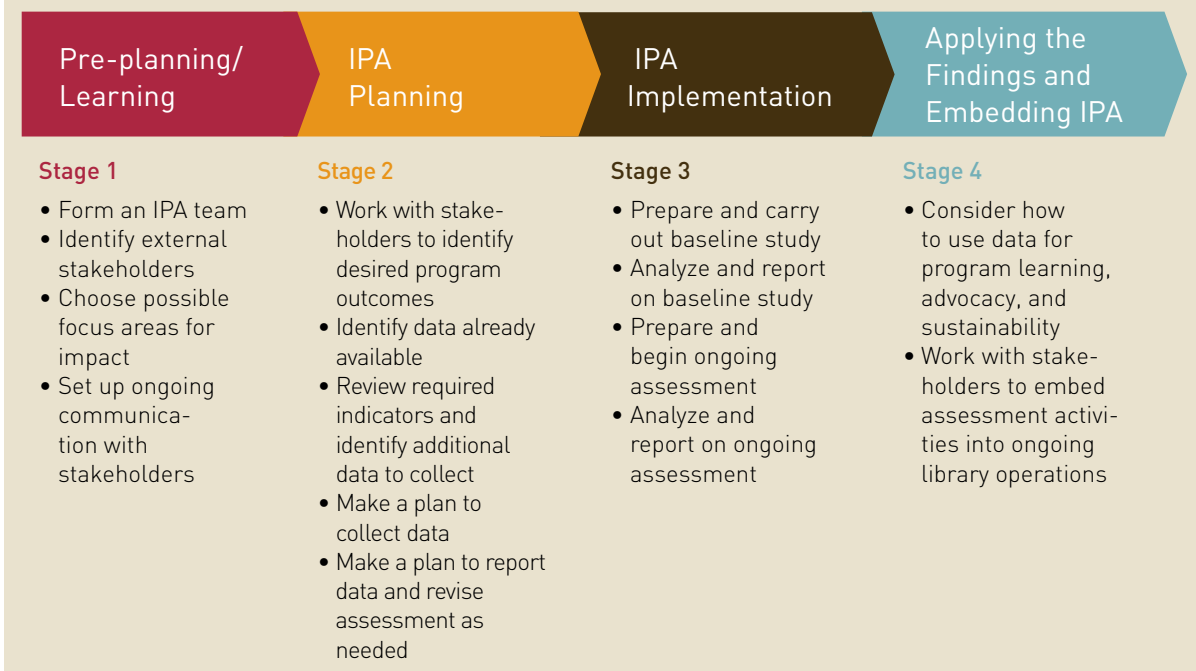
## Part II: IPA Road Map

In this section, we outline a series of steps that GL country grantees can take to implement each stage of the IPA process within their own grant programs. This “Road Map” describes the main activities that country grantees will embark upon to help them decide locally:

- What specific impact the country program seeks to achieve
- What information is needed about the current situation (baseline data) to show whether change occurs and how to collect it
- How and when to monitor progress as the program is implemented
- How to use information from monitoring implementation to manage obstacles and overcome challenges
- How and when to collect information about program impact
- How to advocate using evidence generated through the IPA process

The exact process that each grant team implements—and the order in which the steps are implemented—should be planned in alignment with that program’s needs.

### Overview of Main Activities in the IPA Process



## Road Map Stage 1: Pre-planning/Learning

The pre-planning/learning stage focuses on putting systems in place that will guide the development of desired outcomes and later impact assessment. This is the stage where you will put in place an impact planning and assessment team, identify other key stakeholders who will need to be part of the process, and establish clear and open lines of communication about the types of outcomes you hope to achieve. A thorough and thoughtful pre-planning/learning stage can help build understanding and goodwill among stakeholders and ensure that your IPA process will be well designed and sustainable over time.

The five main steps along this path are:

- 1.1 Form an IPA team
- 1.2 Understand the IPA process
- 1.3 Identify national and local stakeholders
- 1.4 Formulate possible focus areas for impact
- 1.5 Set up mechanisms for ongoing communication with key stakeholders

### 1.1: Form an IPA team

- Identify an impact specialist to be responsible for leading IPA activities and assembling a planning/implementation team.
- Assemble an IPA team comprised of qualified program staff and external consultants.
  - Depending on local needs, the team may include an advocacy specialist; national library association; members of the library community; and local and international consultants from universities, market research companies, and/or statistical agencies.
  - The external consultants on the IPA team will do more than help with procurement—they will have a wider role in determining how to plan and implement IPA activities.
- Decide who will be responsible for which IPA activities, noting what can be done by the IPA team and where outside assistance will be needed.
  - Consider who might collect impact evidence (both baseline study and ongoing impact assessment). If the team is considering hiring a firm to collect this data, should it be a local, national, or international firm? Is more than one firm needed? Could the team benefit from technical assistance from a consultant to identify appropriate candidate firms?
  - Identify the most appropriate method for procuring outside assistance, utilizing consultant technical assistance if needed.
  - Consider who may eventually take over data collection at the end of the grant program (for instance, a partner organization like the national library) and what activities they may reasonably expect to conduct in the long term.

**Bringing in Outside IPA Support in Poland:** The Poland team decided from the beginning to have a single impact specialist and no additional impact support staff. Instead of working with an internal IPA team, the impact specialist carries out most library research activities by hiring outside consultants. Outsourcing has enabled cost reduction and flexibility, introduced a valuable outside perspective on program implementation and impact, and provided technical skills the grant program team lacks. This decision was made possible because there is a relatively large number of research firms and organizations in Poland, which meant many experts and consultants were available for hire.



– [Guidance] **Impact Specialist Job Description:**  
<https://spaces.gatesfoundation.org/docs/DOC-2536>

## 1.2: Understand the IPA process

- Ensure that the IPA team clearly understands the definition of impact. This may include preparing a translation and examples to share with internal stakeholders.
- As a team, review the IPA process and the main activities involved in each stage.
- Consider the range of possible outcomes for impact assessment: What might this program accomplish? How and when might the grant team use impact data/findings? Look at the GL Common Impact Measurement System (CIMS) framework and prior efforts by other GL grantees and consider what this program could do the same or differently.



– [Guidance] **Reading List on Assessing the Impact of Public Libraries:**  
This document includes citations to three recent literature reviews on assessing the impact of public (and other) libraries:  
<https://spaces.gatesfoundation.org/docs/DOC-2535>

## 1.3: Identify national and local stakeholders

- Brainstorm a list of significant players in the country for each stage of the IPA process. When creating this list—which may include public libraries, potential partner organizations, government leaders, and businesses—try to identify a specific individual within an institution with whom you can build a relationship in the future. (Note: Some of these people may also be identified in Stage 1, Step 6 of the advocacy process, which asks grantees to identify a preliminary list of key stakeholders.)
- The following questions may help identify the stakeholders with whom you should start building relationships and to whom you can go for information:
  - Who relies on public access to computers and the Internet?
  - Who could benefit more from increasing their use of these public library services?
  - Who are the key government leaders who make decisions about education, employment, and library funding?
  - Who currently collects or uses data about libraries?
  - Who might be interested in helping the library system?



#### 1.4: Formulate possible focus areas for impact

- (Note: This step is closely aligned with Stage 1, Step 5 of the advocacy process, which asks grantees to identify preliminary advocacy goals).
- Look at national and local community needs and stakeholder priorities (for instance, review relevant national documents to identify government priorities).
- Compare these priorities with the list of CIMS impact areas and related outcomes to begin to develop a vision of what public libraries in your country could achieve through the program.
- Use these lists in initial discussions about possible focus areas with your program officer, IPA team members, and other key stakeholders.



– [Tool] **CIMS Workbook:** Excel document listing all of the required and optional CIMS indicators, sorted by impact domain, with indicators for each: <https://spaces.gatesfoundation.org/docs/DOC-2663>

#### 1.5: Set up mechanisms for ongoing communication with key stakeholders

- Schedule regular contact with key stakeholders to keep them involved in future IPA activities, starting by asking the following questions:
  - Who should be kept informed of the grant program’s ongoing IPA activities?
  - What will be the best way to stay in touch (e.g., email, phone calls, or meetings)?
  - How often should this contact take place?

**Ensuring Ongoing Communications With Stakeholders in Romania:** To keep the lines of communication open between the Biblionet program and county library managers in Romania, the program team periodically sent library managers updates on impact data collected so far, as well as online opinion surveys on impact-related topics. For instance, after Biblionet formed the Romania Impact Group—a group of volunteer librarians working to sustain impact assessment during and after grant implementation—the program team surveyed county library managers to understand how they perceived the group. Half of library managers in Romania responded to the survey, and nearly 90 percent said the group should continue to exist when the program grant ends. See full survey and results below.



– [Example] **Romania Survey of County Library Managers:** The Biblionet team used this survey as part of ongoing communications with county library managers in Romania: <https://spaces.gatesfoundation.org/thread/1972>

## Road Map Stage 2: IPA Planning

In the IPA Planning stage, you will continue gathering information from stakeholders and use it to decide how you will collect and report evidence of impact. This begins with stakeholder meetings and workshops to explain the IPA process, learn about stakeholder needs and priorities, and outline desired outcomes accordingly. This stage is also a critical juncture where you will decide which indicators to measure in addition to the required Performance Metric (PM) and CIMS frameworks, in order to provide focus, encourage stakeholder engagement, and demonstrate the unique benefits of your grant program. By the end of this stage, you will have a plan in place to begin data collection.

There are six steps along this path:

- 2.1 Outline the program's desired outcomes in consultation with stakeholders
- 2.2 Revisit desired outcomes, considering needs, priorities, and risks
- 2.3 Identify and assess whatever data are already available
- 2.4 Define indicators
- 2.5 Plan data collection
- 2.6 Plan reporting of impact data and adjustment to impact assessment framework

### 2.1: Outline the program's desired outcomes in consultation with stakeholders

- (Note: This step is closely aligned with Stage 2, Step 3 of the advocacy process, which asks grantees to coordinate impact and advocacy goals.)
- Conduct workshops/interviews with key stakeholders and library users to introduce the concept of IPA and discuss their needs and interests.
- Use information from these consultations to outline desired outcomes that address local needs and priorities. It is important to coordinate this process with advocacy planning to ensure that the impact data you collect will be useful in advocacy activities.

**Identifying Desired Program Outcomes in Colombia:** In 2013, a national assessment of library technology and user needs in Colombia showed a lack of interest in libraries, resulting in low rates of library use. The country program team in Colombia met with key stakeholders from the Ministry of Culture to identify desired outcomes for the program to change the way Colombians perceived libraries.

