Engagement Audit Checklist

Engagement is a form of commitment. Engaging your users is in turn committing to them; and having them engage you back is their commitment to you. Building the overall Library Experience (LX) that you offer users based on mutual engagement strengthens your relationship with your users and your community.

Every experience is made up of a series of micro-moments. Library Experience (LX) is the sum of all the interactions a community member has with the library over the life of the relationship to create how the community member perceives the library. Each micro-moment is an opportunity – an opportunity to discover, to interact, to connect, to relate.

Engagement isn't one experience, micro-moment or activity, it's everything the library does over time to build a relationship with individual community members.

Part I — Create Your Library Experience Vision

Using your library's vision and mission statement as a guide, set some goals for your library experience improvement plan and for the specific areas that you're trying to improve.

A recent survey of public library directors and marketers identified these areas as being the most common marketing goals across the group:

1. Improve community awareness of programs and services
2. Increase use of resources and collections
3. Increase library visits
4. Increase program attendance
5. Sign-up new cardholders

Yet survey respondents felt they were least effective in increasing library visits, new cardholders, and use of resources and collections. These are some potential areas to start with for outlining improvements.

Library Experience (LX) Statement
In a single sentence, what Library Experience do you want to offer your community?

Key User Groups You Engage With Regularly
Identify the key user groups that you serve

1. Patrons
2. Staff
3. Donors
4. Community Members (non-patrons)
5.
6.

The Physical and Virtual Libraries
When considering the Library Experience (LX) that you want for your users, keep in mind that our libraries exist both physically within our buildings and virtually on the internet. Both the physical and the virtual libraries provide their own unique experiences and challenges. We need to be aware of both, and work to create similar extraordinary experiences between the two.

Challenges To Focus On
Identify specific areas and activities within the library that do not meet the level of Library Experience you wish to be known for as identified by your LX Statement above.

1.

2.

3.

4.

Library Experience Worksheet

Template:

Current Experience	1. Desired Level of Service	2. Identify & Remove Barriers	3. Staff Empowerment	4. Policies to Changes
Challenge: <Specific Challenge>				
Users: <Affected Users>				
Physical Library Virtual Library Both				
	Desired Engagement Experience	**Barrier #1:** **Removal Plan:** **Barrier #2:** **Removal Plan:** **Barrier #3:** **Removal Plan:**	**Staff Empowerment Plan**	**Policy #1:** **Policy #2:** **Policy #3:**

Identify as many barriers/removal plans and policies as necessary to affect change.

Example:

Current Experience	1. Desired Level of Service	2. Identify & Remove Barriers	3. Staff Empowerment	4. Policies to Changes
Challenge: **Pick your own due date**				
Users: Patrons & Staff				
Physical Library Virtual Library (Both)				
In an era of automatic renewals and no fines for overdue material, system mandated due dates seem arbitrary and a form of saying "no" to patrons.	Allow patrons the option of picking their own due date: - Default due dates will automatically apply unless asked - Patrons must engage a staff member directly or via online chat to request a new due date - Standard due dates apply if any holds currently exist for the title - Item will be recalled after a minimum use period equal to the standard loan period if a hold by another patron is later placed - New Books, DVDs, Video Games and Browse collections are exempt from this policy	**Barrier #1:** Library Board approval **Removal Plan:** Draft new policy, submit to Board for approval **Barrier #2:** Due date override is password protected **Removal Plan:** Update staff permissions giving all staff override authority **Barrier #3:** Loan rules need updating online to ensure minimum use period and recall in event of future hold **Removal Plan:** Update loan rules in the ILS	Review new policy with staff, including reasoning behind it and that a patron must directly ask a staff member in person or via chat for a longer, specific due date. This is intended as an opportunity for staff to engage patrons in a positive manner. The staff member is to explain the parameters of "Pick your own due date" and that a due date may be changed, and the item recalled if another patron requests the item at a later time. The patron will be notified via email if this happens. Manager approval of a Due Date override is no longer required. All staff are given system authorization to change Due Dates.	**Policy #1:** Circulation policy on due dates and item recalls. **Policy #2:** Manager approval of Due Date override policy.

Worksheet:

Current Experience	1. Desired Level of Service	2. Identify & Remove Barriers	3. Staff Empowerment	4. Policies to Changes
Challenge:				
Users:				
Physical Library	Virtual Library	Both		
		Barrier #1: **Removal Plan:** **Barrier #2:** **Removal Plan:** **Barrier #3:** **Removal Plan:**		**Policy #1:** **Policy #2:** **Policy #3:**

Part II — Engagement Tools Inventory

This section reviews both your current practices and tools. It helps you assess your current forms of engagement, and highlights areas for improvement and/or new tools that can be used.

