LibQUAL+® Administration and Organizational Buy-In

Presented by:

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Association of Research Libraries

Strategic Assessment of Library Services at HBCUs
Atlanta Airport Marriott, 711 Best Road, Atlanta, GA 30337
Tuesday, October 25, 2011

www.libqual.org
Overview

• Preparing for the Survey Implementation
  – Defining survey objectives/desired outcomes
  – Institutional Review Board
  – Sampling
  – Creating an assessment group/team
  – Preparing the organization
  – Marketing Your Survey

• Online System: Management Center
Preparing for the Survey Implementation
Why is Your Library Participating in LibQUAL+®?

• Institutional goals:
  – what do you want to get out of the survey?

• Survey requirements:
  – people, supplies, technology
Get Permission from your Institutional Review Board

- Local group that approves human subject research
- May also be called
  - Committee for Human Subject Research
  - Committee for the Protection of Human Subjects
- Not all institutions need to obtain permission
Get Permission from your Institutional Review Board

• If permission is required:
  – Seek well in advance of survey
  – Supply a copy of the survey, if requested
  – Inform them that results will be shared among participants

• No need to inform LibQUAL+® of decision
Determine Whom to Survey

• Random sample
  or
• Entire population
If You Sample...

• Recommendations:
  – At least 1,200 random email addresses for each user group
  – Separate sample groups for undergraduates, graduates, faculty, and staff
  – Think about survey fatigue if you want to repeat the survey regularly

• Keep notes on your methodology as you will be asked to describe it in the Post Hoc Questionnaire
If You Survey the Entire Population…

• Recommendations:
  – Think about survey fatigue if you want to repeat the survey regularly

• Keep notes on your methodology as you will be asked to describe it in the Post Hoc Questionnaire
Obtain Email Addresses

• Typical sources include:
  – Campus computing office
  – Campus administrative records office
  – Library patron database
Become Familiar with LibQUAL+® Resources

• Manage Your Survey
  http://www.libqual.org/

• LibQUAL+® Procedures Manual
  – Updated Version – 2012
  – Much more detail

• Discussion list
  LIBQUAL-L@listserv.tamu.edu
Marketing Your Survey

– Place ads in campus newspaper
– Write article for library newsletter
– Post flyers around campus
– Present at faculty meetings & student orientations
– Create a survey Web site and feature on library’s home page
– Take the survey to where users are: dining halls, study rooms, dorms
– More suggestions and example works are available on Publications Page
The LibQUAL+® Management Center (aka Your Friend)

Survey Dashboard

Welcome to LibQUAL+®!

Download the new 2010 Procedures M

We are delighted to offer to you a new platform that supports features like LibQUAL+®.

To get started, please do the following:

- **To view or add users to your institution's account**, visit the 'Manage Users' navigation area on the left. Here you can manage access to this website by managing users.

- **To view and set user permissions for your survey run (available Jan. 2010)**, visit the Management Center. Here you can set a user's role in administering your LibQUAL+® survey.

- **To configure and launch your survey (available Jan. 2010)**, visit the survey configuration section.

www.libqual.org
Survey Process: Manage Your Survey

Eight Sections:
- Preferences
- Customization
- Preview
- Representativeness
- Monitor Survey Progress
- Incentive Winners
- Post Hoc
- Evaluation

Stage 1) Pre-launch

A. Configure Your Survey

Configure your LibQUAL+® survey using the tabs below. You must save your progress along the way using the “Save” button at the bottom of the page, enabling the system to retain your selections without completing the entire survey set-up process in one session.

Preferences

Please follow the instructions below to select your survey preferences.
- Survey Title—Please choose a label to display on your results report. This label should not be more than 50 characters long.
- Survey Start and End Dates—Please indicate the dates you intend to open and close the survey at your institution. Note that these dates are for our information only and are not binding. You must manually open and close your survey.
- Liteview Percentage—There are two versions of this survey: the full version with 22 core questions and a “Lite” version with 8 core questions. Please enter the percentage of patrons who should receive the shortened “Lite” survey.
- Reporting Language—Please select one of your languages for use in your notebook and other reports.

B. Preview Your Survey

Preview the LibQUAL+® survey as it will appear to users at your institution. This step allows you to ensure that your survey is correct before it goes live at your institution. You must view and complete a preview of your survey in every language in which it is being offered before you will be permitted to launch your survey. Use the checklist at the right to ensure all previews have been completed.

C. Launch Your Survey

Click the button below to launch your survey and receive your URL(s) for distribution. Note that the button will not be activated until all previews are completed. Also be aware that once your survey is launched, no further changes or customizations can be made.
Manage Your Survey: Customization

Stage 1) Pre-launch

A. Configure Your Survey
Configure your LibQUAL+® survey using the tabs below. You must save your progress along the way using the "Save" button at the bottom of the page, enabling the system to retain your selections without completing the entire survey setup process in one session.

