**Painting the BIG picture: RA and membership**, by Ian McCallum and Sherrey Quinn, Libraries Alive! P/L

**Readers' Advisory Seminar, State Library of NSW 21 March 2023**

## ABSTRACT

This paper is a more detailed version of the presentation delivered to the Readers' Advisory Seminar. It consists of two parts: the first part considers declining library membership and what can be done to reverse the trend, including suggestions from seminar participants, and the second part reports on 20 years of readers' advisory training sponsored by the State Library and delivered by Libraries Alive! The paper's main conclusion is that the techniques involved in successfully conducting a readers' advisory conversation are very similar to the actions required to retain and create library members.

## PART 1. The membership challenge

### Introduction

How do we usually measure the effectiveness of our services?

- Loans

- Visits

- Membership

- Customer satisfaction

The first three measures are quantitative – they count things. Customer satisfaction is qualitative and seeks peoples' opinions. These are usually favourable because the people who use libraries, and even those who don't, value them. There are also outcome measures which attempt to measure changes in behaviour and achievement, such as facility with print and digital literacy, language skills, educational attainment and other 'soft' indicators, but the process of applying these measures is not (yet) well understood. And of course, outcome measures almost always relate to people who are already library members.

For example, a recent project which surveyed 5,500 NSW public library members (Bega Valley, City of Sydney, Northern Beaches, Wagga Wagga) found that:

- The top items that would encourage people to visit their library more include the availability of books and events, flexibility of opening times, awareness of services, and increasing access to library spaces.

- The main reason selected by members to visit their local library (80%) is to browse and borrow collection items. Public libraries are also used as spaces for individual activities.

- More than 70% of library members visited their library – either in person or online – in the last 6 months. Most members visit their library at least once or twice per month.[1]

An earlier survey to determine the state of readers advisory (RA) services in NSW public libraries produced some mixed results.[2] When asked  if the importance of RA has increased in the last three years 79% of respondents answered 'Yes'. And when asked if RA services will be more important in three years from now, 86% of respondents answered 'Yes'. However, when asked 'Does your library specifically

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[1] https://www.sl.nsw.gov.au/public-library-services/advice-and-best-practice/research-projects/using-behavioural-insights

[2] https://www.sl.nsw.gov.au/public-library-services/readers-advisory-services-nsw-public-libraries

market the library as a place to discover books and obtain reading suggestions?', only 54% of respondents answered 'Yes'. Clearly there is a disjunct between thought and action.

Useful as these findings are for confirming what we already knew, they are based on library staff and library members, and while this information will no doubt help to structure services to *retain existing members*, how does it help to *recruit new members*?

How urgent is the need to address membership, the community take-up rate for public library services? It's urgent alright, because we've let it slip for 30 years, and if we don't address it now, our funders will soon be asking awkward questions. Like: 'Where has the money gone?'

In this paper we argue that it's the quality of the personal relationship with the customer that is the way back from the brink of the membership cliff, and that focusing on RA activities is the key to developing this relationship.

### The evidence base: what's been happening with membership?

**Table 1. Library materials^ borrowed (NSW Pubic library stats 2020–21)**

| Year | Loans | Pop. | Loans/cap | Mship % NSW | Mship % Aust |
|------|-------|------|-----------|-------------|--------------|
| 1990 | 38,895,305 | 5,862,497* | 6.6 | | |
| 1994–95 | 43,278,398 | 6,143,971* | 7.0 | | |
| 1999–00 | 43,432,152 | 6,485,081* | 6.7 | 50 | 50 |
| 2004–05 | 46,335,942 | 6,718,023* | 6.9 | 48 | 49 |
| 2009–10 | 50,585,814 | 7,189,304 | 7.0 | 46 | 45 |
| 2014–15 | 43,676,357 | 7,515,285 | 5.8 | 40 | 35 |
| 2019–20 | 34,772,940 | 8,086,952 | 4.3 | 41 | 36 |
| 2020–21 | 35,130,750 | 8,164,742 | 4.3 | 37 | 35 |

*Source: ABS 3101.0 National, state and territory population (Table 4, 310104)
^ Materials includes books, eResources, CDs, magazines, videos, DVDs, large print and audio books, toys, etc.

Summary:

- NSW loans per capita down 35% over 30 years
- NSW membership down 26% over 20 years
- National membership down 30% over 20 years

And now the national picture:

**Table 2. Membership % State & Territory, 1999–2000 to 2020–21**

| Year | ACT | NSW | NT | QLD | SA | TAS | VIC | WA | Aust |
|------|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| 1999–2000 | 45 | 50 | No data | 45 | 61 | 32 | 51 | 58 | 50 |
| 2004–05 | 48 | 48 | 40 | 48 | 60 | 38 | 51 | 50 | 49 |
| 2010–11 | 57 | 46 | 30 | 43 | 50 | 26 | 46 | 45 | 45 |
| 2014–15 | 61 | 40 | 22 | 44 | 36 | 24 | 19 | 37 | 35 |
| 2015–16 | 64 | 40 | 27 | 42 | 35 | 23 | 35 | 42 | 39 |
| 2017–18 | 66 | 41 | 26 | 40 | 32 | 22 | 34 | 33 | 36 |
| 2020–21 | 43 | 37 | 34 | 39 | 28 | 20 | 32 | 38 | 35 |

Source: NSLA. [Archived Australian public library statistics | National and State Libraries Australasia (nsla.org.au)](#)