Assess current engagement practices. Looking at the list below, place a checkmark by the patron or community engagement activities that your library currently practices. Circle the items that your library excels at. While reviewing these practices, consider the experiences offered to both your physical and your virtual users, and how those experiences may differ. Add to the list as necessary.

Technology

_____ Website

    _____ Personalized website content

_____ Catalog/Discovery layer

_____ Program calendar

_____ E-resource access

    _____ eBooks

    _____ eMagazines

    _____ Streaming movies

    _____ Databases

_____ Other

    _____

Browsing

_____ Browse collections

_____ New title lists

_____ Featured title displays

_____ Patron recommendations

_____ Library App

    _____ iOS/Apple

    _____ Google

_____ Other

    _____

Reference

_____ Reference desk

_____ Greeters/Roaming reference staff

_____ Online reference/chat

_____ Online chat-bot

_____ Digital Assistant integration (e.g. Alexa)

_____ Other

    _____

Self-Service

_____ New patron registration

_____ Self-service holdshelf

_____ Self-service check out

    _____ Kiosk

    _____ Smartphone

_____ Holds management

_____ Fines payment

_____ Book renewal

_____ Patron account renewal

_____ Curb-side Pickup

_____ Pickup Window

_____ Home delivery

_____ Other

    _____

Courtesy Notices

_____ Print

_____ Telephone

_____ Email

_____ Text

_____ Other

    _____

Marketing

_____ Newsletter

    _____ Print

    _____ Email

_____ New patron welcome

_____ Customer Surveys

_____ New title alert

    _____ Personalized alert

_____ Event & Program notifications

    _____ Personalized alert

_____ Social Media

    _____

_____ Closure alerts

    _____ Online

    _____ Email

    _____ Text

_____ Other

    _____

Inventory current engagement tools. Looking at the list below, place a checkmark next to tools currently used by your library to manage patron engagement.

Notifications
____ ILS-generated notifications
____ LX Starter
____ iTiva
____ Patron Point
____ Shoutbomb
____ Twilio
____ Unique
____ Vega Interact
____ Other _____

Digital Marketing
____ BiblioEmail
____ Community Engagement Platform
____ Constant Contact
____ Emma
____ Hubspot
____ LibraryAware
____ Mailchimp
____ Marketo
____ MessageBee
____ OCLC Wise
____ PatronPoint
____ Savannah
____ Vega Promote
____ Wowbrary
____ Other _____

Website Publishing
____ BiblioWeb
____ Create
____ Drupal
____ LibGuides
____ Mugo Web

Website Publishing (cont.)
____ UniqueChat
____ Vega Promote
____ WordPress
____ Zepheira
____ Other _____

Program Management
____ Attend
____ BiblioEvents
____ Community Engagement Platform
____ Vega Program
____ Other _____

Mobile Apps
____ BiblioApps
____ Capira Mobile
____ Engage
____ Innovative Mobile
____ Solus
____ Other _____

Design Tools
____ Adobe Suite
____ Canva
____ Camtasia
____ Other _____

Community Building
____ Facebook
____ Goodreads
____ Hootsuite

Community Building (cont.)

____ Instagram

____ LibraryThing

____ LinkedIn

____ Pinterest

____ SnapChat

____ TikTok

____ Twitter

____ Other _____

Advertising

____ Google Ads

____ Koios

____ Other _____

Reading Recommendations

____ LibraryAware

____ NextReads newsletters

____ Vega Promote

____ Other _____

Operations/Misc

____ Broadcastw

____ Curbside Communicator

____ Digital Assistant integration
     *(Alexa Skill, Google Nest,
      Apple HomePod, other)*

____ LibAnswers

____ LibCal

____ Patron Incident Tracking System PITS

____ Quipu eCARD

____ Quipu ePASS

____ Reserve

____ SurveyMonkey

____ Vega Interact

____ WebEx

____ Zendesk

____ Zoho

____ Zoom

____ Other _____

Combining your Library Experience worksheets and available tools, you can begin (re-)shaping the Library Experience (LX) you offer to your physical and virtual users in both your physical and virtual library. Focus on the micro-moments your users experience, and make each one memorable, personalized, and engaging.

> It takes months to find a customer... seconds to lose one.
> *–Vince Lombardi*