

ARL and SCONUL Assessment Initiatives: Synergies and Opportunities

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Florence, 2009

Summary

- SCONUL Initiatives
- ARL applications in SCONUL libraries
- Future international options and opportunities

Introduction

Communities of Practice

“groups of people who share a passion for something that they know how to do, and who interact regularly to learn how to do it better”

“coherence through mutual engagement”

Etienne Wenger, 1998 & 2002

Library Pressures for Accountability

There is a need to demonstrate the Library contribution in Universities in these two dimensions:

1. Financial, through “value for money” or related measures
2. Impact on research, teaching and learning

A global market for HE also implies that “competitive” data will be highly valued

New context for partnership

- Political changes (both sides of the pond?)
- Global financial crisis
 - Less funding but ...
 - ... more from existing resources, so more pressure for performance (and its measurement)
 - A return to a broader (and more traditional) values set, and an end to simple-minded reductionism?

SCONUL Initiatives

The UK & Ireland Experience

The SCONUL Working Group on Performance Improvement

- Ten years of “toolkit” development to assist in performance measurement and improvement
- SCONUL ‘Top concern survey’ 2005
- The SCONUL Value and Impact Measurement Programme (VAMP)

Examples of tools developed 1

- Integration
 - Quality assurance Guidelines*
- Efficiency & Comparability
 - SCONUL Statistics & interactive service*
 - HELMS national performance indicators*
 - E-measures project*
 - Benchmarking Manual*

Examples of tools developed 2

- Quality & Satisfaction
 - SCONUL Satisfaction Survey*
 - SCONUL LibQUAL+ Consortium*
- Impact
 - LIRG/SCONUL Impact Initiative*
 - Information Literacy Success Factors*

SCONUL Member Survey Findings

- 70% undertaken value or impact measurement
- Main rationales are advocacy, service improvement, comparison
- Half used in-house methodologies; half used standard techniques
- Main barrier is lack of tools,
 - Creating issues of time and buy-in

Member Survey Conclusions

- There is a need to demonstrate value and that libraries make a difference
- Measurement needs to show 'real' value
- Need to link to University mission
- Libraries are, and intend to be, ahead of the game
- Impact may be difficult or impossible to measure
- All respondents welcomed the programme, and the prospect of an available toolkit *with robust and simple tools*

VAMP Objectives

- New *missing* measurement instruments & frameworks
- A full coherent **framework** for performance, improvement and innovation
- **Persuasive** data for University Senior Managers, to prove value, impact, comparability, and worth

Missing methods

- An impact tool or tools, for both teaching & learning and research (from the LIRG/SCONUL initiative?)
- A robust Value for Money/Economic Impact tool
- Staff measures
- Process & operational costing tools

VAMP Project Structure

- Analysis March-June 2006
- Tools I (Impact) - June 2007
- Site Development - June 2007
- Tools II (Value) - in progress
- CoP development
- Maintenance

The 'Performance Portal'

- A Wiki of library performance measurement containing a number of 'approaches', each (hopefully) with:
 - A definition
 - A method or methods
 - Some experience of their use in libraries (or links to this)
 - The opportunity to discuss use



Society of College, National and University Libraries

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The Performance Portal



Welcome to the SCONUL Performance Portal. This site has been developed by the [Working Group on Performance Improvement \(WGPI\)](#) on behalf of SCONUL, to create and encourage a community of practice in library performance, measurement, assessment and evaluation.

The WGPI has a continuing commitment to provide a toolkit of data, measurement techniques and instruments in the field of library performance measurement. This site provides a selection of approaches intended to assist College, National and University libraries in demonstrating their value and worth to senior stakeholders within their institutions.

