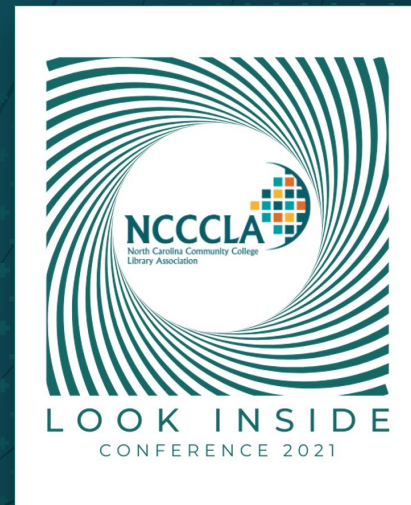


Data-Driven Member Engagement

Presented by: Amelia Rodarte



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Do you currently
feel connected to
your community?

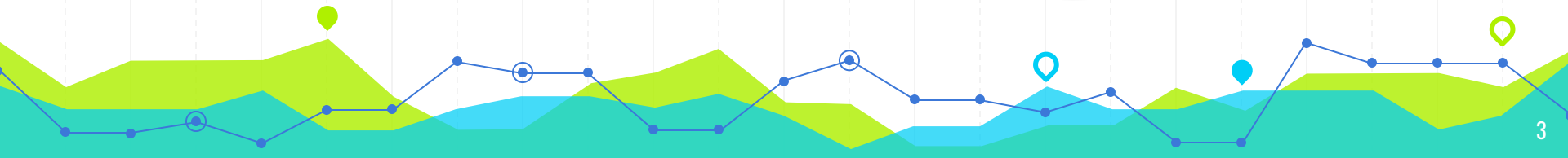
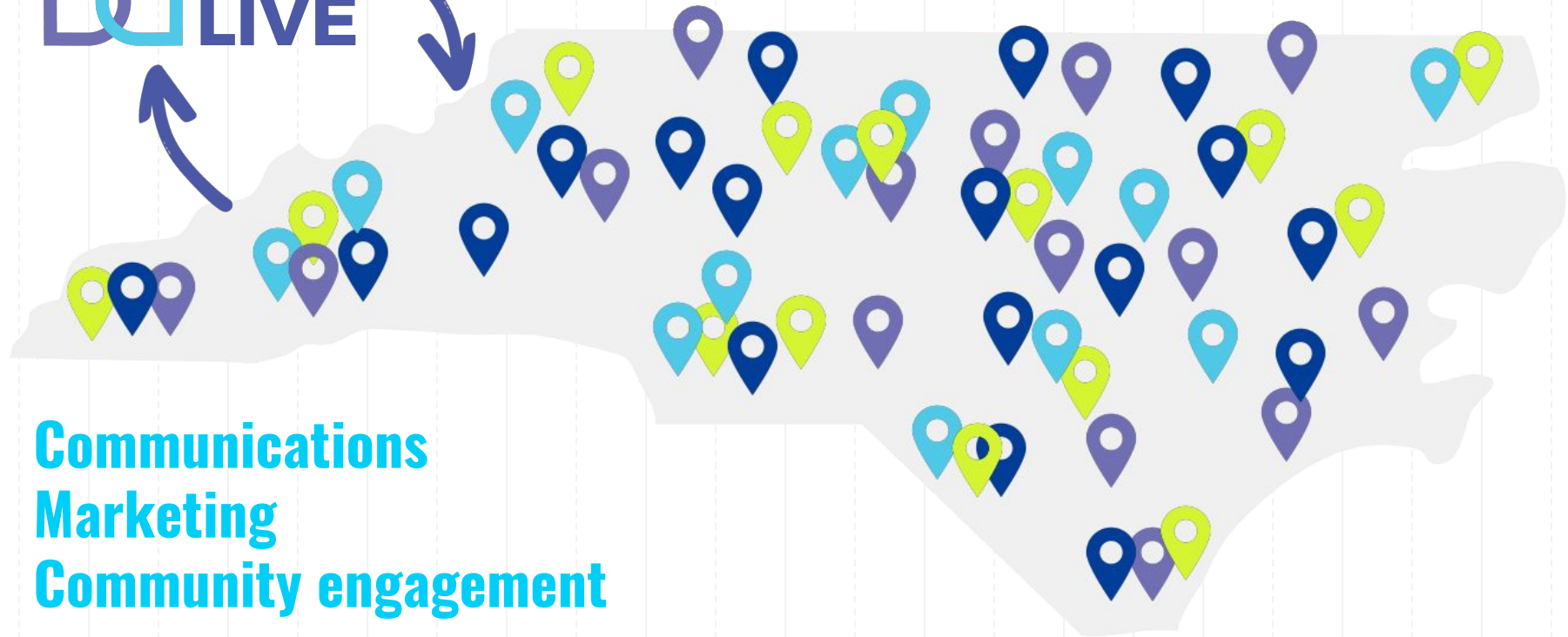
HELLO!