**Figure 1. Membership % State & Territory, 1999–2000 to 2020–21**
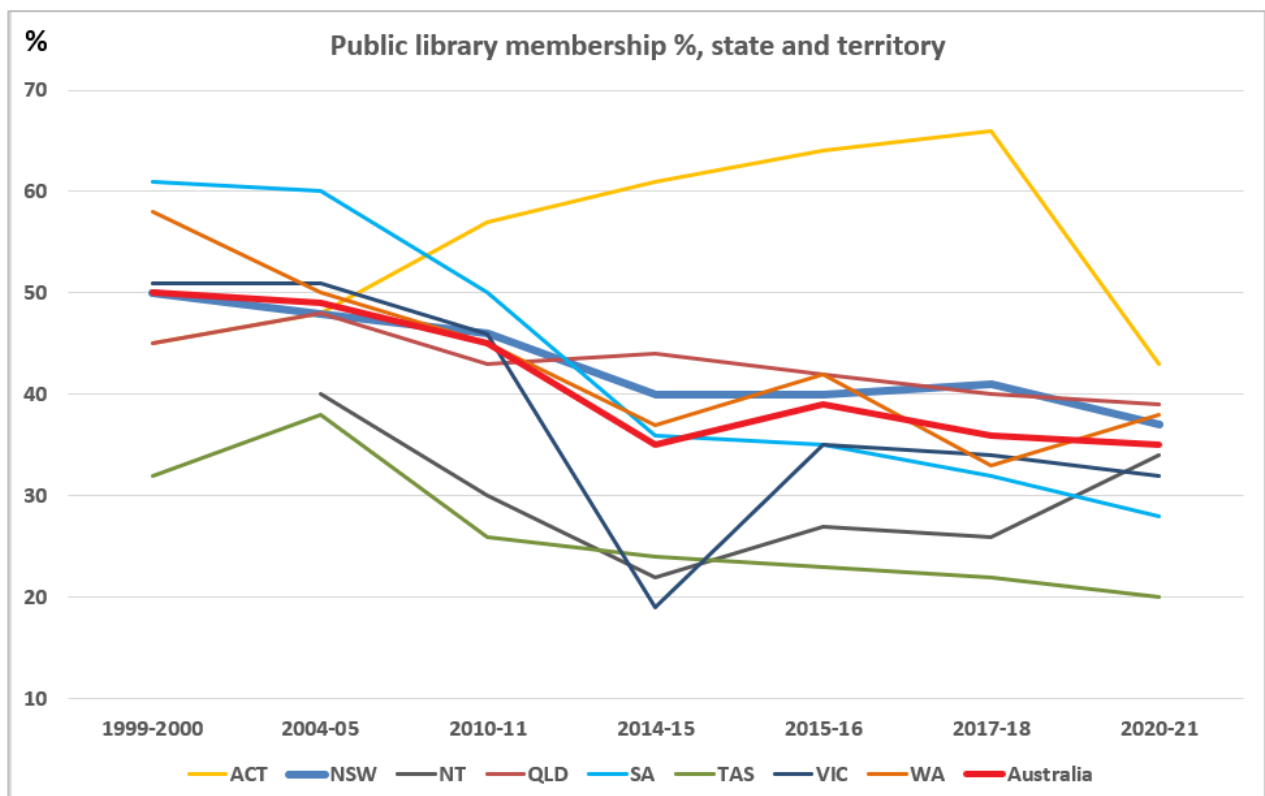
And the detailed picture for NSW:

**Table 3. NSW public library membership statistics, June 2021 (ABS Population data June 2020)**

| Library service | Members % of pop | Library service | Members % of pop |
|---|---|---|---|
| Albury | 40.6 | Leeton | 23.7 |
| Armidale | 36.1 | Lithgow | 29.5 |
| Balranald | 29.4 | Liverpool | 22.6 |
| Bathurst | 26.1 | Macquarie | 50.2 |
| Bayside | 20.2 | Maitland | 42.9 |
| Bega Valley | 25.1 | MidCoast | 25.6 |
| Berrigan | 37.9 | Mid-Western | 48.8 |
| Big Sky | 5.8 | Mosman | 45.8 |
| Blacktown | 29.9 | Murray River | 10.5 |
| Blue Mountains | 38.3 | Nambucca Valley | 47.3 |
| Bourke | 28.8 | Newcastle | 50.4 |
| Broken Hill | 39.1 | North Sydney | 37.4 |
| Burwood | 51.6 | North Western | 14.2 |
| Camden | 64.6 | Northern Beaches | 72.2 |
| Campbelltown | 41.6 | Oberon | 35.2 |
| Canada Bay | 44.3 | Parkes | 37.9 |
| Canterbury Bankstown | 23.4 | Parramatta | 28.8 |
| Central Coast | 17.1 | Penrith | 20.7 |
| Central Murray | 24.3 | Port Macquarie Hastings | 37.8 |
| Central Northern | 72.1 | Queanbeyan-Palerang | 23.2 |
| Central West | 46.2 | Randwick | 29.4 |
| Cessnock | 22.9 | Richmond-Tweed | 42.9 |
| Clarence | 47.1 | Richmond-Upper Clarence | 50.6 |
| Cobar | 50.7 | Riverina | 26 |
| Coffs Harbour | 48.7 | Ryde | 54.5 |
| Cumberland | 23.1 | Shellharbour | 30.6 |
| Eurobodalla | 50.7 | Shoalhaven | 31.3 |
| Fairfield | 63.2 | Singleton | 34.6 |
| Georges River | 37.5 | Snowy Monaro | 27.4 |
| Glen Innes Severn | 44 | Strathfield | 47.1 |
| Goulburn Mulwaree | 48.1 | Sutherland | 30.1 |
| Grenfell | 20.4 | Sydney | 33.7 |
| Gunnedah | 54.6 | Tenterfield | 34.4 |
| Hawkesbury | 37.6 | Upper Hunter-Muswellbrook | 57.9 |
| Hills | 46.4 | Upper Hunter Shire | 34.7 |
| Hilltops | 29.4 | Upper Lachlan | 30.3 |
| Hornsby | 42.3 | Waverley | 29.6 |
| Inner West | 51.5 | Wentworth | 32.6 |
| Inverell | 44.5 | Western Riverina | 43.8 |
| Kempsey | 34.5 | Willoughby | 60.7 |
| Kiama | 50.5 | Wingecarribee | 60 |
| Ku-Ring-Gai | 27.8 | Wollondilly | 13.2 |
| Lachlan | 52.9 | Wollongong | 17.1 |
| Lake Macquarie | 23.8 | Woollahra | 53.8 |
| Lane Cove | 45.4 | Yass Valley | 38.8 |
| | | **Total: 90** | **Average: 37.7** |