To support the national government's existing policy priorities, the Ministry of Culture proposed a vision of public libraries as places where Colombians access technology and services that promote digital inclusion, culture, education, and access to e-government services. Together, the Ministry and the grant program team decided on the following outcomes:

- To improve the level of education of Colombians through reading and education services in public libraries
- To overcome digital inclusion barriers by increasing access to online information and training on the use of library technology
- To facilitate access to e-government services at public libraries



- [Example] **Lithuania Localization of Indicators 2007:** This document is the beginning of a Lithuanian impact assessment plan. It provides examples of impact assessment goals, indicators, and methods of collecting data, which were the basis for planning of impact assessment in the pilot countries of Lithuania and Latvia: <https://spaces.gatesfoundation.org/docs/DOC-2537>

## 2.2: Revisit desired outcomes, considering needs, priorities, and risks

- As a team, reflect on the lessons learned during pre-planning/learning and stakeholder consultations and ask the following questions about the draft outcomes:
  - Do they address practical needs identified by the communities that the grant program will serve?
  - Do they take into account the stated priorities of national and local government stakeholders?
  - Are they realistic? What potential risks or challenges may arise that would prevent the team from achieving these outcomes?
- Work with your GL program officer to adjust the desired outcomes as needed based on this assessment and finalize them.

## 2.3: Identify and assess whatever data are already available

- Consult your national government, library association, or other national body responsible for collecting data/statistics.
  - Find out how, when, and from whom the data are collected.
  - Assess how accessible and reliable the data are.
  - Identify any obvious gaps in existing data related to your desired outcomes, to revisit when you plan data collection.

## 2.4: Define indicators

- Review the list of required CIMS indicators to see which of your needs they may already address.
- If more indicators specific to your focus area are needed:
  - Start by consulting the list of optional CIMS indicators.
  - Review the list of omitted CIMS indicators that were proposed by GL staff, consultants, and grantees when CIMS was developed but were not ultimately included in the framework (see link below).
  - Identify any additional/customized indicators as needed to address your desired outcomes.
- Confirm that the selected indicators align with government priorities.



- [Tool] **CIMS Workbook:** Excel document listing all of the required and optional CIMS indicators, sorted by impact domain, with indicators for each: <https://spaces.gatesfoundation.org/docs/DOC-2663>
- [Guidance] **Omitted CIMS Indicators:** List of unused indicators from the CIMS planning process, for teams that want to dig deeper into a certain area of impact: <https://spaces.gatesfoundation.org/docs/DOC-2666>

- [Guidance] **Workshop on Building Impact Indicators:** PPT slide presentation about how to identify useful impact objectives and indicators: <https://spaces.gatesfoundation.org/docs/DOC-2534>
- [Example] **Methods and Instruments Used in IPA Planning in Latvia and Lithuania:** This document was originally produced in March 2007 to document the work done with the Latvian and Lithuanian impact assessment teams to plan their impact assessment effort. The teams adapted the material described here in a process involving local stakeholders and an assessment of local needs. The result was the impact assessment work and surveys documented elsewhere in the toolkit. The methods and instruments described here are based on practice in a number of countries. The Latvian and Lithuanian teams found these methods useful as a basis for localization. The information was considered potentially valuable for various stakeholders: <https://spaces.gatesfoundation.org/docs/DOC-2538>

## 2.5: Plan data collection

- Decide on parameters for data collection for baseline and ongoing study:
  - What data are needed (e.g., where are holes in existing data)
  - When the data will be collected
  - From whom the data will be collected (including how to ensure a representative sample)
  - Who should collect the data and how to engage them
  - How the data should be collected (which methods and tools will be used, and how to develop them if needed)
  - How libraries will submit data (e.g., what software to use)



- [Guidance] **Collecting Stories and Constructing Case Studies as Impact Evidence:** Outline of the rationale for collecting stories and compiling service case studies as part of impact assessment; describes how service case studies can be prepared, concentrating on choosing cases, collecting the stories, and turning them into service case studies. It then describes how stories can be collected from users, again concentrating on choosing the storytellers, collecting the stories, and editing them. Some examples are offered: <https://spaces.gatesfoundation.org/docs/DOC-2539>
- [Example] **Case Study on Surveys of Children:** In both Latvia and Lithuania, surveys of children were carried out as part of their baseline work. In both countries, this provided original and important insights into how children view and use public libraries and a basis for future work with children. There are a number of points of interest and an English translation of the Latvian questionnaire is available: <https://spaces.gatesfoundation.org/docs/DOC-2540>
- [Example] **Lessons Learned Using Web Tools:** Both Latvia and Lithuania used Web surveys to collect data for impact assessment. Both encountered some difficulties, which are briefly described in this case study to help others avoid them. In both cases, there was a reflection on the choice of a suitable Web survey software given that there are a number of commercially available products. The possibility to set up surveys in the local language was an obvious requirement, as well as ease of use and cost. In the end, it was decided in both cases to use a tool provided by the company



contracted for the survey work. While this document describes the problems encountered and solved, the main lesson is to do a pilot where Web tools are concerned. <https://spaces.gatesfoundation.org/docs/DOC-2551>

- [Guidance] **Data Entry and Storage:**  
<https://spaces.gatesfoundation.org/docs/DOC-6316>
- [Guidance] **Creating a Research Sample:**  
<https://spaces.gatesfoundation.org/docs/DOC-6315>

## 2.6: Plan reporting of impact data and adjustment to impact assessment framework

- Using the information collected so far in the IPA process, develop an impact assessment framework document that includes your program’s desired outcomes, indicators, and plan for data collection (see first resource below).
- Decide on parameters for how to report the results of data collected.
- Make a schedule for regular revision of the impact assessment framework based on data collected.



- [Example] **Poland Impact Assessment Framework:** Sample framework outlining the scope of the impact assessment, primary indicators for evaluation, and a plan to embed data collection in the library system: <https://spaces.gatesfoundation.org/docs/DOC-5930>
- [Example] **Overview of Lithuania’s Impact Work:** PPT presentation giving a brief overview of the Lithuanian approach to impact assessment, including research questions, outputs, indicators, evidence, research methods, and the research plan. It was generated as part of the impact assessment in the first Lithuanian public library project, “Libraries for Innovation” (2008-2011): <https://spaces.gatesfoundation.org/docs/DOC-2552>
- [Example] **Lithuanian Baseline Planning Chart:** One-page outline of the Lithuanian approach to baseline data collection showing timing, methods, target groups, sampling methods, sample sizes, and expected outcomes. It was produced as part of the impact assessment in the Lithuanian public library project, “Libraries for Innovation”: <https://spaces.gatesfoundation.org/docs/DOC-2553>

## Road Map Stage 3: IPA Implementation

In this stage, grantees will put all of their planning into action to carry out a baseline study and begin ongoing data collection and reporting. To prepare for this ongoing study, grantees will begin building the capacity of librarians and other stakeholders to collect data, set outcome targets and a data collection timeline, and begin incorporating advocacy activities into long-term planning. This stage also includes regular reporting to GL and stakeholders, and coordination with the advocacy team on how to use impact data in advocacy.

There are seven steps along this path:

- 3.1 Prepare for baseline pilot
- 3.2 Implement baseline study
- 3.3 Analyze results and report on baseline study
- 3.4 Prepare for ongoing study
- 3.5 Implement ongoing study
- 3.6 Analyze data
- 3.7 Report results to GL and stakeholders

### 3.1: Prepare for baseline pilot

- Draft assessment tools and methods to use in the baseline study, including required Performance Metrics and CIMS indicators.
- Conduct a pilot test of these tools and methods.
- Review and refine assessment tools as necessary based on the results of the pilot.

**Establishing a Clear Baseline in Chile:** Chile had implemented several different baseline studies, which can present challenges for future comparisons, so the program team decided to generate a broad baseline study that would combine a range of variables. By clearly defining the survey instrument to be used and gathering both quantitative and qualitative evidence, the baseline study now serves as the start of a longitudinal study that will assess societal changes in the country over a period of decades.



- [Example] **Case Study: Practical Experiences from Piloting and Procurement Baseline Studies:** Case study based on the experience of Latvia and Lithuania in procuring services to carry out baseline surveys for impact assessment: <https://spaces.gatesfoundation.org/docs/DOC-2623>
- [Example] **Lithuanian Technical Specification for Tender of Baseline Study:** <https://spaces.gatesfoundation.org/docs/DOC-2624>
- [Example] **Latvia Information Society Development:** Report prepared by the Latvian team, positioning the impact of the GL project within national goals and in relation to national indicators: <https://spaces.gatesfoundation.org/docs/DOC-2625>

### 3.2: Implement baseline study

- Develop a “terms of reference” document that clearly describes your data collection needs.
- Distribute the terms of reference to potential research vendors and invite them to submit proposals (bids) to conduct the baseline study.
- Review proposals and select a research vendor.
- Commission the baseline study, making sure to review survey instruments to ensure that all of the necessary indicators are included and described the way you have planned.
- Conduct the baseline study.

**Needs Assessment vs. Baseline Study:** Several of the steps described in the IPA Planning stage, including conducting consultations with stakeholders (Step 2.1) and identifying what data are already available (Step 2.3), are sometimes referred to as a “needs assessment.” The needs assessment is essentially a period when grantees collect information to inform what they will measure later and how. While some information collected during the needs assessment may also be collected in the baseline study—such as data about the number of public library users in the country—the main distinction is that a needs assessment is part of the internal planning process, whereas the baseline study is an external research tool used to collect data for later comparison.