Amelia Rodarte

NC LIVE Community Engagement Librarian

amelia@nclive.org

**DO NC
LIVE**



BACKGROUND

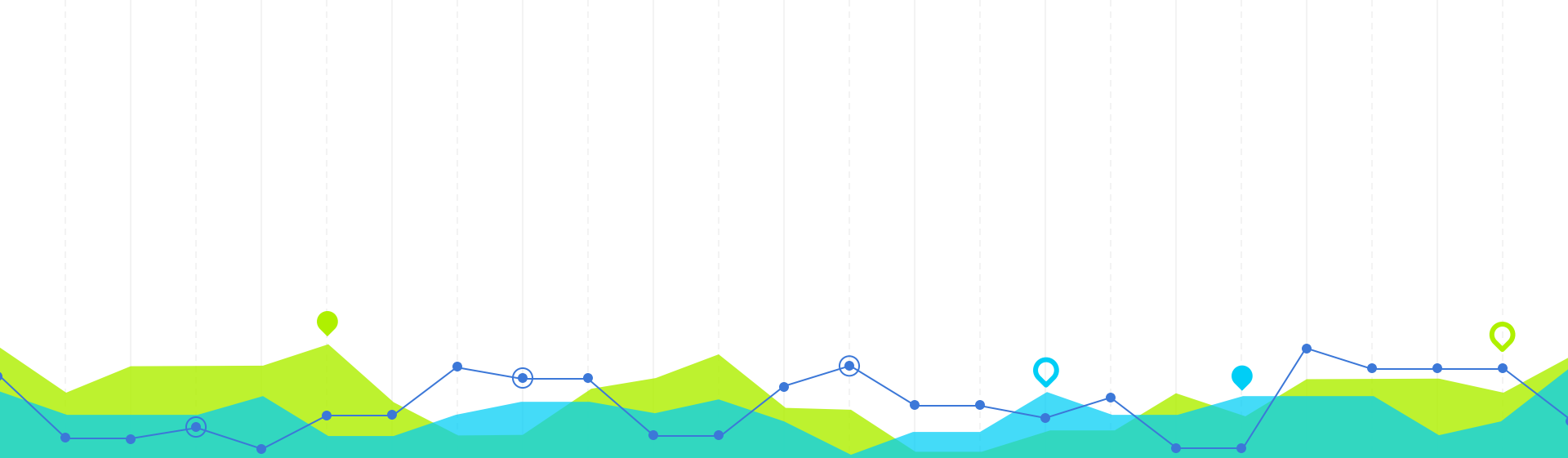
- Not a data expert!
- Worked in public and academic libraries, but not a community college library



TODAY'S PLAN

1. NC LIVE project
2. Lessons learned
3. Worksheet
4. Q&A





NC LIVE Project

Context and Planning

1

CHALLENGE

What engagement challenges do you face?

- 200+ member libraries
- Inconsistent data collection
- Reactive member engagement
- Gaps

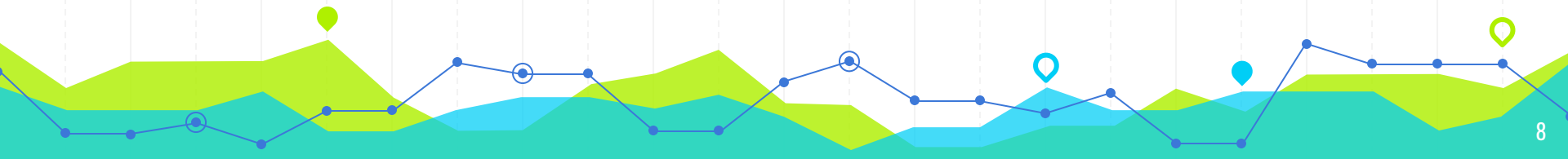


OPPORTUNITY

Software: Engagements module in Salesforce CRM



Annual Goal: Achieve *meaningful engagement* with 90% of member libraries



Meaningful Engagement:



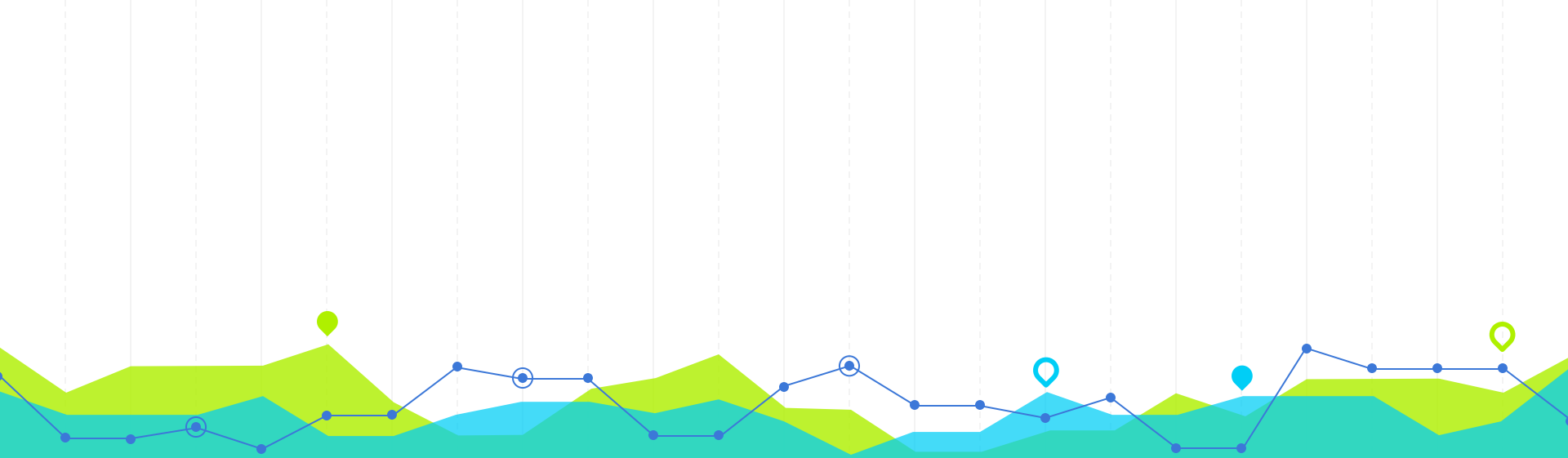
*Interaction with NC LIVE staff, services,
and/or resources which leads to a
change in behavior or understanding
of NC LIVE*



How does your
community
interact with your
library?

EXAMPLES

- Signing up for a new NC LIVE service
- Increasing resource usage
- Participating in committees or task forces
- Attending NC LIVE events
- Donating to HomeGrown



NC LIVE Project

In Practice

2

DATA-DRIVEN MEMBER ENGAGEMENT



Cases
All Cases ▼

50+ Items • Sorted by Date/Time Opened • Filtered by All cases • Updated a few seconds ago

	<input type="checkbox"/> Case Nu... ▼	Date/Time Ope... ↓ ▼	Subject ▼	Account Name ▼
1	<input type="checkbox"/> 00016207	3/5/2021 1:31 PM	Direct links to eBook centr...	Wake Technical C...
2	<input type="checkbox"/> 00016205	3/5/2021 12:41 P...	Fwd: EZProxy Access	Central Piedmont ...
3	<input type="checkbox"/> 00016204	3/5/2021 11:26 ...	Embed Code Issue	Wake Technical C...
4	<input type="checkbox"/> 00016203	3/5/2021 10:38 ...	Summons	South Piedmont C...