- **Customization**
  - Upload your Institution’s Logo—Your Institution’s logo will be displayed at the top of the survey. The image must be a JPEG, GIF, or PNG file; 800x800 pixels or smaller, and its file size must be less than 200 KB.
  - Support E-mail Address—Provide an e-mail address to appear on your survey as the first point of contact for survey-takers who have questions or concerns. We recommend that your institution set up a designated personal account just for these e-mails.
  - Incentives—if you will be providing an incentive prize to one or more randomly-selected survey-takers, check the box at the right. If you choose this option, your survey-takers will then be asked for their e-mail addresses at the bottom of the survey. After you close your survey, you can access a list of 50 randomly-selected winners.

B. Preview Your Survey
Preview the LibQUAL+® survey as it will appear to users at your institution. This step allows you to ensure that your survey is correct before it goes live at your Institution. You must view and complete a preview of your survey in every language in which it is being offered before you will be permitted to launch your survey. Use the checklist at the right to ensure all previews have been completed.

C. Launch Your Survey
Click the button below to launch your survey and receive your URL(s) for distribution. Note that the button will not be activated until all previews are completed. Also be aware that once your survey is launched, no further changes or customizations can be made.
Manage Your Survey: Customization - Local Questions

Stage 1) Pre-launch

A. Configure Your Survey

Configure your LibQUAL+® survey using the tabs below. You must save your progress along the way using the "Save" button at the bottom of the page, enabling the system to retain your selections without completing the entire survey set-up process in one session.

Optional Questions

Use this tab to add extra questions to your survey, selected from a list provided below. This list contains only optional questions available in ALL the languages in which you are offering your survey. You can choose to add either five questions or none. If you do not want optional questions, leave the form blank. No other number of questions is allowed. These five optional questions will be interspersed within the core questions on the survey.

To view a list of all optional questions for your selected languages click here.

- To add an optional question to your selected list: click the ‘+’ icon adjacent to the question in the ‘Available’ list.
- To remove an optional question from your selected list: click the ‘x’ icon adjacent to the question.

<table>
<thead>
<tr>
<th>Available</th>
<th>Selected</th>
</tr>
</thead>
<tbody>
<tr>
<td>A center for intellectual stimulation</td>
<td></td>
</tr>
<tr>
<td>A contemplative environment</td>
<td></td>
</tr>
<tr>
<td>A haven for quiet and solitude</td>
<td></td>
</tr>
<tr>
<td>A library environment that is hospitable and conducive to finding and using information</td>
<td></td>
</tr>
<tr>
<td>A meditative place</td>
<td></td>
</tr>
<tr>
<td>A place for reflection and creativity</td>
<td></td>
</tr>
<tr>
<td>A secure and safe place</td>
<td></td>
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</tbody>
</table>
Manage Your Survey: Customization - Disciplines

• Results notebooks summarize findings by user group and provide a chart for both standard and custom disciplines

• Standard disciplines (based on your institution type, i.e., College/University)

• Customized disciplines
  – Recommend no more than 16 disciplines, if possible
Manage Your Survey: Customization – Standard Disciplines

- Agriculture/Environmental Studies
- Architecture
- Business
- Communications/Journalism
- Education
- Engineering/Computer Science
- General Studies
- Health Sciences
- Humanities
- Law
- Military/Naval Science
- Other
- Performing & Fine Arts
- Science/Math
- Social Sciences/Psychology
- Undecided

*Note: Disciplines are for an Academic Library*
Manage Your Survey: Customization – Customized Disciplines

- Use your local terminology to map to the standard disciplines

- Cautions:
  - Need to provide representativeness data for each discipline
  - Too many choices present challenges to users
Stage 1) Pre-launch

A. Configure Your Survey

Configure your LibQUAL+® survey using the tabs below. You must save your progress along the way using the "Save" button at the bottom of the page, enabling the system to retain your selections without completing the entire survey setup process in one session.

Discipline Options

This tab enables you to select the discipline terms that you want to use in the demographics section of your LibQUAL+® survey. The standard discipline terms for each of your survey languages appear below by default. You may choose to use some or all of the LibQUAL+® standard discipline terms, or you may choose to create your own discipline categories. If you choose to add your own categories, they MUST be mapped to a LibQUAL+® standard discipline for data analysis purposes. (Please make sure your new terms relate to the standard disciplines; in other words, do not enter "Accounting" and map it to "Architecture." Your disciplines will appear in the order they appear below. Be careful to enter new terms exactly as you want them to appear on your survey! Make a note to check your discipline options for any spelling, grammatical, or formatting errors here as well as during the "preview" stage.