**What are the conventional responses to declining membership?**

- Increase expenditure on library materials
- Build or refurbish physical facilities
- Promote collection and services/programs
- Fine tune: extend opening hours, offer more programs, abolish fines, increase the number of items that can be borrowed, train staff.

However . . . libraries are facing post-COVID resource constraints:

- LGAs are strapped for cash: they're dealing with the aftermath of fires and floods and facing reductions in rate revenue; IT is costing them more; state government grants are hotly contested

Which leads us to . . . What can be done within existing resources?

- Engage new customers through current customers through building quality relationships through RA

Some libraries must already be doing this:

**Table 4. Top five NSW public library membership statistics**

| Library | Mship % | $/cap | Sal$/cap | Mat$/cap | Mat/cap | Loans/cap | AF% |
|---------|---------|-------|----------|----------|---------|-----------|-----|
| Northern Beaches | 72.2 | 50.81 | 26.94 | 5.68 | 1.22 | 5.08 | 23.06 |
| Camden | 64.6 | 41.69 | 18.10 | 2.71 | 0.95 | 1.89 | 22.61 |
| Fairfield | 63.2 | 40.05 | 22.46 | 3.36 | 0.86 | 1.30 | 14.39 |
| Willoughby | 60.7 | 78.97 | 33.96 | 4.72 | 2.96 | 7.5 | 28.27 |
| Wingecarribee | 60 | 40.63 | 21.04 | 3.60 | 1.49 | 3.88 | 35.09 |
| **NSW average** | **37.7** | **51.24** | **29.93** | **4.95** | **2.32** | **4.41** | **34.57** |

Source: NSW Public library stats 2020/21

**What are these five library services doing that makes them stand out?**

*Spending more overall?* Not really (except for Willoughby).

*Spending more on staff?* Not really.

*Spending more on materials?* Not really.

*Have more materials per capita?* Not really.

*Have higher loans per capita?* Mmm. Varies, but except for Willoughby, not really.

*Have a higher proportion of adult fiction ('core business')?* Not really.

What are they doing then that gives them such comparatively high membership numbers?

Obviously their communities know about them – they are effective in promoting their services. But we think there's more. We think (suspect) the key factor just might be the quality of the relationships they have with their customers.

**Conversations with library managers**

We telephoned the library managers of these five libraries and asked them:

Why are your membership stats so high? What are you doing right?

They shared the following observations:

1. There's no one thing, but community educational background is an important factor

2. We focus on customers/customer experience and pro-active customer service

3. We have a supportive Council and supportive Council officers

4. Our (passionate) staff understand community characteristics and are involved with the community on multiple fronts

5. Our community values books and reading (LOTE and literacy)

6. We invest in staff training/team meetings/performance improvement

7. We are conveniently located where people usually visit; we have good transport links

8. We begin early, often with programs for the new-born

9. We work hard to be relevant for new residents – we join them up as they move in and follow-up with programs for all ages.