Engagements
All ▼

50+ Items • Sorted by Date • Filtered by All engagements • Updated a few seconds ago

	<input type="checkbox"/> Engagement Name ▼	Location ▼	Date ↓ ▼
1	<input type="checkbox"/> Community Colleges Roundtable 2		3/3/2021
2	<input type="checkbox"/> Community Colleges Roundtable		3/2/2021
3	<input type="checkbox"/> February Leadership Workshop		2/25/2021
4	<input type="checkbox"/> OPPAC Meeting February 2021		2/22/2021
5	<input type="checkbox"/> LC Meeting February 2021		2/19/2021
6	<input type="checkbox"/> February Resource Workshop		2/18/2021
7	<input type="checkbox"/> WAC Meeting February 2021		2/16/2021
8	<input type="checkbox"/> TAC Meeting February 2021		2/16/2021

Report: Accounts
Hosted Proxy Libraries

Total Records
124

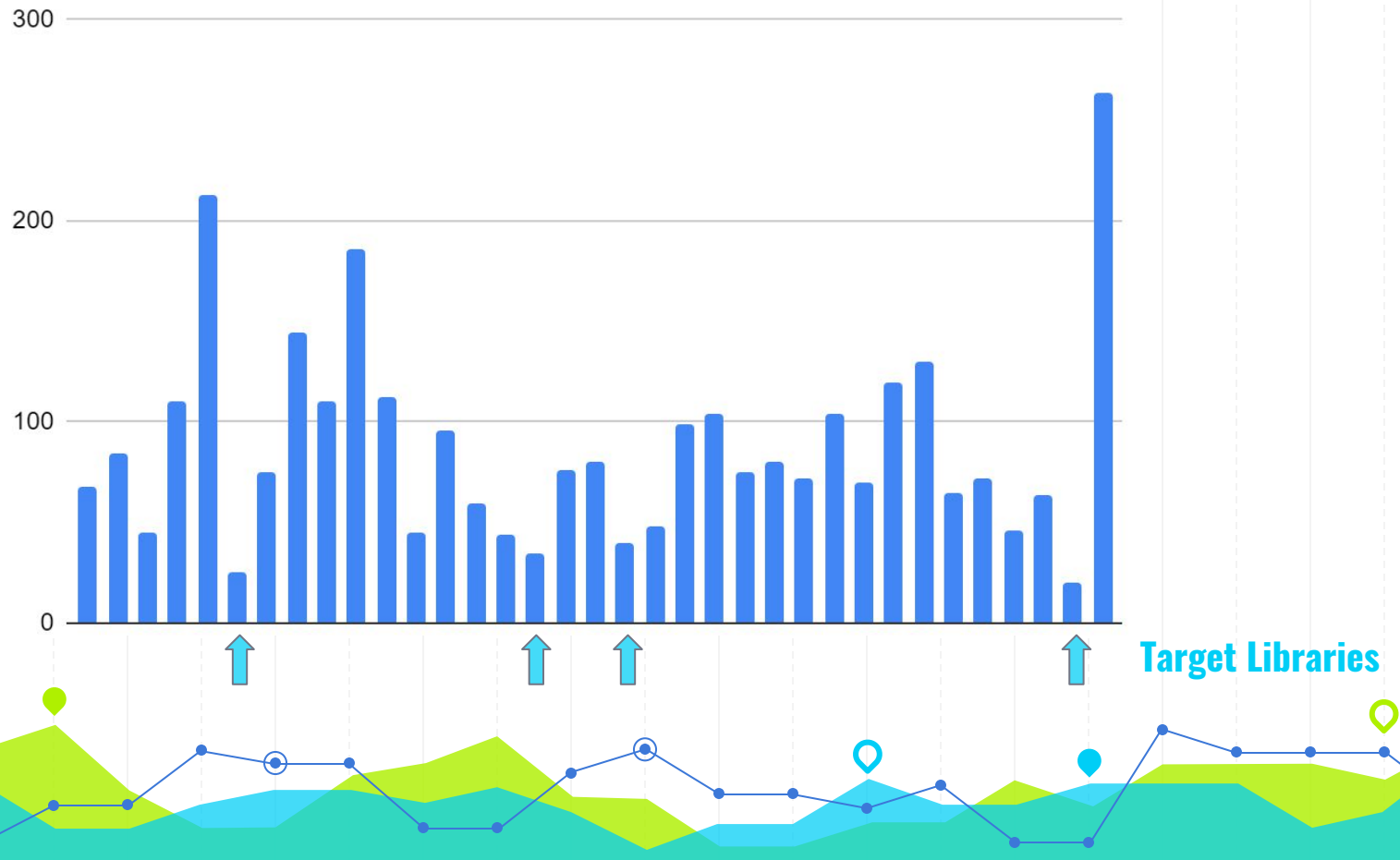
	Account Name ↑ ▼
1	Alamance Community College
2	Alamance County Public Libraries
3	Alexander County Library
4	Appalachian Regional Library
5	Appalachian State University
6	Avery-Mitchell-Yancey Regional Library
7	Barton College
8	Beaufort County Community College
9	Beaufort-Hyde-Martin Regional Library
10	Bennett College