- [Example] **South Africa Terms of Reference:**  
<https://spaces.gatesfoundation.org/docs/DOC-6373>
- Five reports from Latvia and five from Lithuania on their impact baseline surveys, each reporting on a different target group:
  - [Example] **Latvia Baseline Study Report: Survey of Libraries:**  
<https://spaces.gatesfoundation.org/docs/DOC-2626>
  - [Example] **Latvia Baseline Study Report: Survey of Librarians:**  
<https://spaces.gatesfoundation.org/docs/DOC-2627>
  - [Example] **Latvia Baseline Study Report: Survey of General Population:** <https://spaces.gatesfoundation.org/docs/DOC-2628>
  - [Example] **Latvia Baseline Study Report: Survey of Library Users:**  
<https://spaces.gatesfoundation.org/docs/DOC-2629>
  - [Example] **Latvia Baseline Study Report: Survey of Children:**  
<https://spaces.gatesfoundation.org/docs/DOC-2630>
  - [Example] **Lithuania Survey of Library Managers:**  
<https://spaces.gatesfoundation.org/docs/DOC-2641>
  - [Example] **Lithuania Survey of Librarians:**  
<https://spaces.gatesfoundation.org/docs/DOC-2642>
  - [Example] **Lithuania Survey of General Population:**  
<https://spaces.gatesfoundation.org/docs/DOC-2643>
  - [Example] **Lithuania Survey of Library Users:**  
<https://spaces.gatesfoundation.org/docs/DOC-2644>
  - [Example] **Lithuania Survey of Children:**  
<https://spaces.gatesfoundation.org/docs/DOC-2645>

### 3.3: Analyze results and report on baseline study

- Report on the results of the baseline to GL and external stakeholders. (See “Reporting Your Impact” in Part III for more details.)
- Coordinate with the advocacy team to develop a plan to use the results of the baseline study to engage target audiences, attract media attention, and begin advocacy. (See “Impact Drives Advocacy” in Part IV for more details.)

**Sharing Baseline Results With Stakeholders in Botswana:** Upon completion of the baseline study in Botswana, the country program team conducted a dissemination workshop to share the results with key stakeholders, including the Department of Library and Information Studies at the University of Botswana; Botswana Library Association; Botswana National Library Service; Ministry of Youth, Sport and Culture; and Ministry of Transport and Communications (especially the Department of Information and Technology). The program team also shared the results with librarians at dedicated workshops conducted for public libraries, and a report of the results was distributed to stakeholders and all public libraries in Botswana.

**Reporting Baseline Results to Build Interest in Turkey:** From the outset of the Librar-e Turkey program, the impact team shared its raw data and reports with various departments of the Ministry of Development to ensure ongoing government interest in the program results. Specifically, the team shared data with the Department of Information Society (which plans and implements the National Information Society Strategy and Action Plan) and the Department of Education and Culture (which allocates funding by government institutions). To make the results of the baseline study available widely to other potential partners, the Librar-e Turkey team reported the results on its website and in three different academic articles and created infographics with some of the baseline results.

### 3.4: Prepare for ongoing study

- Identify the types and levels of support needed to implement the ongoing study of CIMS indicators and other/customized indicators. (A new round of commissioning may be necessary.)
- Engage with stakeholder groups to build local and national capacity (e.g., train librarians and other stakeholders who will be involved in collecting data).
- Set outcome targets based on desired outcomes and results from the baseline study.
- Develop a timeline for data collection, including when you expect to produce and use interim impact evidence, and finalize it with GL.
- Coordinate with the advocacy team to incorporate advocacy activities into long-term IPA planning.
  - Examine baseline data for challenges that could be addressed through specific advocacy interventions (e.g., X% of people do not believe the library has value for them).



### 3.5: Implement ongoing study

- Follow the timeline for data collection established with GL.
  - Collect and report CIMS data annually.
  - Collect and report on PMs at least annually.
  - Collect interim evidence.
  - Gather qualitative evidence (e.g., impact stories and case studies).
- Keep key stakeholders informed of progress and results from ongoing data collection.

**Gathering Qualitative Impact Evidence in Poland:** In addition to collecting quantitative impact data, the Poland country program team decided to gather as much qualitative information (local stories) as possible about the delivery of program services. This type of evidence was important for two reasons: It helped the program team understand more clearly how the program was implemented locally by individual libraries, and it allowed the team to gather evidence of the impact of those services on individual users and libraries for use in advocacy. While the team found librarians very willing and capable of collecting this information, they also used other methods:

- **Surveying librarians about individual success stories**, using very precise instructions about how the stories should be phrased (for instance, “please describe one user who...” or “please write what specifically changed in his life thanks to...”), which resulted in consistent and high-quality stories.
- **Collecting success stories directly from users through our pop-up survey.** This survey included questions like “what was your biggest achievement thanks to the access to the Internet in the library?” Although these stories were often not as complete as those provided by librarians, they represented a much wider and statistically more significant range of users.
- **Asking librarians to provide descriptions of new library activities** they had been able to introduce thanks to participation in the grant program. Again, the program team used very specific questions, seeking information like how many people were involved in each new activity, how long the activity lasted, what partners were involved, how the activity was promoted, and what results were achieved. The team sometimes asked librarians to provide even more descriptive materials, such as presentations, pictures, statements from library users or partners, or short films (though this last item was generally the least polished-looking and the least useful).
- **Collecting stories from library case studies developed by outside researchers.** This method resulted in stories with much greater depth and analysis provided by the researchers, but the number of stories collected was relatively smaller. To better understand how program services had been implemented, the program team commissioned reports based on analysis of these collected stories. For advocacy, the team often used direct quotes from library users in these stories describing the impact of library services on their lives.



- [Guidance] **Collecting Stories and Constructing Case Studies as Impact Evidence:** Outline of the rationale for collecting stories and compiling service case studies as part of impact assessment; describes how service case studies can be prepared, concentrating on choosing cases, collecting the stories, and turning them into service case studies. It describes how stories can be collected from users, again concentrating on choosing the storytellers, collecting the stories, and editing them. Some examples are offered: <https://spaces.gatesfoundation.org/docs/DOC-2539>
- [Sample] **Poland Pop-Up Survey Questions and Methodology:** <https://spaces.gatesfoundation.org/message/2595#2595>
- [Article] **Applying Pop-Up Survey Software to Incorporate Users' Feedback Into Public Library Computing Service Management:** Report on Romania pop-up surveys: <http://www.emeraldinsight.com/journals.htm?articleid=1913591>
- [Report] **Economic Value and Impact of Public Libraries in Latvia:** <http://www.kis.gov.lv/download/Economic%20value%20and%20impact%20of%20public%20libraries%20in%20Latvia.pdf>
- [Guidance] **Presentation on CIMS Integration in Latvia (October 2013):** <https://spaces.gatesfoundation.org/docs/DOC-3459>

### 3.6: Analyze data

- Review the results of impact evaluation and plan how you will put the data into context for stakeholders and other potential audiences:
  - Consider how to help audiences understand the magnitude of a number (for example, how a percentage of library users may translate into a number of people affected nationwide).
  - Identify the economic or social context that audiences should consider when reading the numbers.



- [Guidance] **IFLA Bibliography “Impact and Outcome of Libraries”:** <http://www.ifla.org/publications/publications-associated-with-the-s-e-section>
- [Example] **EU 17-Country Public Library Reports:** <http://tascha.uw.edu/projects/cross-european-survey-public-libraries/>
- [Example] **Perceptions of Public Libraries in Africa:** EIFL perceptions report: <http://www.eifl.net/resources/perceptions-public-libraries-africa-0>

### 3.7: Report results to GL and stakeholders

- Report on the results of ongoing study to GL and external stakeholders. (See “Reporting Your Impact” in Part III for more details.)



- [Tool] **Template for Evaluation Report Writing:** Outline of basic structure for a formal evaluation report, including best practices for each section of the report, based on an example from the Botswana team: <https://spaces.gatesfoundation.org/docs/DOC-6314>



## Road Map Stage 4: Applying the Findings and Embedding IPA

This final stage focuses on strategies to use impact data to both improve the grant program and support the sustainability of impact assessment activities and library services. It includes working closely with the advocacy team to determine how to make the most of impact data, as well as other forms of evidence like impact stories, for use in advocacy. This stage also includes training librarians about the importance of collecting impact data for future advocacy activities.

The last two steps on this path are geared toward the ongoing collection and use of evidence to secure the future of your program:

- 4.1 Apply the findings
- 4.2 Embed the IPA process in your library system

### 4.1: Apply the findings

- Consider how the results of the impact assessment can be used to continuously improve program design or the delivery of program services, to ensure that services are meeting the needs of users.
  - Coordinate with the training team to see if the findings identify any gaps in technology knowledge among library users and staff, and make a plan to adjust training programs as needed.
  - Coordinate with the technology team to see if the findings suggest any needs related to computer and Internet service delivery, and adjust installation plans or identify advocacy opportunities to get more funding to address technology shortages.
  - Coordinate with the advocacy team to tailor impact data for different stakeholders and the media, and plan for impact stories to be used for advocacy.



- [Article] **Toward an Assessment of Public Library Value: Statistics on the Policymakers' Agenda:** Report on evidence and possible implications of library use and appreciation in Latvia:  
<http://www.emeraldinsight.com/journals.htm?articleid=1852530>
- [Guidance] **Using Evaluation Findings to Create Change: Tips and Tricks:**  
<https://spaces.gatesfoundation.org/docs/DOC-6313>

## 4.2: Embed the IPA process in your library system

- Coordinate with key stakeholders in the library community to develop a plan to build and sustain capacity for impact assessment in the library system:
  - Try to build impact assessment into national data collection for libraries.
  - Formalize a system for training librarians to continue collecting impact data for use in advocacy.
  - Work to ensure that these skills are recognized as important by library staff.

**Modernizing Moldova’s Library Reporting System:** In Moldova, the National Library collects government-mandated statistics about public library services and users across the country. Each year, individual libraries submit data to their raion (county) libraries, which send the data to the National Library, which produces an aggregated report—all on paper. The Novateca team is working to streamline this national data collection process using an online reporting tool, which public libraries supported by the grant program are using to send monthly progress reports to Novateca. Since the majority of public libraries in Moldova will eventually be supported by the Novateca program and librarians will be trained to use the online reporting tool, officials from the National Library are interested in the opportunity to begin using the same system to gather their statistics online. The program team is working with representatives from the National Library to develop an online version of the current paper form, with the intent that the National Library eventually use the online reporting tool nationally. In addition to streamlining national data collection now, this partnership supports the long-term sustainability of Novateca data collection, enabling national data about program results to be collected for years to come.