Next, we tried to align the experience of the library managers with our two decades of experience in running courses for readers' advisors (See Part 2 below). We started with a summation of the 'golden rules'.
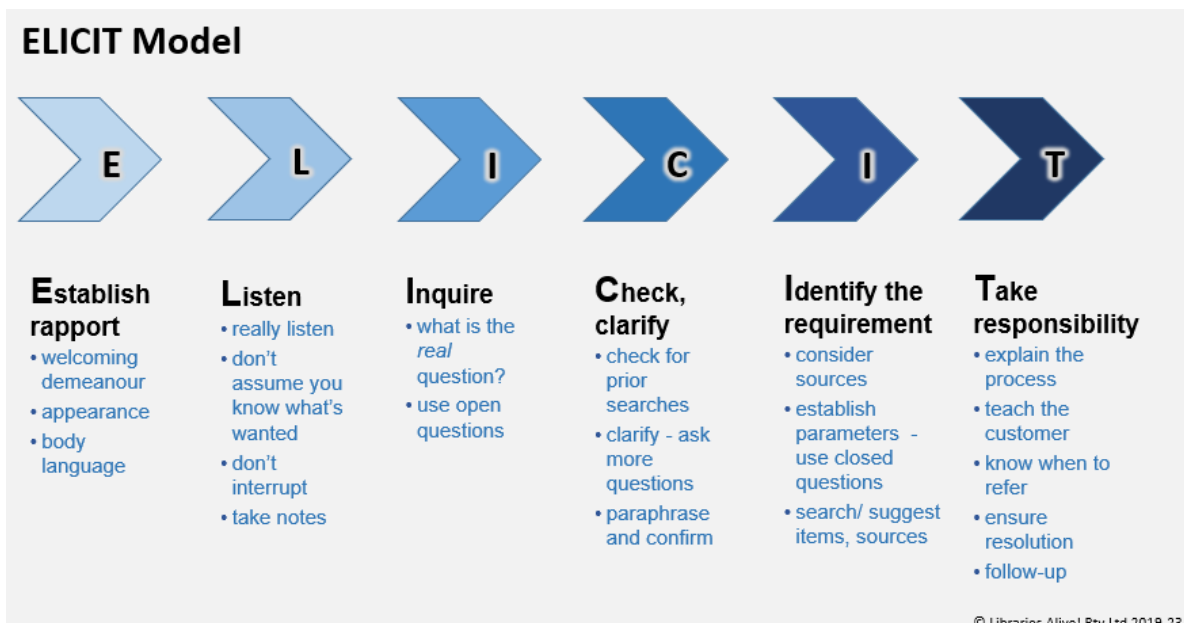
**What are the proven effective characteristics of the successful RA interaction? How should a readers' adviser behave?**

1. **It's about the *reader* - it's not about *you.***
   Put yourself in the readers' shoes, try to understand what *they* might like, what might appeal to *them*

2. **Attitude and atmosphere are everything.**
   Be approachable; overcome the perception that the library is only a self-help store

3. **Don't make assumptions or judgements.**
   Use your skills to find out what the readers *really* want and never rely on assumptions

4. **Know your collection.**
   Authors, genres (genres can have numerous sub-genres: familiarise yourself with them), Dewey DC and shelf arrangement

5. **Read, read, read.**
   Pay attention to style, appeal factors, books that might be similar; read outside your comfort zone; skim books to learn more about them

6. **Keep a reading diary.**
   When you read, think about connections: what sort of reader might like this book? What other books does it remind you of?

7. **Be prepared; use your skills and tools**.
   Remember your reference interviewing techniques; use your reference sources; know your collection

8. **There is no perfect answer.**
   Offer a number of suggestions

9. **Invite feedback.**
   Ask the customer to tell you how they liked the books you suggested; you can learn from this and make better suggestions next time

10. **Stay up-to-date.**
    Read widely about RA and publishing – keep ahead of your readers

11. **Share with colleagues and readers.**
    Learn what you can from reading, practice, your colleagues and your customers, and pass it on to others.

12. **Enjoy yourself.**


It seemed to us that many elements of the library managers' customer-centred approach echoed many elements of the reader-centred approach of our RA work. In fact we have devised a model, called the ELICIT model (Figure 1), to provide explicit structure to the RA conversation and the six steps could apply equally in any library customer engagement process.

**Figure 2. ELICIT Model**



**ELICIT Model**

**E**stablish rapport
- welcoming demeanour
- appearance
- body language

**L**isten
- really listen
- don't assume you know what's wanted
- don't interrupt
- take notes

**I**nquire
- what is the *real* question?
- use open questions

**C**heck, clarify
- check for prior searches
- clarify - ask more questions
- paraphrase and confirm

**I**dentify the requirement
- consider sources
- establish parameters - use closed questions
- search/ suggest items, sources

**T**ake responsibility
- explain the process
- teach the customer
- know when to refer
- ensure resolution
- follow-up

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**What can we do about it, right now?**

Given the opportunity that presented itself (60+ seminar participants in the room), we asked them:

> **What is our single most important membership message for retaining existing members and creating new members?**

Some people confused *the* message for members and non-members with what needs to be done, for example, 'Having friendly, knowledgeable & well-trained professional staff that are enthusiastic about helping customers with their needs and welcoming new ones', but amongst these contributions is the basis of a marketing and promotion campaign with local, state and national impact. All it requires is the will to tackle membership head-on.

Here are the suggestions from seminar attendees:

@ your library: home of real information – find what you are looking for

Be all you can be, read

Be part of your community . . . Join your library

Books end. Stories continue

Books, movies & more – all for free

Come and enjoy our free items

Come on an adventure with your library

Community – connecting people with new ideas & resources

Connect, live & learn for free

Connect to the world through your library

Connect with your community at the library

Connection with community at your local library

Expand your world . . . Read

Explore new worlds

Fight evil, read books

Find your community, find your library

For all!

Free for all @ your library

Free yourself at your library

Go beyond with your library

Ignite, inspire, learn – libraries for lifelong learning

It's for you . . . and it's free!

It's free

It's free

Know the facts – at your library

Libraries – a passport to the world

Libraries are a key, vibrant, free community facility available for all members of the community – offering a variety of services

Libraries are for everyone

Libraries are for everyone

Libraries are for everyone!

Libraries are for everyone at any time

Libraries are for life, everyone is welcome

Libraries are free

Libraries are free!