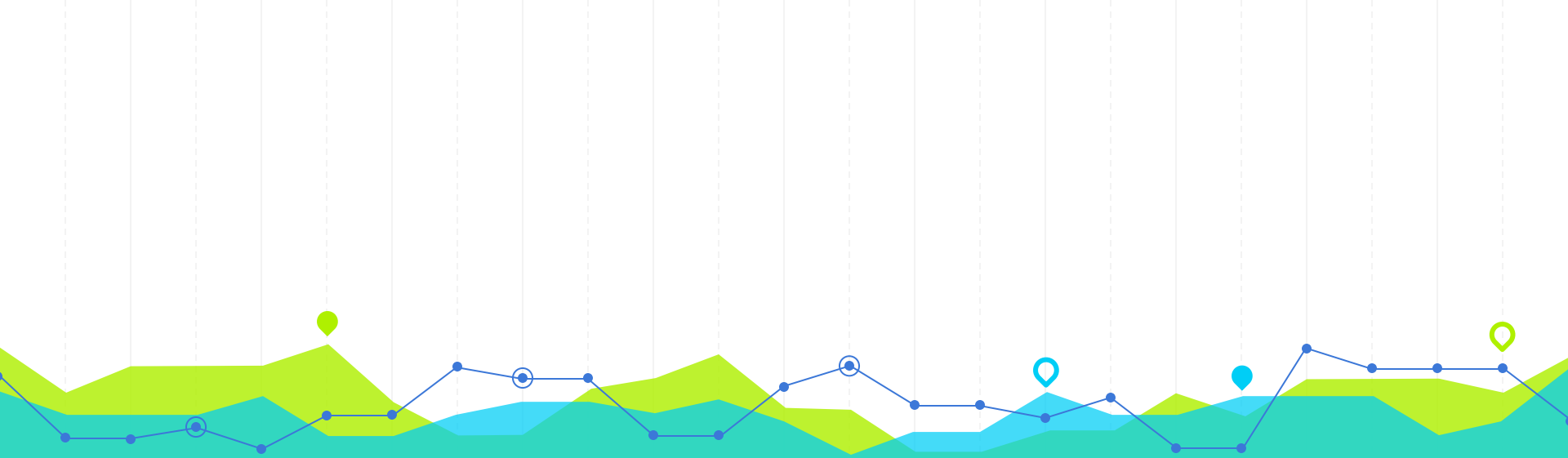
SALESFORCE

inst_id	name	Total	Hosted proxy libraires	Website services libraries	Online training- people per library	Summon libraries	OENC- Previous Year	Total	Committee Members	HomeGrown Pledge	Total	Help Desk Tickets	Engagement Calls
1	Alamance Community College	2	1				1		1	1		1	
204	Alamance County Public Libraries	1	1						1		1	1	
2	Albemarle Regional Library	1				1			0		0		
3	Alexander Public Library	2	1		1				0		0		
5	Appalachian Regional Library	4	1		3				0		0		
6	Appalachian State University	1	1						1	1	7	7	
9	Asheville-Buncombe Tech Community College	1					1		0		1	1	
10	Avery-Mitchell-Yancey Regional Library	0							0		0		
12	Barton College	3	1	1			1		0		12	11	1
13	Beaufort County Community College	5	1	1			1	2	0		9	9	
14	Beaufort-Hyde-Martin Regional Library	1	1						0		1	1	
15	Belmont Abbey College	2		1			1		0		4	4	
16	Bennett College	1	1						1	1	4	4	
17	Bladen Community College	0							0		1		1
18	Bladen County Public Library	1	1						0		0		
19	Blue Ridge Community College	1					1		0		0		
20	Brevard College	3	1				1	1	1		3	3	
21	Brunswick Community College	10	1	1	2		6		0		2	2	
22	Brunswick County Libraries	1			1				0		0		