- To amend a discipline option: click on the option field and make changes. You can also reassign the option to another standard discipline category if desired.
- To remove a discipline option: click the 'x' icon adjacent to the option row. Note that if you do this by mistake, you will need to recreate the option by adding a new one.
- To add a discipline option: click the 'Add New Option' button.

<table>
<thead>
<tr>
<th>Discipline (AM, C/U, HS):</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Options</strong></td>
</tr>
<tr>
<td><strong>Reporting Value</strong></td>
</tr>
<tr>
<td>1. Agriculture/Environm</td>
</tr>
<tr>
<td>2. Architecture</td>
</tr>
<tr>
<td>3. Business</td>
</tr>
<tr>
<td>4. Communications/Journ</td>
</tr>
<tr>
<td>5. Education</td>
</tr>
<tr>
<td>6. Engineering/Computer</td>
</tr>
<tr>
<td>7. General Studies</td>
</tr>
<tr>
<td>8. Health Sciences</td>
</tr>
<tr>
<td>9. Humanities</td>
</tr>
<tr>
<td>10. Low</td>
</tr>
<tr>
<td>11. Military/Naval Science</td>
</tr>
<tr>
<td>12. Other</td>
</tr>
<tr>
<td>13. Performing &amp; Fine Arts</td>
</tr>
<tr>
<td>14. Science/Math</td>
</tr>
</tbody>
</table>
Manage Your Survey: Customization - Standard Disciplines

*Note: Disciplines are for an Academic Library*
Manage Your Survey: Customization - Customized Disciplines

*Note: Disciplines are for an Academic Library*
Manage Your Survey: Branch Library

Stage 1) Pre-launch

A. Configure Your Survey

Configure your LibQUAL+® survey using the tabs below. You must save your progress along the way using the “Save” button at the bottom of the page, enabling the system to retain your selections without completing the entire survey set-up process in one session.

Branch Library Options

In this tab you can specify the options from which users will choose their response to the question, “The library that you use most often.” If you do not want to include this question on your survey (for example, if your institution has only one library), simply leave the area below empty.

If you enter options, the question will be included in the demographics section of the survey. Responses to this question will be returned to you as part of your survey data file, but will not be reported in your results notebook. The libraries added will appear in the order they are listed on this tab in the survey form.

- To add a library option: click the ‘Add New Option’ button.
- To amend a library option: click on the option’s text field and make changes.

The library you use most often.

See how this question will appear on the survey in English (American)
Sending Reminders

• 3-5 reminders to sample populations
• Include a thank you to respondents who have completed the survey
• Boost marketing efforts around campus
  – More flyers, table tents, ads in campus newspaper
  – Get professors and other staff involved
  – Increase number or types of incentives
## Manage Your Survey: Previewing and Approving Your Survey

<table>
<thead>
<tr>
<th>Preview</th>
<th>Approved</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Complete at least <strong>one</strong> full run of your preview survey&lt;br&gt;• Test in different settings, using different platforms and Web browsers&lt;br&gt;• Get library staff involved in testing</td>
<td>• Can no longer make changes&lt;br&gt;• Live survey URL</td>
</tr>
</tbody>
</table>
Representativeness Questionnaire

• Determines how your institutional profile compares to your survey data
• Requires the following information:
  – # of individuals per user group
  – # of individuals within each discipline
  – # of males and females
  – Library Statistics
    • Volumes added during the year – Gross/Total (including e-books)
    • Total number of current serials received (including electronic serials)
    • Total library expenditures (U.S. dollars)
    • Personnel – professional staff, full-time equivalent (FTE)
    • Personnel – support staff, full-time equivalent (FTE)
• Complete **BEFORE** closing survey
Completed Representativeness Questionnaire

Representativeness Completed

Representativeness NOT Completed

www.libqual.org
Closing Your Survey

• We recommend a survey run of at least 3 weeks

• Once you close your survey:
  – Retrieve list of incentive winners
  – Fill out Post Hoc and Evaluation Questionnaires
Manage Your Survey: Completing Post Hoc & Evaluation Questionnaires

**Post Hoc Questionnaire**
- Information about your survey
  - Sample size
  - # of e-mails sent
  - # of invalid e-mail addresses
  - Incentives offered
  - Marketing techniques
  - Etc.

**Evaluation Questionnaire**
- Feedback about your LibQUAL+® experience
- All survey liaisons and assistants are encouraged to complete this questionnaire
Retrieving Survey Results

• Survey Results Notebook (PDF)
  – Individual & Group Analyses
• Comments
  – About half of users provide comments
  – Download Excel file under Monitor Survey Progress
    (see Manage Your Survey)
• Excel/SPSS data files
• Additional Services:
  – Customized Discipline Analysis
  – Library Branch Analysis
  – Other Customized Analyses (upon request)
  – Print Copies
General Discussion and Q&A
The LibQUAL+® Team

- The best way to contact us: libqual@arl.org

- **David Green**
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