Libraries are *__free__* – come and join us

Libraries are full of free things

Libraries are here for you

Libraries are here to help you

Libraries are more than collections

Libraries are more than just books

Libraries are on your side, whoever you are

Libraries are the doorway to your local, regional, national, international (and out of this world) community

Libraries are with you every step of your life

Libraries change lives

Libraries – Free to use

Libraries from birth

Libraries liven life

Libraries look after your mental health

Libraries make life easy

Libraries – more than books

Libraries offer more than you think they do

Libraries support and uplift their community

Libraries support lifelong learning, supporting community on their journey

Libraries – supporting you

Libraries value and welcome everyone!

Libraries welcome everyone

Library as space

Live a better life with your library

Live – Learn @ your library

Live your best life with your library

Love your local library

Majority of services are free and so much variety

Open your mind with imagination

Our library is *inclusive* and welcomes everyone

Read

Read your way, at your library

Reading rewards you

See yourself at your library

Supporting informational needs

Talk to the experts. Start a conversation

The library opens you up to the world

To support the community, all walks at all stages

Try instead of buy (sustainability and economic saving)

Wake up! Your library is open.

Welcome to your library – let your adventure begin . . .

What can your library do for you today?

When in doubt – go to the library

The world comes to you at your library

You always have libraries – libraries for life

You can expand your mind and your social network through your library

You matter, you belong, free information for all at your library!

Your Council wants to give you somethings for free. I can surprise you today!

Your library belongs to you – use it!

Your library is here to help, to inform, to entertain

Your library is part of your story

Your library welcomes you

Your library: your home away from home

Your library, your life

This list is reproduced here, just as it was received from the seminar participants. It represents their views on how to gain the attention of and connect with existing and new library members. If, and hopefully when membership is tackled as a broad state or national issue, at least some of these messages will be useful in any campaign.

## PART 2. Report on 20 years of the *Rewarding Reading* training course

### Introduction

This paper was originally intended to address specific RA issues and to report on training courses held to date. However, when we started to consider the effectiveness of RA training, and how to measure effectiveness, we quickly landed on the membership metric. RA in the context of membership was covered in Part 1. Now in Part 2 we return to our original intent – to describe the training conducted over the past 20 years, and in Part 2, especially figures 6 and 7, we realised that we needed to address the 'What next?' considerations canvassed in Part 1.

### Rewarding Reading train-the-trainer program

*Rewarding Reading* started in 2004 as a two-day train-the-trainer program for readers' advisers. The workshops are funded in NSW by the State Library of NSW (SLNSW) and participants are expected to pass on the training to their colleagues. Subsequently one-day training courses and half-day refresher sessions were also offered. Since 2004 *Rewarding Reading* workshops have been delivered in all states/territories of Australia (except Tasmania and Northern Territory), and in New Zealand. During the COVID pandemic, the one-day training session switched to delivery by video-conference presented in two half-day sessions.

The principles of the *Rewarding Reading* program are that it:

- is reader-centred

- positions readers advisory work as a core service of the public library

- aims to develop staff skills and confidence

- is competency-based, covering theory and operational matters

- uses and builds on the knowledge and experience of participants (i.e., the potential trainers)

- encourages staff knowledge and exploitation of the entire library collection (fiction, non-fiction, all genres, all formats)

- maximises opportunities for ongoing skills transfer to trainee's colleagues when the train-the-trainer model is employed

- has a modular format, flexible enough for delivery for special purposes, for example shorter versions for special groups, for refresher sessions, and so on.

The program uses an experiential learning model, in which participants are encouraged to acknowledge and share what they know, to learn from each other and to take personal responsibility for learning. There is some teaching by course leaders, a lot of discussion, individual and group activities, and learning by example.  In NSW Skills transfer by the trainees to their colleagues is expected by the SLNSW.

The business model is straightforward:

- State Library funding for course development (2004), after tender process

- original expertise contributed by consultants and library practitioners

- course developers licensed to deliver the program in Australasia

- train-the-trainer model for skills development and ongoing skills transfer to public library staff

- royalties from all courses are returned to the SLNSW.

Figure 3 demonstrates the *Rewarding Reading* workshop content and summarises the reader's advisory conversation and process.