- [Example] **Case Study: Latvian Cultural Map: Embedding IPA Indicators in the National Statistics Process:** In assessing the impact of the Latvian “Father’s Third Son” (FTS) project, data was collected for the first time using customized Web tools. Some of the datasets and methods used will be integrated into the Cultural Map national project. This helps emphasize the national significance of the FTS project, ensures that its key objectives continue to be monitored after it ends, supports its sustainability and advocacy objectives, and provides an exemplary application of the libraries’ improved ICT capacity in the context of eGovernment. The Cultural Map is still under development: <https://spaces.gatesfoundation.org/docs/DOC-2646>
- [Example] **Embedding the IPA Process Into Daily Grant Management in Romania:** <https://spaces.gatesfoundation.org/thread/1569>
- [Example] **Working With Local Administration in Romania:** <https://spaces.gatesfoundation.org/thread/1511>



## Part III: Mastering the Elements of the IPA Process

This section describes the different types of data that impact specialists will collect as part of the IPA process and why they are important. Here you will find the full lists of required metrics and indicators that will form the foundation of your assessment activities, along with a range of additional options, general tips, and best practices for customizing impact assessment to meet your needs. This section also provides guidelines for reporting the data you collect, both to GL and to other stakeholders, to help you clearly communicate your program results.

### GL Metrics and Indicators

While all country grantees are encouraged to collect any data or examples that help them demonstrate progress toward their desired outcomes, the IPA process calls for grantees to track some standard data about the achievements and impact of their work. Grantees will collect and report this data using two related measurement systems:

- **Performance Metrics (PMs)** are a small set of indicators designed to measure the growth of services and technology that grant programs put in place.
- The **Common Impact Measurement System (CIMS)** is a larger set of indicators that quantify the impact that grant programs have on the lives of the people they serve.

By reporting the same measures using common definitions and methodologies, GL and country grantees can:

- **Aggregate data** to determine the total reach and impact of GL country grant programs and enhance their ability to advocate for the importance of public libraries
- **Track data** over time to identify and monitor trends in public library use and reach, and incorporate this information into country grant programs and library services
- **Compare data** across countries to allow countries to learn from one another's successes and challenges
- **Refer to a central, definitive source in communications and advocacy activities**, so there is no confusion about where the numbers come from or how they are calculated
- **Leverage the GL Atlas, a new online library data portal**, to visualize public library data, giving GL and country grantees insight into results as they are reported



The PMs and CIMS were designed in collaboration with GL staff, evaluation experts, and country grantees, including impact and advocacy specialists and country program directors. GL sought grantee feedback on every step of the design process for four reasons:

- To promote a sense of shared ownership and familiarity with the systems among country grantees
- To ensure that the indicators are truly relevant in the context of country program grants
- To ensure that the methodology is practical and not a burden on country grantees
- To leverage country grantee expertise in research, planning, evaluation, and indicator development

Both of these measurement systems are described in more detail below.

## Performance Metrics

Performance Metrics (PMs) are the data points that GL country grantees collect to measure public library activities and services, including direct achievements of a grant program. They include indicators that are considered mainstream and desirable for libraries to be able to demonstrate, like the number of computers installed and the number of library staff who receive formal training. (A complete list of PMs can be found in the Appendix.) The PMs include 21 required metrics and two optional metrics and fall into several key categories:

- **Public library service point metrics** tell us how many libraries a GL grant program reaches. Public library service points include the total number of public library service points providing public access computing. A public library service point is any library facility, fixed or mobile, through which the public library provides a service to the general public.
- **Computers and workstations metrics** tell us the amount of new technology available as a result of the GL program. A workstation is a computer connected to the Internet.
- **Use of workstations metrics** tell us whether library visitors are using the new technology the GL program provided.
- **Visits to public libraries metrics** tell us whether library use changes over time, particularly after the GL program provides new technology.
- **Spending metrics** tell us whether public investment in the country's libraries changes over time.
- **Training metrics** tell us how many library staff and users receive training during the GL program.
- **Library activities metrics** tell us what library visitors are doing.





While most PMs are tied to the delivery of library services and do not reflect the impact of those services, these metrics are essential for impact assessment to occur. For example, the number of people who use workstations in public libraries—one of the most basic PMs—is also arguably the most important because it defines the universe of people whose lives may be changed by using the Internet at public libraries. Understanding the size of this group makes all future impact assessment possible. (See “Reporting Your Impact” below for more detail about PM reporting requirements.)



- [Guidance] **PM Guide:** Detailed explanation of how to collect and report PMs: <https://spaces.gatesfoundation.org/docs/DOC-2661>
- [Tool] **PM Workbook:** Excel document containing all of the PMs, sorted by category, with indicators for each: <https://spaces.gatesfoundation.org/docs/DOC-2837>
- [Guidance] **Web-Based Training on PMs and CIMS:** Includes a full version for impact specialists and research/data vendors and a shorter module designed for country program directors, advocacy specialists, training specialists, and other members of your team: <http://libraryimpact.gatesfoundation.org>
- [Guidance] **Webinar Slides:** PPT presentation for country program directors, advocacy specialists, and impact specialists that explains the basic principles and contents of PMs and CIMS: <https://spaces.gatesfoundation.org/docs/DOC-3062>
- [Guidance] **PM and CIMS Frequently Asked Questions:** Updated as new questions emerge: <https://spaces.gatesfoundation.org/docs/DOC-2665>
- [Guidance] **International Standards Organisation (ISO):** Most of the language used to develop the PMs was derived from ISO definitions. A public preview of the latest version of this resource (ISO 11620:2014, “Information and Documentation – Library Performance Indicators”) is available here: <https://www.iso.org/obp/ui/#iso:std:iso:11620:ed-3:v1:en>
- [Tool] **Data Atlas:** Online data portal that presents PMs and CIMS across countries through a series of reports and graphics, so grantees and partners can visualize and interpret these data and use them in advocacy: <https://spaces.gatesfoundation.org/docs/DOC-6259> or [www.glatlas.org](http://www.glatlas.org) (username: glatlas / password: gl@tlas)

### Common Impact Measurement System (CIMS)

While measuring PMs allows country grantees to track the growth of their services and technology, CIMS indicators enable grantees to understand the outcomes they help individuals and communities realize. CIMS helps demonstrate progress toward a set of desired outcomes across seven areas where public libraries can have an important impact—digital inclusion, culture and leisure, education, communication, economic development, health, and government and governance.



For each of these impact areas, CIMS identifies outcomes that country grant programs can help achieve, a set of indicators for grantees to measure progress toward those outcomes, and a standard methodology for data collection, including actual survey questions for grantees to use in their assessment.

For example:

<b>CIMS Impact Area</b>	Education
<b>Outcome</b>	Library visitors are qualified to get a job
<b>Indicator</b>	Number of library visitors who are qualified to get a job as a result of educational or job-related training opportunities they accessed using public library services (e.g., online education opportunities/programs, training and assistance, workshops, study groups, or learning circles)
<b>Target Population</b>	Random sample of library visitors
<b>Survey Question</b>	<i>Please indicate whether you agree, disagree, don't know, or not applicable: "As a result of resources, information, and opportunities I accessed using public library services (e.g., computers, Internet, Wi-Fi, or other technology; assistance or training from library staff or outside experts), I am better qualified to get a job than I would be if I hadn't received these services"</i>



## Important CIMS Principles

While CIMS represents a formal structure for all country grant programs, it was designed to seek a balance between what is ideal to know and what is feasible to measure (a concept called “practical validity”). Each country grantee must feel comfortable that the data they collect paints an accurate picture of public library users in their country. To make CIMS manageable for country grantees with different levels of research experience and capacity, GL worked with grantees and evaluation experts to establish some core principles for the system:

- **CIMS includes required and optional indicators.** There are 41 required CIMS indicators for which all country grantees gather data, and 53 optional indicators that country grantees may use if relevant to their program’s focus area. (A complete list can be found in the Appendix.)
- **CIMS is designed to be manageable.** The 41 required indicators translate into only 20 survey questions, a fraction of the size of surveys that country grantees already conduct. Grantees determine the format of the survey (paper or electronic), and GL recommends that grantees choose an external organization, such as a survey or market research firm, to collect the data. GL is responsible for organizing and displaying the data online. (See “Reporting Your Impact” below for more detail about CIMS reporting requirements.)
- **CIMS emphasizes contribution, not causation.** GL recognizes that while several indicators together can point toward change, no single indicator can measure change alone. It can be extremely difficult to isolate public access to information from other factors that contribute to change in a community or a country. CIMS indicators are designed to help GL country grantees understand whether their efforts are one of the causes of improvements in the lives of library users, not whether (or how much) these efforts are directly or solely responsible.



- [Guidance] **CIMS Guide:** Detailed explanation of how to use, measure, and report CIMS indicators. It includes a sample “Survey of Library Visitors With All Required Indicators Included,” which grantees can translate into local languages: <https://spaces.gatesfoundation.org/docs/DOC-2662>
- [Tool] **CIMS Workbook:** Excel document listing all of the required and optional CIMS indicators, sorted by impact domain, with indicators for each: <https://spaces.gatesfoundation.org/docs/DOC-2663>
- [Guidance] **CIMS Brochure:** Printable brochure that explains the basics of Global Libraries and CIMS to a general audience: <https://spaces.gatesfoundation.org/docs/DOC-5220>
- [Guidance] **Web-Based Training on PMs and CIMS:** Includes a full version for impact specialists and research/data vendors and a shorter module designed for country program directors, advocacy specialists, training specialists, and other members of your team: <http://libraryimpact.gatesfoundation.org>
- [Guidance] **Webinar Slides:** PPT presentation for country program directors, advocacy specialists, and impact specialists that explains the basic principles and contents of PMs and CIMS: <https://spaces.gatesfoundation.org/docs/DOC-3062>
- [Guidance] **PM and CIMS Frequently Asked Questions:** Updated as new questions emerge: <https://spaces.gatesfoundation.org/docs/DOC-2665>
- [Tool] **Data Atlas:** Online data portal that presents PMs and CIMS across countries through a series of reports and graphics, so grantees and partners can visualize and interpret these data and use them in advocacy: <https://spaces.gatesfoundation.org/docs/DOC-6259> or [www.glatlas.org](http://www.glatlas.org) (username: glatlas / password: gl@tlas)

- [Guidance] **Sample Survey of Library Visitors With All Required and Optional Indicators Included:** <https://spaces.gatesfoundation.org/docs/DOC-2836>
- [Guidance] **Presentation from American Evaluation Association:** PPT slide deck describing the process of how CIMS was developed in collaboration with GL grantees: <https://spaces.gatesfoundation.org/docs/DOC-3512>
- [Example] **Examples of CIMS Translations:** Sample survey question demonstrating how the Colombia program team translated various CIMS terms into Spanish: <https://spaces.gatesfoundation.org/docs/DOC-6344>

## Customizing Impact Assessment for Your Program

GL country grantees represent diverse communities around the world that face different and often complex local needs. Therefore, in addition to the standard data requirements outlined in PMs and CIMS, each country grantee will develop a plan to collect other data relevant to their program's focus area. For example, outcomes that may be priorities for specific grantees but are outside of the PMs and CIMS frameworks could include:

- Farmers are able to find more timely and relevant agricultural information.
- Targeted sectors of the community are able to make smart use of health information.
- Businesses have the information they need to make better decisions.
- Marginalized groups feel more included in the community.