For each approach to measuring library performance there is:

- a definition and introduction,
- a methodology designed to help you implement the approach at your institution,
- an experience page containing supporting resources, and

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- [How to add content to the Performance Portal](#)

Topic Area/Approach

- [Charter Mark](#)
- [Customer Satisfaction Surveys](#)
- [EFQM Excellence Model](#)
- [HELMS Statistics](#)
- [Impact Initiative](#)



Society of College, National and University Libraries

LibQUAL+

[Return to Quality](#)



LibQUAL+ is a Web based survey tool which uses the Gap Theory of Service Quality to ascertain what the users expect from the library service as well as how they perceive the quality of service received. It is a standardised instrument which enables benchmarking at a local, national and international level.

What is LibQUAL+?

LibQUAL+ is a suite of services that libraries use to solicit, track, understand, and act upon users' opinions of service quality. These services are offered to the library community by the Association of Research Libraries (ARL). The programme's centerpiece is a rigorously tested web-based survey bundled with training that helps libraries assess and improve library services, change organisational culture, and market the library. The goals of LibQUAL+ are to:

- Foster a culture of excellence in providing library service
- Help libraries better understand user perceptions of library service quality
- Collect and interpret library user feedback systematically over time
- Provide libraries with comparable assessment information from peer institutions
- Identify best practices in library service
- Enhance library staff members' analytical skills for interpreting and acting on data

How will LibQUAL+ benefit your institution?

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Topic Area/Approach

- [Charter Mark](#)
- [Customer Satisfaction Surveys](#)
- [EFQM Excellence Model](#)

- Definition
- Method**
- Discussion Forum

LibQUAL+

[Return to LibQUAL+](#)



1. Conducting the survey

Details on registration, when you can run the survey, and the Procedures Manual.

[Read more ...](#)

2. Registration Process

Step-by-step details on how to register for LibQUAL+ for SCONUL participants.

[Read more ...](#)

3. Pre-Survey Tasks

How to set up the survey, including setting your preferences and customising your survey.

[Read more ...](#)

4. Running Your Survey

Suggestions on promoting your survey and help on the Representativeness data.

[Read more ...](#)

5. After the Survey

Understanding and interpreting your results, and how to make the most out of your data.

[Read more ...](#)

6. More Information

Further useful contacts.

[Read more ...](#)

[All content on one page](#)

How To Add Content

How to add content to the Performance Portal

Search LibQUAL+

LibQUAL+

- 1. Conducting The Survey
- 2. Registration Process
- 3. Pre-Survey Tasks
- 4. Running Your Survey
- 5. After The Survey
- 6. More Information

[All Content On One Page...](#)

Help

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Topic Area/Approach

Communications



General Discussion Forums

The Discussion Forums are for users to discuss any topic on the Performance portal. The Discussion Forums are asynchronous, ie they are not occurring in real time. These are forums for general Performance conversations.

You need your username and password to access the Discussion Forums. Posts are not checked by the SCONUL moderator before you publish, but anyone posting offensive comments will be removed from the user list.



[*Go to the discussion forums*](#)

Approach Discussion Forums

The Discussion Forums are for users to discuss any topic on the Performance portal. The Discussion Forums are asynchronous, ie they are not occurring in real time. There is a forum for conversations on individual Approaches - these are also accessible and searchable from the relevant Approach page.

You need your username and password to access the Discussion Forums. Posts are not checked by the SCONUL moderator before you publish, but anyone posting offensive comments will be removed from the user list.



[*Go to the discussion forums*](#)

Chat with Sconul Members

To access the Chat Room you need your username and password. The Chat Room is synchronous - ie you are chatting to other people in real time. Posts are not checked by the SCONUL moderator before you publish, but anyone posting offensive comments will be removed from the user list.



[*Go to the chat facility*](#)

Skype with Sconul Members

Skype is a voice over IP service (which means you are making calls over the internet, rather than via the telephone network) that allows you to call other people who have also downloaded the software, for free, all over the world. Skype is available from skype.com, although you will need administrator rights to install it on your computer.