**Figure 3.  Readers' Advisory Framework**
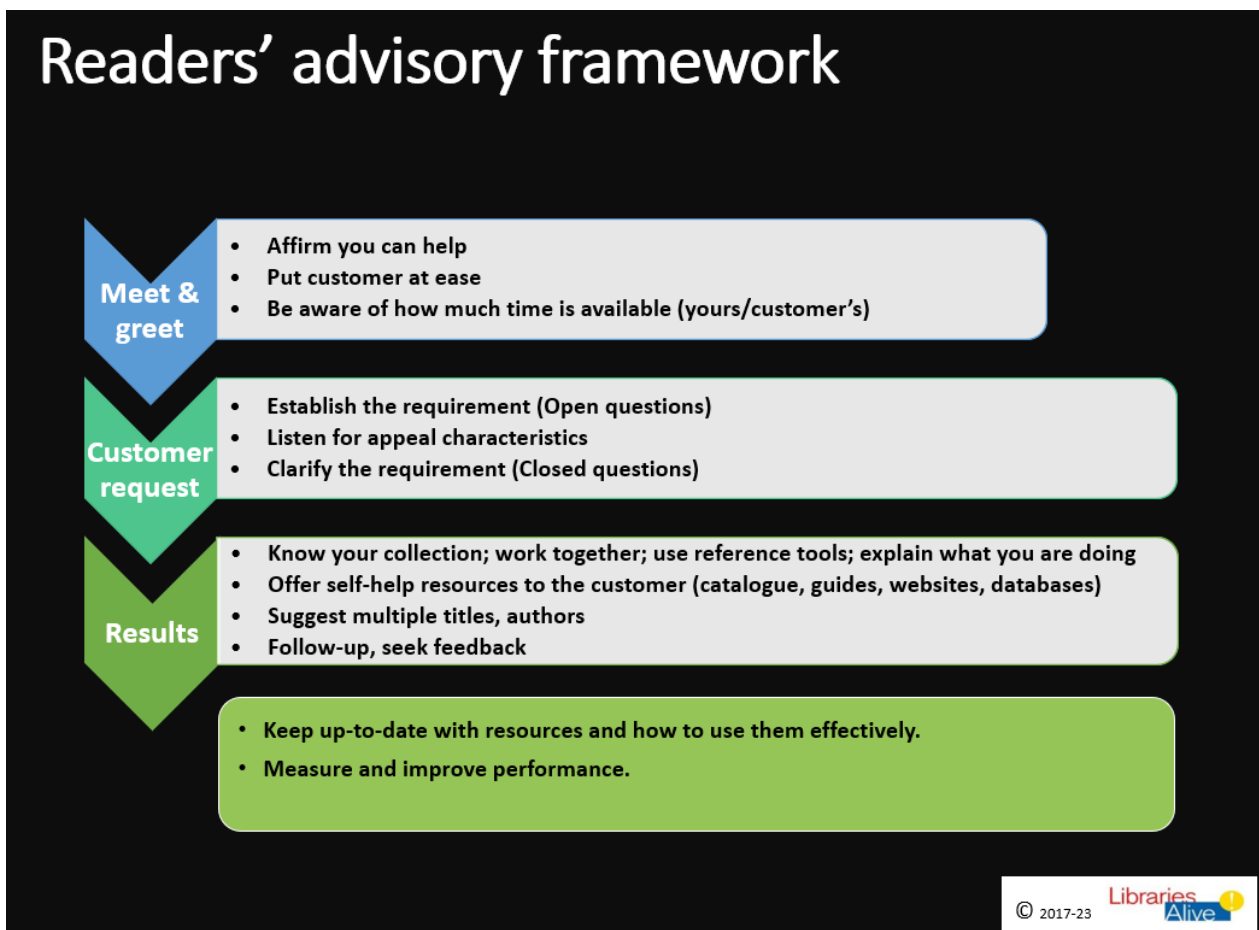


The development of *Rewarding Reading* is discussed in more detail in Conlon, Forsyth and Jamieson (2005) and Quinn (2008). Forsyth and Quinn (2014) present an overview of the history of readers advisory work in Australia, in which they suggest there was little formal training in RA work prior to 2004,

and that in the early years of the Internet information services and reference work in Australia were prioritised over readers advisory services for recreational reading.

**Rewarding Reading training effort**

**Figure 4. Rewarding Reading training workshops (number per year) 2004–21, Australia and New Zealand**
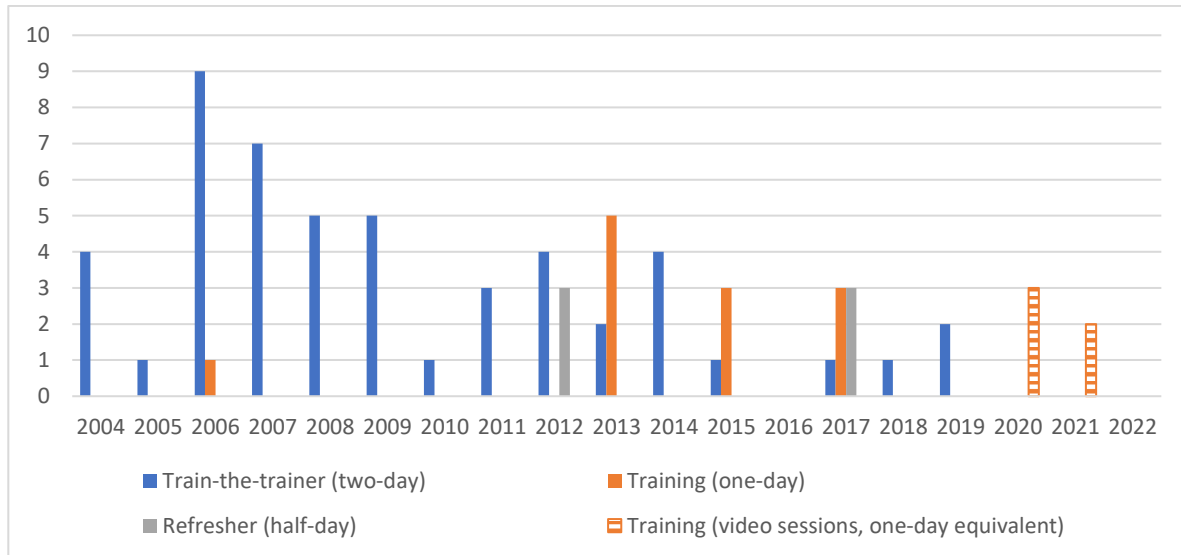


- Includes all *Rewarding Reading* training courses in NSW, other states (ACT, Queensland, South Australia, Victoria, Western Australia) and New Zealand. Does not include any RA training provided by other programs.

- 614 trainers trained (614 participants in *Rewarding Reading* train-the-trainer courses); 236 other *Rewarding Reading* format courses.