Each grantee will decide on the locally relevant impacts that they want to achieve and formulate unique indicators. Grantees are encouraged to draw inspiration from two existing resources: the list of **optional CIMS indicators** and the list of **omitted indicators** that were proposed by GL staff, consultants, and grantees when CIMS was developed but were not ultimately used in the framework (see links below). Key questions for consideration when choosing customized indicators include:

- Are there **priority impact areas** that the grant program will emphasize or test?
- Are there specific **types of impact** that are especially important to measure (e.g., knowledge and skills, attitudes and perceptions, behavior, quality of life, or broader social and economic change)?
- Is the grant program trying to achieve some change across most library users, or are there **specific groups or individuals** in the community that are important to target?
- Are there changes you want to see in **libraries or librarians**?
- What changes would be most relevant to the community, government, and other **stakeholders**?
- How will these indicators be included in **planned data collection**?

Taking these questions into account, examples of indicators that could address specific program focus areas may include:

- The number of library visitors who report saving money from using e-government services at the library
- The percentage of new library visitors who come from targeted demographic groups
- The number of individuals or organizations that use the library to establish their own Internet presence, such as an email address or website



Finally, the following good practices should inform any customized impact assessment:

- When selecting indicators, it is important to consider the balance between the different types and levels of impact as well as the balance between short-term and long-term impact. Too much long-term, far-reaching impact will be difficult to achieve and monitor; too much short-term, limited impact will not allow grantees to explore the full potential of the country grant program.
- Carefully choose elements that, when taken together, will give a clear picture of what the country grant program is trying to achieve. Avoid spending unnecessary resources on assessing elements that will not add much to the picture.
- Grantees cannot always predict the changes that a program will make. For example, access to the Internet in public libraries may affect school-age students quite differently from the elderly or the unemployed, and grantees may see results in the impact data—positive or negative—that they did not expect. This is called divergence. Rather than being a sign of failure, divergence is an important clue about other factors that could be at work within the evaluation or in the community. Monitoring divergence can help grantees understand whether it could be caused by methodology (which can be adjusted if needed) or other factors (which can help the grant program team better understand and ultimately address community needs).

Below is an example of one customized indicator that the Poland program team identified to address a local priority: better integration of local communities and excluded groups.

<b>Outcome</b>	Better integration of local communities and excluded groups
<b>Indicators</b>	<ul style="list-style-type: none"> <li>• Increased number of library users among the unemployed, soon-to-be retirees and retirees, children from poorer families; change in their level of use of new library services</li> <li>• Increased number of library users among the disabled and change in their level of use of new library services</li> </ul>
<b>Target Populations</b>	<ul style="list-style-type: none"> <li>• Survey of inhabitants</li> <li>• Survey/self-evaluation of librarians</li> </ul>

### Assessing the Economic Value of Public Libraries in Ukraine

- In Ukraine, the Bibliomist impact team identified a great need to demonstrate the return on investment (ROI) of public libraries to secure ongoing funding. The team chose a number of indicators to identify the most important and popular library services (e.g., information technology trainings, communication via Skype) and used usage data gathered by libraries to calculate the benefits of these services in monetary terms. The impact team calculated library benefits based on alternative costs, which are the expenses that library users would have incurred if they received a comparable service at another location (like a business or non-profit organization) in the same city. For example, it was calculated that during the Bibliomist grant program, library users saved about US \$4.8 million on phone calls due to free use of Skype in Bibliomist-supported libraries.
- The Bibliomist impact team also focused on enabling all public libraries in Ukraine to conduct ROI analysis. The team developed an instruction manual on calculating ROI for individual library services based on library costs and benefits, and conducted several trainings for library directors and staff.
- The Bibliomist team published the results from the collected ROI studies, along with the instruction manual, which will be available to more than 18,000 public libraries in Ukraine for use in advocacy efforts. The team shared the findings with key stakeholders in Ukraine, such as the Ministry of Culture and the Ukrainian Library Association.



- [Example] **Poland Impact Assessment Framework:** Sample framework outlining the scope of the impact assessment, primary indicators for evaluation, and a plan to embed data collection in the library system: <https://spaces.gatesfoundation.org/docs/DOC-5930>
- [Guidance] **Workshop on Building Impact Indicators:** PPT slide presentation about how to identify useful impact objectives and indicators: <https://spaces.gatesfoundation.org/docs/DOC-2534>
- [Guidance] **Omitted CIMS Indicators:** List of unused indicators from the CIMS planning process, for teams that want to dig deeper into a certain area of impact: <https://spaces.gatesfoundation.org/docs/DOC-2666>
- [Guidance] **Outcome Mapping: Building Learning and Reflection into Development Programs:** E-book on identifying desired outcomes and developing indicators, from the International Development Research Centre: [http://www.outcomemapping.ca/download.php?file=/resource/files/OM\\_English\\_final.pdf](http://www.outcomemapping.ca/download.php?file=/resource/files/OM_English_final.pdf)
- [Guidance] **International Standard Methods and Procedures for Assessing the Impact of Libraries (ISO 16439:2014):** Definitions of terms for impact assessment of libraries and specifies methods for such assessment: [http://www.iso.org/iso/catalogue\\_detail.htm?csnumber=56756](http://www.iso.org/iso/catalogue_detail.htm?csnumber=56756)
- The following is a series of brief guides with practical steps for various data collection activities:
  - [Guidance] **Best Practices in Data Collection Tool Design:** <https://spaces.gatesfoundation.org/docs/DOC-6361>
  - [Guidance] **Developing a Survey Instrument:** <https://spaces.gatesfoundation.org/docs/DOC-6347>
  - [Guidance] **Developing a Direct Observation Guide:** <https://spaces.gatesfoundation.org/docs/DOC-6348>
  - [Guidance] **Developing an Interview Guide:** <https://spaces.gatesfoundation.org/docs/DOC-6349>
  - [Guidance] **Developing a Focus Group Guide:** <https://spaces.gatesfoundation.org/docs/DOC-6350>
  - [Guidance] **Creating a Research Sample:** <https://spaces.gatesfoundation.org/docs/DOC-6315>
  - [Guidance] **Data Entry and Storage:** <https://spaces.gatesfoundation.org/docs/DOC-6316>
  - [Guidance] **Data Collection Instrument Decision Making Matrix (Graphic):** <https://spaces.gatesfoundation.org/docs/DOC-6312>



The following chart summarizes the main features and differences between PMs, CIMS, and other customized indicators.

	PMs	CIMS	Other Indicators
<b>What It Measures</b>	Technology and services provided by the country grant program	Impact on the lives of people served by the country grant program ( <b>standardized</b> across GL country grants)	Impact on the lives of people served by the country grant program ( <b>customized</b> for each GL country grant)
<b>History</b>	PMs were originally developed in 2008. GL refined and clarified the definitions and data collection methodologies in 2013.	GL introduced CIMS in 2013.	GL grantees have always identified customized indicators based on the outcomes their programs are designed to achieve.
<b>Categories</b>	<ul style="list-style-type: none"> <li>• Public library service points</li> <li>• Computers and workstations</li> <li>• Use of workstations</li> <li>• Visits</li> <li>• Spending</li> <li>• Training</li> <li>• Library activities</li> </ul>	<ul style="list-style-type: none"> <li>• Digital inclusion</li> <li>• Culture and leisure</li> <li>• Communications</li> <li>• Education</li> <li>• Economic development</li> <li>• Health</li> <li>• Government and governance</li> </ul>	Any
<b>Number of Indicators</b>	21 required; 2 optional	41 required; 53 optional	Any
<b>Sample Indicator</b>	Number of <b>physical visits</b> to all public libraries	Number of library visitors who learn <b>basic computer skills</b> as a result of public library services	Number of library visitors who report <b>saving money from using e-government services</b> at the library
<b>Data Sources</b>	National statistics, GL implementation data, library records/reports, survey of library visitors	Survey of library users, administered by an external organization, such as a survey or market research firm	Any
<b>How Data Are Reported</b>	Grantees are expected to share these data with their program officer, usually at the time the annual report is due. GL's data managers have developed an optional PM template that makes this easy.	Grantees are expected to share raw data sets with their program officer and GL's data manager.	Grantees have the option of sharing the raw data with GL and GL's data manager.

## Reporting Your Impact

### Sharing Impact Data With Global Libraries

Country grant programs regularly report to GL on their impact to help paint a picture of the overall progress of their work and the collective work of all grantees. Grantees will work with their program officer to establish a schedule and guidelines for program reporting early in the grant period. This will include standard grant reporting on an annual basis, often accompanied by interim reports.

Important notes about reporting that are specific to PMs and CIMS include:

- **CIMS and PMs do not replace other locally relevant impact assessment.** The collection of CIMS and PM data does not preclude each grant team from conducting other impact assessment activities. For example, some grantees survey library staff and directors, conduct focus groups with hard-to-reach groups, carry out special children's studies, or survey the general population in targeted municipalities or the entire country. Impact assessment in these areas, as appropriate to the program, is encouraged.
- **Country grantees will collect and report on PMs at least annually.** These reports should coincide with annual grant reporting. It is recommended that collection of this data be planned locally to match either 12-month program periods or the collection of public library statistics (usually this will be the calendar or the fiscal year).
- **Country grantees will collect and report CIMS data annually.** Grantees will collect data using a new set of survey questions administered in public libraries by an external organization, such as a survey or market research firm. GL program officers are prepared to provide assistance to grantees throughout the process, and grantees may request to work with GL technical assistance (TA) providers to customize an implementation plan. (See Part I for a description of available TA services.)
- **CIMS can be incorporated into ongoing reporting.** Established grantees can conduct their existing data collection efforts and CIMS data collection separately, or they can incorporate CIMS data collection into existing data collection efforts. If CIMS is incorporated into existing data collection efforts, grantees should follow these assumptions:
  - **Maintain the status quo for existing data collection.** Data collection efforts should remain consistent so that data can be compared over time.
  - **Omit CIMS indicators and survey questions that are similar or identical to what is currently collected.** This prioritizes the collection of data that is comparable over time and avoids redundancies in data collection. GL understands that there may be several CIMS indicators for which established grantees do not collect data.
  - **Add CIMS indicators and survey questions that do not overlap with current data collection.** Assess indicators and questions that you currently collect and add only those CIMS indicators and questions that do not overlap with what is currently collected.