GOOGLE SHEETS

ENGAGEMENT LEVEL



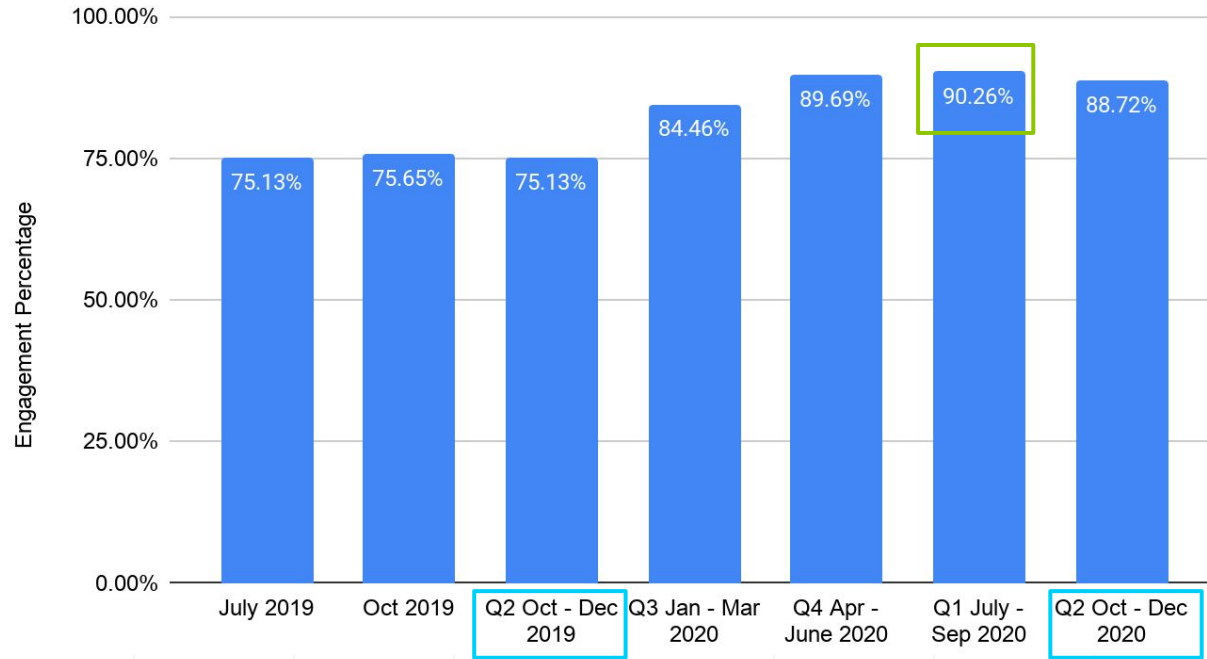


NC LIVE Project

Results

3

RESULTS



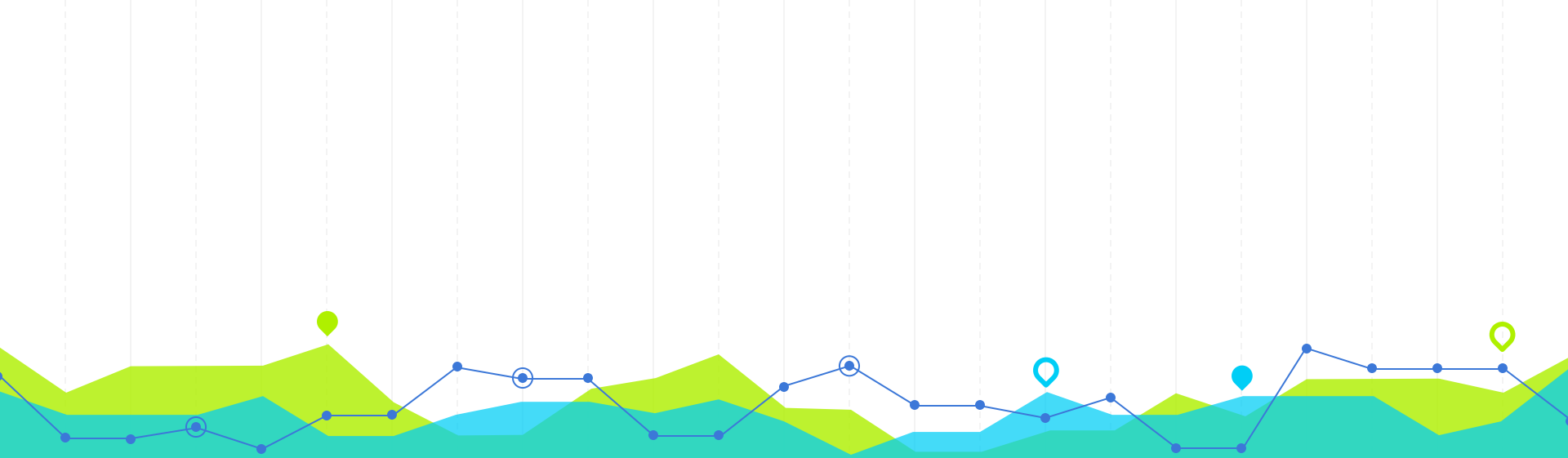
**Achieved 90%
engagement
goal**

**13% YoY
increase in
engagement**

PUBLIC LIBRARY EXAMPLE

- August 2019: Identified as under-engaged
- September 2019: Director meeting
- December 2019: Staff day training
- 2020: 47% YoY increase in resource usage





Lessons Learned

4

LESSONS LEARNED



Document Your Steps

Where do you retrieve your data?

What steps are there in the process?



Be Flexible

Are things going as planned?