[*Go to the skype facility*](#)

How To Add Content

 How to add content to the Performance Portal

Topic Area/Approach

-  Charter Mark
-  Customer Satisfaction Surveys
-  EFQM Excellence Model
-  HELMS Statistics
-  Impact Initiative
-  Investors in People
-  LibQUAL+
-  Priority Research
-  SCONUL Annual Library Statistics
-  SCONUL Satisfaction Survey
-  SCONUL Statistical Questionnaire
-  SCONUL Statistics
-  SCONUL Statistics on the Web
-  SCONUL Statistics Trend Analysis

All topics and approaches...



New to LibQUAL+

▲ Up to Discussion Forum for LibQUAL+



Posted by [Member Selena](#) at Monday 12:04

Our library is looking to use LibQUAL+ next year for the first time. Is there anyone out there who's use it before who could give me some advice?



log in to add comments

Posted by [Selena Lock](#) at Monday 12:09

Hi,

We've used LibQUAL+ before, what did you want to know? Happy to give advice!



Selena.

log in to add comments

How To Add Content

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Search

Help

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Topic Area/Approach

- Charter Mark
- Customer Satisfaction Surveys
- EFQM Excellence Model
- HELMS Statistics
- Impact Initiative
- Investors in People
- LibQUAL+

Association of Research Libraries (ARL) Initiatives

ARL Initiatives

The ARL Statistics and Measurement program focuses on describing and measuring the performance of research libraries and their contributions to research, scholarship, and community service. ARL serves a leadership role in the development, testing, and application of academic library performance measures, statistics, and management tools.

Grounded in the tradition of the North American research library environment, the program provides analysis and reports of quantitative and qualitative indicators of library collections, personnel, and services by using a variety of evidence gathering mechanisms, and tools.

ARL Initiatives and crossover

- LibQUAL+ (& SQA)
- ClimateQual
- DigiquaL
- MINES
- Emetrics
- ESP
- LAC & Blog
- Assessment SPEC Kit
- International
- Comparable efforts
- 3 international
- Participation
- UK version due 2009

Application of ARL initiatives within SCONUL Libraries

Potential barriers to export

- Library conceptual differences
- Scale differences
- Accountability environment
- Academic Quality context
- Cultural and linguistic factors
- Practical application factors
- US more certain of library worth?
- Real but over-rated?
- Internally similar
- Externally different
- Terminological rather than actual?
- Little evidence

Case 1: LibQUAL+

- Seven years experience
- Successful application; high proportion of returners; high market penetration
- Benefits and actions generated in SCONUL libraries
- Concept and methodology transferable
- Embedded and sustainable practice

Findings & Comparisons

- Similar profile of results
- Slightly less positive overall, although some very good and improving individual UK results
- More concern in the UK over Library as Place; occasionally overtaking Affect of Service in importance
- Benchmarking seen as a major benefit

Case 2: Effective and Sustainable Assessment Programme (ESP)

- One instance; other potential interest
- Successful application; well received in UK institution due to international focus
- Substantial agenda generated showing considerable insight (strategic influence)
- Concept and methodology transferable
- Sustainability? Local Program Officers?

Case 3: SPEC Kit Survey

- Survey acceptable with modifications
- Generated similar response rate in UK libraries
- Concept transferable; terminology issue: **assessment versus performance measurement**
- Comparative research, possible value beyond local audiences

Synergies and Opportunities

Potential agenda for collaboration?

- Statistical convergence
- Standard costing methods
- Impact research
- Culture measurement and development
- Value and value added concepts and methods

Statistical Convergence & Costing

- York Meeting, 2008
 - OCLC/RLG
 - ARL
 - SCONUL
 - CAUL
- In one 2008 international benchmarking study; only one institution (out of eight) had a comprehensive costing model

What is value?

- Cost efficiency
- Cost effectiveness
- Cost comparison
- Financial management process standards & audit
- Financial allocation
- Valuation (including contingent valuation)
- **Value added**
- Return on investment
- Best value

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