**Figure 5. Rewarding Reading workshops (number per year) 2004–21, NSW**
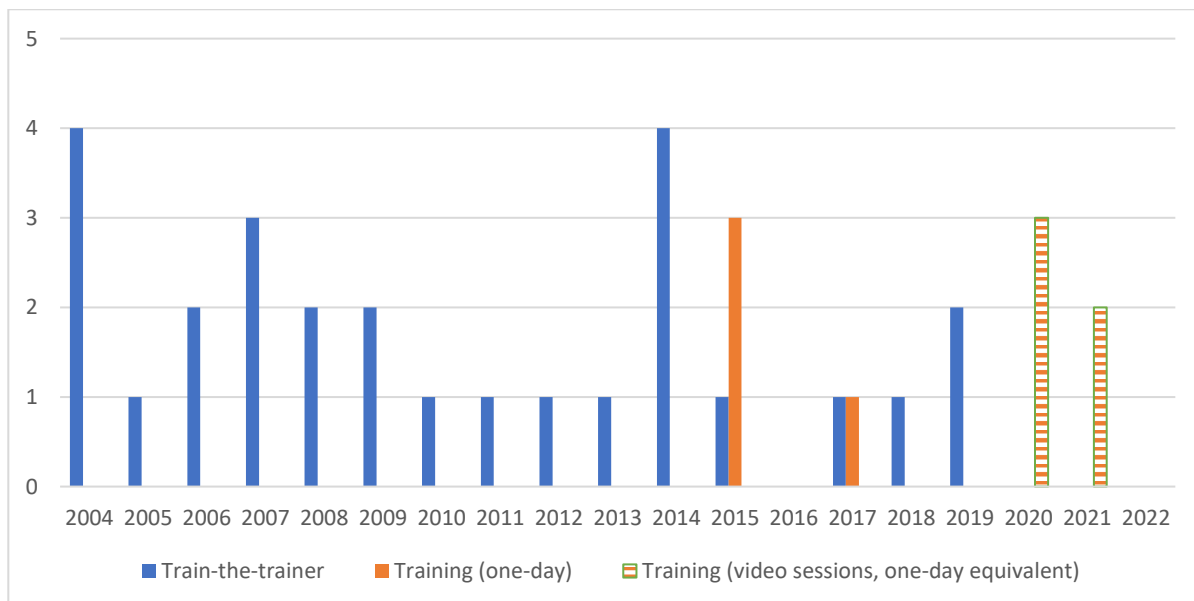


- All NSW courses sponsored by SLNSW

- 27 train-the-trainer courses between 2004 and 2019; 390 trainers trained; multiplier effect varied according to size of library: on-training ranged from 2 to 3 people in small libraries to perhaps a few dozen in larger libraries. Possibly could estimate a multiplier of 8–10 overall for train-the=trainer training, that is, for one person trained another 8 to 10 receive on-training as a result.

- Represents a sustained commitment by SLNSW to RA skills development in NSW public libraries

- Number and nature of workshops now fluctuate according to interest, need and opportunity

- COVID impact – switch to online seminars: one-day training delivered by videoconference in two half-day chunks to suit online medium and library staff rostering purposes.


**Impact of *Rewarding Reading* training**

The impact of training was assessed after four years (Quinn 2008), with case studies outlining outcomes in particular libraries after training. After ten years, SLNSW conducted a survey with the aim of determining the current state of readers' advisory services in NSW public libraries. This NSW research showed (page 1) that:

- Readers advisory services are provided in many libraries

- While most of the training has been effective, there are issues in some local implementation of the training

- Some organisations still have restrictions on the use of social media, including requiring everything to have preapproval.

- Almost 40% of the responses showed the provision of some roving as part of readers' advisory services

- Some libraries are making their catalogue work very effectively as part of the readers' advisory service.

The survey report went on to say that

> Just over half the respondents said their libraries were marketed as places to discover books and obtain reading suggestions, amongst many other services provided by libraries

and that

> The *Rewarding reading* training played a significant role as did on site staff training, which may have been derived from the Rewarding reading training. Almost half the respondents included self-directed training, whilst almost 14% said they had no readers' advisory training or support provided by their library.[3]

From discussion with colleagues, trainees, library managers and SLNSW information we have found that the impact of training varies from library to library but overall there has been increased awareness of RA as a core library service. Ways in which libraries have responded to this are demonstrated by:

- on-training conducted in libraries (sometimes to all staff, sometimes to select groups), and ongoing library training initiatives

- staff encouraged to read and discuss books and reading among themselves and with customers

- understanding the RA conversation as a form of reference work

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[3] SLNSW 2016, Readers Advisory Services in NSW public libraries, p. 3: https://www.sl.nsw.gov.au/public-library-services/readers-advisory-services-nsw-public-libraries)

- ongoing focus on making collections accessible and appealing to customers by, for example:
    - displays of various types and subjects
    - staff recommendations; reader recommendations
    - reading lists and read-alike-lists
    - genre guides and bookmarks
    - events and programs which highlight and use the library's resources and spaces
    - reference resources on RA (for staff and self-help resources for customers) – print, web, e-resources, blogs
- exploitation of the features of library management software as a readers' advisory resource
- readership- and membership-focused programs
- outreach to community
- library promotion
- activities of the Readers' Advisory Working Group, and this **SLNSW** seminar series.

Of course such activities went on prior to the readers advisory training, but training generated enthusiasm, confidence in skills and learning, and ideas for new initiatives.