Following these assumptions should enable grantees to continue their current data collection processes and minimize disruptions to systems in place.

## Sharing Impact Data With Other Stakeholders

In addition to reporting PMs and CIMS data to GL, all country grant programs will at some point present their findings to local government leaders, partners, library staff, or the public. Sharing impact data with these external stakeholders may involve a different type of reporting than grantees use with GL. Depending on the audience, it may not take the shape of a report at all, and instead focus on a few carefully selected data points used in other types of materials or communications.

GL recommends that data collection and reporting align with local practices in each country, so that stakeholders in each country will find them useful and the same reporting format can continue beyond the life of the grant. This should support the sustainability of impact assessment activities by enabling data comparisons to be made over time and providing library systems with the evidence they need for ongoing advocacy efforts.

The following are some basic guidelines for sharing impact data with stakeholders in a useful and compelling way, regardless of format. More information about using impact data to develop customized messages for different audiences is available in the GL Advocacy Guide.

- **Identify the internal goal.** Make sure that the program team has a clear understanding of the purpose for sharing its impact data. Is the goal to raise awareness about libraries generally or about a specific issue? Is the goal to build a partnership or seek long-term funding? Articulating this goal will help the team make decisions about what information to present, how, and to whom.
- **Consider the primary audience.** Begin by identifying the most likely audience for the report and reflecting on their current needs and priorities. Not every audience will have the same prior knowledge about public libraries and access to technology, or be interested in the same type of impact data. Think about what the most important points are for each audience to understand and what information will be of interest and relevant to them.
- **Provide a summary up front.** Some audiences may be interested in a full report, but they still need help understanding the most important points quickly. The key takeaways of a report should be listed in a short executive summary or introduction of one to two pages. This section should include a very brief overview of the desired outcomes of the grant program, the purpose and method of the evaluation, high-level findings, and any key recommendations resulting from the findings. Even short reports can benefit from a brief introduction that captures the reader's attention and entices them to learn more.
- **Put results into context.** Offer the reader contextual clues to help them interpret the findings. Was anything about the findings surprising? How do the findings compare to other related statistics? What other environmental factors could have influenced the findings? How will the findings affect the grant program's work going forward?
- **Make the results easy to understand.** For best results, be concise and use simple language that a person without a background in data collection would easily understand, avoiding acronyms and technical jargon. In a document, use basic formatting elements to help the reader understand what they are looking at, such as subtle color and text formatting to call attention to important information, and bullet key points when possible.
- **Provide a call to action.** Tell the audience clearly what they should do with the information and where they can go to find more information.
- **Include the most detail at the end.** If submitting a formal report, details about the evaluation design are important for accountability and transparency, but may make the report hard to read. Add an appendix for tables, complete results, and a detailed description of the data collection methodology and tools.



- [Tool] **Template for Evaluation Report Writing:** Outline of basic structure for a formal evaluation report, including best practices for each section of the report, based on an example from the Botswana team: <https://spaces.gatesfoundation.org/docs/DOC-6314>
- [Example] **Indonesia CIMS Survey Presentation:** PPT slide presentation on the Indonesia program’s implementation of CIMS (June 2014): <https://spaces.gatesfoundation.org/docs/DOC-5903>
- [Example] **GlobAl Libraries – Bulgaria Program Final Impact Assessment Study:** Sample report evaluating the achievements of the Bulgaria program over five years: <https://spaces.gatesfoundation.org/docs/DOC-5218>
- [Example] **GlobAl Libraries – Bulgaria Program Key Findings From the Final Impact Assessment Study:** PPT slide presentation: <https://spaces.gatesfoundation.org/docs/DOC-5219>
- [Example] **GlobAl Libraries – Bulgaria Program Video on Program Impact on Library Users:** Short video on how the Bulgaria program influenced local communities and helped improve the lives of ordinary people: <https://spaces.gatesfoundation.org/docs/DOC-5582>



## Part IV: Thinking Beyond the IPA Process

This section focuses on how grantees will apply the results of the IPA process to support library advocacy, sustain impact assessment activities in their country, and ultimately help ensure that program results last long after the life of a country program grant.

### Sustaining Our Results

GL is committed to ensuring that public libraries in each grantee country continue to improve the lives of the people and communities they serve beyond the life of a grant. We define sustainability across all of our work as the degree to which positive results from grant programs continue over time—whether those results are achieved through new library services, new practices or partnerships within the library community, or new policies or funding that support public libraries. This definition emphasizes the ultimate goal of continuity of outcomes or impacts, rather than the continued operation of individual project teams, projects, or organizations.

Some indications that the positive results from grant programs are being continued long term may include:

- Additional libraries, beyond those originally funded by GL, provide public access to computers and the Internet, and new library services are offered.
- Library staff have the knowledge and skills to develop and adapt library services to meet changing community needs.
- A national or local managing group of some kind is in place and provides oversight for regular review of the computer and Internet service quality in public libraries.
- Public libraries continually improve their public access programs and services to meet the changing needs of their communities.
- Governments or other major funders continually reinvest in public libraries to maintain and upgrade computer and Internet services.

There are many factors that go into achieving this long-term vision for public libraries. For instance, librarians must embrace technology and have a clear understanding of the needs of their communities; strong partnerships with library stakeholders must be in place; and government leaders must appreciate the value of public libraries.

**Impact specialists can help support this vision by implementing the IPA process during their program grant with the goal of sustaining key impact assessment activities after the grant ends.**

## **Sustainability of Impact Assessment Activities**

GL believes that sustainability is achieved when the practice of planning, collecting, evaluating, and learning from the impact of library services is embedded in the culture of a library system. When library leaders and staff are comfortable collecting impact data and understand its value, they can use it to continuously develop new services and advocate for long-term, sustainable funding.

The extent and format of ongoing impact assessment activities will vary based on local circumstances. While each grant program is unique, the following are basic guidelines to plan for the sustainability of impact assessment activities throughout the IPA process:

- **Start planning for sustainability of impact assessment at the beginning of the grant program.** During Stage 1 of the IPA process (pre-planning/learning), grantees should articulate for themselves and their program officer how they would like to support future and ongoing library impact assessment in their country. This statement does not need to be formal or comprehensive, just a summary of how the grant team would like the investments of its impact assessment program to be best used after the program is complete (for instance, which stakeholders may want and use the raw data collected). This will help guide decision making as grantees proceed through the IPA process.
- **Set realistic expectations with stakeholders about sustaining impact assessment.** In Stage 2 (planning), grantees will consult with key stakeholders to solidify the desired outcomes of the grant program and make a plan for how impact data will be collected. These conversations are essential to help program stakeholders feel that they have ownership and the program meets their needs, because they are the ones who will continue the assessment work when the program grant ends. Grantees and stakeholders should have an open dialogue about when the grant program will end, what types of impact data should be collected in the long term, and who will collect it.

**Collecting CIMS Data:** GL developed CIMS to be used by country grantees and the GL team, and this methodology might not be practical after a grant program ends. GL will consider requests to provide post-grant support to help former grantees, government agencies, or other partners continue to collect the CIMS data.

- **Align grant reporting with local practices.** While GL provides reporting guidelines for country grants, when grantees begin collecting and reporting on impact data in Stage 3 (IPA implementation), they should also consider the commonly accepted reporting format in their country and align their efforts accordingly. This will support the sustainability of impact assessment activities by enabling data comparisons to be made over time.

**Sustaining Pop-up Surveys in Romania:** When designing its library computer pop-up survey, the Biblionet team in Romania consulted with experienced librarians to understand what they considered to be ideal measurements and incorporated their suggestions into the design. As the grant program came to an end, those librarians were eager to take over implementation of the pop-up survey and use it in the future. A group of 10 volunteer librarians were trained to operate the survey after the grant ends and will continue to send data about the impact of their work to local government officials.



- **Cultivate a network of stakeholders, including library managers and staff, partner organizations, and statistical agencies.** In many cases, library staff who take on impact assessment in Stage 4 (applying the findings and embedding IPA) will do so on a volunteer basis and will need basic training as well as support. When professional networks are formed outside of the grant program, the members support each other, collaborate on projects, engage in ongoing discussion about new or evolving needs, and work together to solve problems. Grantees can develop tools (e.g., customizable survey instruments) to help set these groups up for success.

**Establishing a Local Work Group in Romania:** The Biblionet program in Romania created a local Impact Work Group in 2010 to create more opportunities for the grant program team to interact with librarians, help them learn about impact assessment at their own pace, and show how impact data can be used in a practical way rather than a formal, theoretical training. Four years later, the group is poised to sustain impact assessment activities in Romania, and the members feel confident in their ability to train others.

- **Periodically revisit the sustainability plan.** Grantees recommend frequently pausing throughout the IPA process to assess how program decisions may support or hinder the sustainability of impact assessment activities. For example, grantees may ask themselves: Will the results of this assessment activity be useful to libraries in the long term? Will this tool or methodology be useful after the grant ends? Which partner or stakeholder has experience with this topic and could eventually take over its evaluation? Are the original stakeholders still interested in supporting this project after the grant ends, or is there a need to adjust the sustainability plan?



– [Guidance] **Draft Sustainability Framework:** Informal list of potential indicators of sustainability for grantees to consider, adapted from USAID and the definition of sustainability developed by country program directors: <https://spaces.gatesfoundation.org/message/3144#3144>

## Impact Drives Advocacy

### What Is Advocacy and Why Is It Important?

GL defines advocacy as “the actions individuals or organizations undertake to influence decision making at the local, regional, state, national, and international levels that help create a desired policy or funding change in support of public libraries.”

Advocating for policies and government funding for public library services is essential to maintaining the results achieved during the GL grant program. This priority is reflected in the IPA process—after discerning local needs, designing services to meet these needs, and measuring their progress, grantees will use evidence of the grant program’s impact to demonstrate the value of public libraries to decision makers.

### Using Impact Data in Advocacy

As with impact assessment activities, each country grant program will develop and implement an advocacy plan and work throughout the life of the grant to ensure that advocacy becomes a permanent part of the library system after the grant ends, driven by library staff and leaders. Library staff in each GL grantee country are trained in advocacy concepts and skills, and equipped with tools to help them seek policy and funding change at the national and local levels. One of the most important tools in this arsenal is information about the positive impact public libraries have on the lives of people in their community.