What can you change to make your life easier?



Ask For Help

Who do you need to coordinate with?

Who has expertise?



Stay Focused on Goal

What is the overall goal?

How do you measure success?



Share Out

How can you get feedback?

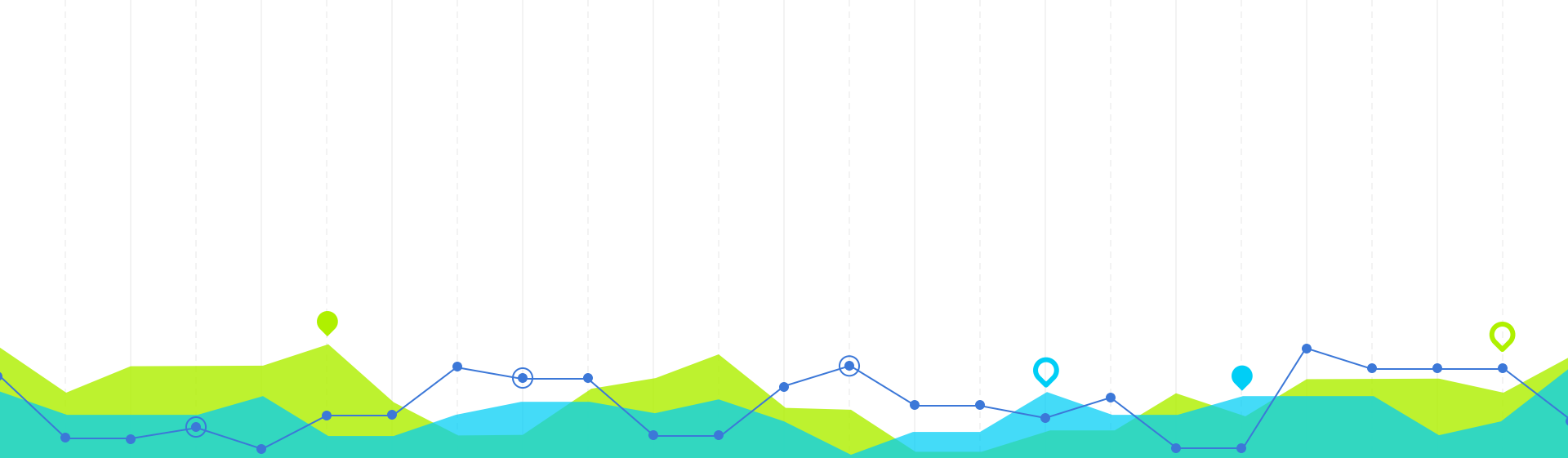
Who should know about your project?



Reflect

Did you achieve your goal?

What changes can you make to your process?



Worksheet

https://go.ncsu.edu/amelia_ncccla

5

Questions?

Amelia Rodarte

NC LIVE Community Engagement Librarian

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CREDITS

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