**Loans and membership**

Has focus on RA been reflected in increased loans or membership?

Apparently not, although RA work may have been a factor in slowing the decline of each.

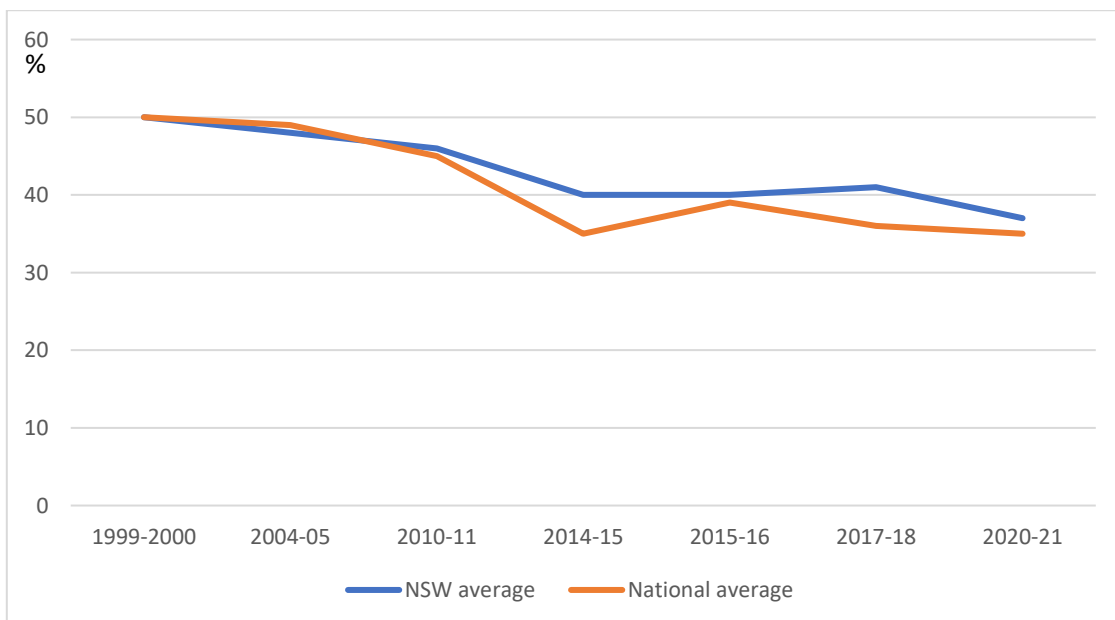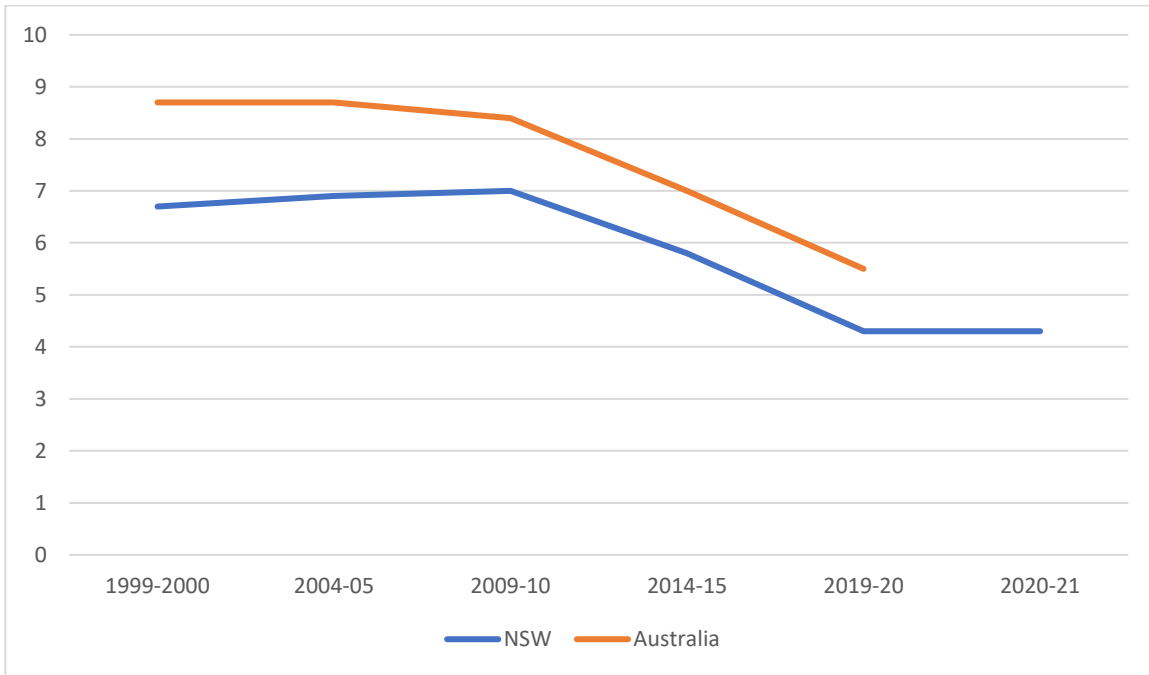**Figure 6. Library membership as per cent of population, NSW and Australia**

**Figure 7. Public library loans per capita or population, NSW and Australia**



Source: Australian data from: https://www.nsla.org.au/index.php/resources/archived-australian-public-library-statistics ;   NSW data from NSW Public Library statistics

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