**Using Impact Data to Secure Government Funding in Chile:** The BiblioRedes program in Chile used impact data to support library advocacy, secure continued government support, and gain greater visibility for public libraries.

- **They designed a program that met the government's needs:** From 2001 to 2004, the Directorate of Libraries, Archives, and Museums (DIBAM) in Chile implemented BiblioRedes, a project that provided public access to computers, the Internet, and information technology training services in public libraries. The digital divide was felt clearly as a problem at the time, and BiblioRedes designed their work as an answer to this problem.
- **They identified indicators to demonstrate their contribution to addressing the problem:** One of the most important components of BiblioRedes was the implementation of an impact assessment study, the first of its kind in Chile. The indicators chosen included the number of new library users from a target population, the number of people who participated in trainings at the library, and the number of computer access sessions.
- **They ran a far-reaching impact evaluation:** The BiblioRedes team used the evaluation to both gauge the true scope of the digital divide in Chile and assess the reach and perceived value of BiblioRedes services. The results showed that computer access increased from 19.9 percent to more than 67 percent between 2003 and 2005, and Internet use increased from 14.6 percent to 88 percent during the same time period. Users' perceptions of their own competence in information and communication technology also increased significantly.
- **They used the impact data to advocate to government officials:** BiblioRedes shared the results of its impact study with high-ranking leaders in Chile and the staff of various ministries and private companies. Between 2004 and 2006, the team attended official meetings, hosted press conferences, spoke on the radio, produced brochures and news articles, and implemented other public marketing campaigns to share the results. The goal was to make BiblioRedes and the digital divide problem they were solving more visible in the entire political sphere.
- **Results:** The BiblioRedes team's use of impact data to advocate for ongoing government support paid off. The Ministry of Education recommended that the Ministry of Finance evaluate the program in 2006, and the evaluation panel recommended that BiblioRedes become a government-funded program, awarding BiblioRedes 100% of its operating budget (US \$4.48 million). To cover growing services and ever-growing numbers of libraries, the 2010 budget grew to US \$5.99 million.

Advocacy is a process that starts with research and planning. Impact and advocacy specialists should work together closely to identify local government needs and priorities, incorporate them in the program's desired outcomes, and define the type of impact data that will be most useful in advocacy activities. For a more detailed description of GL's approach to advocacy and the role of the advocacy specialist, please see the GL Advocacy Guide.

## Using IPA to Overcome Common Library Challenges

Here are several examples of challenges that libraries may face that hinder their ability to improve the lives of the people and communities they serve—and how the IPA process can help address these challenges:

Library Challenge	IPA Approach to Address Challenge
Inadequate funding; libraries cannot afford the cost of the goods and services they need to support the community	Grantees, library staff, and stakeholders can use data about the impact of library services to advocate for national or local government to create new funding mechanisms for libraries.
High librarian turnover/lack of leadership	Grantees and library staff can use data about the impact of library services to reinforce the importance of library staff, raise the visibility of the profession, and recruit motivated library staff and leaders.
Outdated computers or limited broadband access throughout the library system	Grantees and library staff can use data about the impact of library broadband access to advocate for policies or guidelines that determine how often technology should be replaced, ensure that users have sufficient access, and/or require Wi-Fi capabilities, which would increase the number of people benefiting from library services.
Library services do not align well with national or local officials' priorities and therefore lack needed political support	Grantees can use government stakeholder consultations during the IPA planning process to identify government priorities and align the grant program's focus area with those priorities.
Library services do not align with common community needs and therefore lack needed public support	Grantees can use consultations with community stakeholders during the IPA planning process to identify community needs and work with those stakeholders to design services that will meet those needs.



- [Guidance] **Global Libraries Advocacy Guide:** Companion piece to this guide, developed to describe and support the activities of GL advocacy specialists: <https://spaces.gatesfoundation.org/docs/DOC-1999>
- [Guidance] **Using Evaluation Findings to Create Change: Tips and Tricks:** <https://spaces.gatesfoundation.org/docs/DOC-6313>
- [Tool] **Delivering Persuasive Advocacy Messages:** This worksheet is designed to help grantees identify stakeholders and craft customized advocacy messages, based on the most compelling information (including impact data) for each audience: <https://spaces.gatesfoundation.org/docs/DOC-6362>
- [Article] **Advocacy and Evidence for Sustainable Public Computer Access: Experiences From the Global Libraries Initiative:** <http://www.emeraldinsight.com/journals.htm?articleid=1939787>
- [Article] **Real Life Impact of the Global Libraries – Biblionet Romania Program:** <http://www.emeraldinsight.com/doi/full/10.1108/14678041011026900>

# Part V: Appendix of Impact Assessment Resources

## Complete List of Performance Metrics (required and optional)

### Public Library Service Points

1. Total number of public library service points
2. Total number of public library service points providing public access computing
3. Total number of public library service points providing public access computing that are supported by the GL grant
4. Total number of public library service points providing public access computing that are supported by all other sources

### Computers and Workstations

5. Total number of workstations in which the computer was paid for by GL and the (one-time cost of) Internet connection or upgrade was paid for by other sources
6. Total number of workstations (computers with Internet) paid for by GL
7. Total number of computers paid for by GL that are not connected to the Internet
8. Total number of workstations paid for by all other funding sources
9. Total number of workstations in which the computer was paid for by other sources and the (one-time cost of) Internet connection or upgrade was paid for by GL

### Use of Workstations

10. Metrics related to workstation use rate
  - a. Total hours all workstations in the GL system are in use
  - b. Total possible hours all workstations in the GL system could be in use
11. Number of unique users of workstations in public libraries

### Visits

12. Number of physical visits to public libraries
13. Total number of repeat visitors to public libraries
14. Number of virtual visits to public libraries (optional)

### Spending

15. Total amount of GL funding spent by grantee
16. Total amount of funding from non-GL sources spent on general library services
17. Total amount of funding from non-GL sources spent on public access computing in public libraries
18. Metrics related to in-kind donations
  - a. Number of libraries that receive technology donations (e.g., hardware, software)
  - b. Number of libraries that receive staff capacity donations (e.g., a person provides assistance to the library willingly and without pay)
  - c. Number of libraries that receive capital donations (e.g., buildings, infrastructure)

## Training

19. Total number of library staff members
20. Metrics related to library staff training
  - a. Total number of library staff who receive formal training
  - b. Total number of library staff who receive formal training in technology (such as basic computer skills, Internet skills, e-commerce), whether once or multiple times
  - c. Total number of library staff who receive formal training in advocacy, whether once or multiple times
  - d. Other, please specify
21. Metrics related to library visitor training
  - a. Total number of individuals trained through formal training (not including informal individual user assistance) supported by GL
  - b. Total incidences of formal training supported by GL
  - c. Total incidences of informal assistance provided by the library staff in response to a need that arises for a library visitor

## Library Activities

22. Total number of loans of library materials
23. State of training of public library staff (optional)

## Complete List of CIMS Indicators (required and optional)

### Digital Inclusion

1. Number of library visitors who learn basic computer skills (e.g., turning computer on/off, using a mouse) as a result of public library services (e.g., Internet, computers, training or assistance from library staff or outside experts)
2. Number of library visitors who learn intermediate computer skills (e.g., using Office products, conducting advanced searches online, using online services like e-banking, paying bills, or purchasing goods online) as a result of public library services (e.g., Internet, computers, training or assistance from library staff or outside experts)
3. Number of library visitors who learn general Internet skills (e.g., navigating websites, email, online searches, browsing, Skype) as a result of public library services (e.g., Internet, computers, training or assistance from library staff or outside experts)
4. Number of library visitors who first used the Internet at the public library
5. Number of library visitors who use the Internet at the public library
6. Number of library visitors whose use of technology (e.g., computer, Internet, WIFI, e-books) has increased as a result of public library services (e.g., Internet, computers, training or assistance from library staff)
7. Number of library visitors who create online content (e.g., posting on a wall or comment board, blogging, updating an online profile, uploading photos, designing websites or Web content) using technology at the public library (e.g., WIFI, computer, Internet)



8. Number of library visitors who save money as a result of technology provided by the public library (e.g., by using WIFI or Skype and saving on technology and communication costs, by purchasing goods or completing government forms online and saving on travel costs or because prices are cheaper online)
9. Number of library visitors from marginalized groups whose use of technology (e.g., computer, Internet, WIFI, e-books) has increased as a result of public library services (e.g., Internet, computers, training or assistance from library staff)
10. Number of all Internet users for whom the library is the only free point of access to the Internet
11. Number of public library Internet users, by gender and by age
12. Number of library visitors using technology at the public library (e.g., WIFI, computer, Internet) to access information related to each domain area (i.e. Culture and Leisure, Education, Communication, Economic Development, Health, Government & Governance)

Optional:

- Number of library visitors who learn advanced computer skills (e.g., software engineering, website development, networking and security, database and information management, computer hardware repair, scientific computing) as a result of public library services (e.g., Internet, computers, training or assistance from library staff or outside experts)
- Number of library visitors who learn how to send and receive emails with attachments as a result of public library services (e.g., Internet, computers, training or assistance from library staff or outside experts)
- Number of library visitors who are confident in their ability to use computers or the Internet as a result of public library services (e.g., Internet, computers, training or assistance from library staff or outside experts)
- Number of library visitors from marginalized groups who learn general Internet skills as a result of public library services (e.g., Internet, computers, training or assistance from library staff or outside experts)
- Number of library visitors who first used a computer at the public library
- Number of individuals regularly using the Internet at the public library
- Number of low-income Internet users in public libraries
- Number of public library Internet users from marginalized groups

### **Culture and Leisure**

13. Number of library visitors who are aware of community or civic activities as a result of technology provided at the public library (e.g., WIFI, computer, Internet, Facebook)
14. Number of library visitors who use technology at the public library (e.g., WIFI, computer, Internet, Facebook) to learn about the news
15. Number of library visitors who are involved in their community as a result of the services provided at the public library (e.g., technology, workshops or events held at the library)

Optional:

- Number of library visitors who are aware of and/or promote leisure activities, events and clubs as a result of technology provided at the public library (e.g., Internet—including use of Facebook or social media, WIFI)
- Number of library visitors who access entertainment (e.g., listening to music, watching films, playing games) using technology at the public library
- Number of library visitors who use technology at the public library to preserve their culture (e.g., by planning or promoting cultural heritage or language events, by creating or sharing cultural information)

## **Education**

16. Number of library visitors who use public library services (e.g., technology, physical space for meetings or study sessions, informal training or assistance by library staff or external experts) to participate in informal learning opportunities (e.g., free courses online or in-person, training sessions, study groups or learning circles)
17. Number of students who use public library services (e.g., WIFI, computer, Internet, physical space, tutoring program provided at library) to complete their homework
18. Number of library visitors who read as a result of the technology at the public library (e.g., WIFI, e-books, Internet—including use of Facebook or other social media sites)
19. Number of library visitors who are qualified to get a job as a result of educational or job-related training opportunities they accessed using public library services (e.g., online education opportunities/programs, training and assistance, workshops, study groups or learning circles)
20. Number of students whose academic performance has improved as a result of public library services (e.g., WIFI, computers, Internet, assistance or training)
21. Number of library visitors whose earnings have increased as a result of educational opportunities (e.g., free courses, training, online courses, postsecondary programs) they accessed using public library services (e.g., WIFI, computer, Internet, physical space, training or assistance)

Optional:

- Number of individuals who use technology at the public library to search for informal education resources (e.g., free courses online or in-person, training sessions, study groups or learning circles)
- Number of library visitors who seek education-related information for others (e.g., on formal or informal learning opportunities, to help tutor others or assist others with their homework) using public library services (e.g., WIFI, computer, Internet, training or assistance from library staff or outside experts)
- Number of library visitors who teach others how to access informal education resources (e.g., free courses online or in-person, training sessions, study groups or learning circles)
- Number of library visitors who use technology to apply for postsecondary, technical, or university programs

- Number of library visitors who use technology to apply for postsecondary, technical, or university scholarships online
- Number of library visitors who participate in online courses (related to any subject) using technology at the public library (e.g., WIFI, computer, Internet)
- Number of library visitors who complete online courses using technology at the public library
- Number of library visitors who access books at the public library
- Number of library visitors who saved time by using technology at the public library to participate in informal learning opportunities (e.g., free courses, training sessions, online learning circles)
- Number of library visitors who saved money by using technology at the public library to participate in informal learning opportunities (e.g., free courses, training sessions, online learning circles)
- Number of library visitors who obtain postsecondary admission after using technology at the public library to apply
- Number of library visitors who obtain postsecondary scholarships after using technology at the public library to apply
- Number of individuals who identify the public library as a place where they can go to learn about the subjects that interest them (i.e., a place of lifelong learning)

### **Communication**

22. Number of library visitors who email with family and friends using technology at the public library (e.g., WIFI, computer, Internet, Facebook, email)
23. Number of library visitors who communicate with family and friends through Skype, instant messaging, Facebook or other online tools (excluding email) using technology at the public library (e.g., WIFI, computer, Internet)
24. Number of library visitors who communicate more with family and friends as a result of technology at the public library (e.g., WIFI, computer, Internet)

Optional:

- Number of library visitors who communicate with a family member or friend living far away or abroad using technology (e.g., WIFI, computer, Internet) at the public library
- Number of library visitors who feel more connected to family and friends because they communicate with family and friends using technology (e.g., WIFI, computer, Internet) at the public library

### **Economic Development**

25. Number of library visitors who use technology at the public library (e.g., WIFI, computer, Internet, Skype, Facebook) for business communications
26. Number of library visitors who search for agricultural information (e.g., farming equipment or techniques, crop prices, weather information) using technology at the public library (e.g., WIFI, computer, Internet, Facebook)

27. Number of library visitors who buy a product or service using technology at the public library (e.g., WIFI, computer, Internet)
28. Number of library visitors who sell a product or service using technology at the public library (e.g., WIFI, computer, Internet)
29. Number of library visitors who use services at the public library (e.g., WIFI, computer, Internet, training or assistance from library staff or outside experts) to write a resume or CV
30. Number of library visitors who use services at the public library (e.g., WIFI, computer, Internet, training or assistance from library staff or outside experts) to find job listings or employment opportunities
31. Number of library visitors who use services at the public library (e.g., WIFI, computer, Internet, training or assistance from library staff or outside experts) to apply for a job
32. Number of library visitors who receive a job offer after using public library services (e.g., WIFI, computer, Internet, training or assistance from library staff or outside experts) to apply for a job

Optional:

- Number of library visitors who use technology (e.g., WIFI, computer, Internet, Facebook) at the public library to identify potential customers
- Number of library visitors who use technology (e.g., WIFI, computer, Internet, Facebook) at the public library to promote their services/products
- Number of library visitors who report that they have identified potential business partners or employees using technology (e.g., WIFI, computer, Internet, Facebook) at the public library
- Number of library visitors who were able to create a website (or have one created by outside experts) for their business as a result of technology (e.g., WIFI, computer, Internet) at the public library
- Number of library visitors who use agricultural information (e.g., farming equipment or techniques, crop prices, weather information) that they found using technology (e.g., WIFI, computer, Internet, Facebook) at the public library
- Number of library visitors who share agricultural information (e.g., farming equipment or techniques, crop prices, weather information) that they found using technology (e.g., WIFI, computer, Internet, Facebook) at the public library
- Number of library visitors who search for agricultural products (e.g., farming equipment, seeds) using technology (e.g., WIFI, computer, Internet) at the public library
- Number of library visitors who use agricultural products (e.g., farming equipment, seeds) that they found using technology (e.g., WIFI, Internet, computer) at the public library
- Number of library visitors who search for information required to buy or sell products or services (e.g., information to find a market for products, competitive pricing information, product improvement information, goods or products that they want to buy) using technology at the public library (e.g., WIFI, computer, Internet, Facebook)
- Number of library visitors who use technology (e.g., WIFI, computer, Internet) at the public library to access online banking services (e.g., checking, savings, payment or loan services)

- Number of library visitors who use technology (e.g., WIFI, computer, Internet) to search for resources related to writing a resume or CV
- Number of library visitors who seek job listings or employment information for others using services at the public library (e.g., WIFI, computer, Internet, training or assistance from library staff or outside experts)
- Number of library visitors who save time by using technology (e.g., WIFI, computer, Internet, Skype) at the public library for business communications
- Number of library visitors whose business grows (e.g., number of customers, employees, and/or revenue has increased) as a result of resources and information they access using services provided at the public library (e.g., WIFI, computer, Internet, training or assistance from library staff or outside experts)
- Number of library visitors whose business profit has grown as a result of resources and information they access using services provided at the public library (e.g., WIFI, computer, Internet, training or assistance from library staff or outside experts)
- Number of library visitors who increase their agricultural productivity/yield as a result of the agricultural information they found using services provided at the public library (e.g., WIFI, computer, Internet, training or assistance from library staff or outside experts)
- Number of library visitors who increase their agricultural income as a result of public library services (e.g., WIFI, computer, Internet, training or assistance provided by library staff or outside experts)
- Number of library visitors who save money by using technology (e.g., WIFI, computer, Internet) at the public library to buy products or services

## Health

33. Number of library visitors who find health information that meets their needs (e.g., related to prevention, treatment, health providers) as a result of public library services (e.g., WIFI, computer, Internet, training or assistance from library staff or outside experts)
34. Number of library visitors who seek health information for others using public library services (e.g., WIFI, computer, Internet, training or assistance from library staff or outside experts)
35. Number of library visitors whose health decisions were informed by the health information they found using public library services (e.g., WIFI, computer, Internet, training or assistance from library staff or outside experts)
36. Number of library visitors whose health improved as a result of the health information they found using public library services (e.g., WIFI, computer, Internet, training or assistance from library staff or outside experts)

### Optional:

- Number of library visitors searching for preventative health-related information online
- Number of library visitors who use health information that they found as a result of public library services (e.g., WIFI, computer, Internet, training or assistance from library staff or outside experts)
- Number of library visitors searching for health treatment information online

- Number of library visitors who report that they have more or better health service provider choices as a result of the information they found using public library services
- Number of library visitors who use technology (e.g., WIFI, computer, Internet) at the public library to access telemedicine services (i.e., online consultation with a health provider)
- Number of library visitors who report that health information they shared as a result of public library services (e.g., WIFI, computer, Internet, training or assistance from library staff or outside experts) informed another person's health decisions
- Number of library visitors who report that they saved money on health services as a result of information they found using public library services
- Number of library visitors who report that they were able to receive otherwise inaccessible treatment using telemedicine services at the public library
- Number of library visitors who report that they saved money using telemedicine services at the public library

### **Government and Governance**

37. Number of library visitors who search for government information (e.g., laws or regulations, descriptions of government programs and services, forms, government jobs) using technology at the public library (e.g., WIFI, computer, Internet, Facebook)
38. Number of library visitors who use a government service (e.g., download/fill out/submit forms, pay taxes, request documents/licenses) through technology at the public library (e.g., WIFI, computer, Internet, Facebook)
39. Number of library visitors who participate in governance processes (e.g., research politicians or citizens' rights, interact with public authorities or elected officials, learn how to volunteer for political events, participate in political movements) using technology at the public library (e.g., WIFI, computer, Internet, Facebook)
40. Number of library visitors who save time by accessing a government service using technology at the public library (e.g., WIFI, computer, Internet)
41. Number of library visitors who receive money/subsidies/support owed to them by the government as a result of their ability to access government services using technology at the public library (e.g., WIFI, computer, Internet)

#### **Optional:**

- Number of library visitors who share government information that they found using technology at the public library (e.g., WIFI, computer, Internet)
- Number of library visitors who save money by accessing a government service using technology at the public library
- Number of library visitors who are satisfied with the government services they access using technology at the public library
- Number of library visitors who found a job by searching for government information using technology at the public library
- Number of library visitors who exercise their citizens' rights as a result of the information they found using technology at the public library



## Required CIMS Demographics Questions

1. What is your sex?
  - Male
  - Female
2. What is your age? (allow numerical answers)
3. Would you say you live in a:
  - Rural area
  - Urban area
  - I don't know
4. What is the highest level of education you completed?
  - None
  - Primary
  - Secondary
  - Technical
  - University
5. What is your employment status?
  - Employed
  - Unemployed
  - Student
  - Prefer not to say
6. Do you have a disability?
  - Yes
  - No
  - Prefer not to say
7. What is your annual income? If you would prefer not to respond to this question, you may leave it blank. (allow numerical answer)
8. In your home, do you have the following technology: (select all that apply)
  - Computer
  - Internet
  - Mobile phone