LibQUAL+® Survey Administration

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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 for 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
Welcome to LibQUAL+®!

Download the new 2010 Procedures Manual

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 area.
LibQUAL+® Management Center: Getting Started

• Login *(Required to use the Management Center)*

• Center Sections:
  – Manage Surveys
  – Manage Users
  – Manage Permissions
  – Data Repository
  – Organization Websites
  – Directory

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*Survey Dashboard*

**Welcome to LibQUAL+®!**

**2012 Procedures Manual**

We are delighted to offer you a platform that supports features like LibQUAL+® Lite and other enhancements. LibQUAL+® Lite is a new customizing feature that you will set during configurations, not at the time of registration.

**Getting started:**

• **To view or add users to your institution's account,** visit the 'Manage Users' link of the Management Center (found in the navigation area on the left). Here you can manage access to this website by members of your staff.

• **To view and set user permissions for your survey run,** visit the 'Manage Permissions' link of the Management Center. Here you can set a user's role in administering your LibQUAL+® survey. Manage Permissions is only relevant when your institution is currently registered to run a LibQUAL+® survey.
Survey Process: Manage Your Survey

Four Stages
1. Pre-Launch
2. Monitor Survey Progress
3. Close My Survey
4. Post-Survey and Results

Stage 1
Manage Your Survey: Stage 1 - Customization

Customization

- Survey Title—Please choose a label to display at the top of your survey. This label should not be more than 60 characters long.

- 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, 600x200 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.

- Lite-view Percentage—There are two versions of this survey: the long 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.

- 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.

- 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.

- Reporting Language—Please select one of your languages for use in your notebook and other reports.

Always save your work

www.libqual.org
Manage Your Survey:
Stage 1 - Optional Questions

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 (thus, if you attempt to save with fewer than five questions selected, none of them will be saved). 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.

Select optional questions chosen by SCONUL: Consortium Questions

www.libqual.org
Manage Your Survey: Stage 1 - Branch Library

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.
- To remove a library 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.

"The library that you use most often:"
Manage Your Survey: Stage 1 - 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: 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: 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
Manage Your Survey:
Stage 1 - Customized Disciplines

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 term(s) relate to the standard disciplines; in other words, do not enter “Accounting” and map it to “Architecture.”) Your disciplines will appear in alphabetical order. 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 text 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>Option</th>
<th>English (American)</th>
<th>Reporting Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Agriculture / Environment</td>
<td>Agriculture / Environmental Studies</td>
<td>X</td>
</tr>
<tr>
<td>2. Architecture</td>
<td>Architecture</td>
<td>X</td>
</tr>
<tr>
<td>4. Communications / Journal</td>
<td>Communications / Journalism</td>
<td>X</td>
</tr>
<tr>
<td>5. Education</td>
<td>Education</td>
<td>X</td>
</tr>
<tr>
<td>7. General Studies</td>
<td>General Studies</td>
<td>X</td>
</tr>
<tr>
<td>8. Health Sciences</td>
<td>Health Sciences</td>
<td>X</td>
</tr>
<tr>
<td>9. Humanities</td>
<td>Humanities</td>
<td>X</td>
</tr>
<tr>
<td>10. Law</td>
<td>Law</td>
<td>X</td>
</tr>
<tr>
<td>11. Military / Naval Science</td>
<td>Military / Naval Science</td>
<td>X</td>
</tr>
<tr>
<td>12. Other</td>
<td>Other</td>
<td>X</td>
</tr>
<tr>
<td>13. Performing &amp; Fine Arts</td>
<td>Performing &amp; Fine Arts</td>
<td>X</td>
</tr>
<tr>
<td>14. Science / Math</td>
<td>Science / Math</td>
<td>X</td>
</tr>
<tr>
<td>15. Social Sciences / Psych</td>
<td>Social Sciences / Psychology</td>
<td>X</td>
</tr>
<tr>
<td>16. Undecided</td>
<td>Undecided</td>
<td>X</td>
</tr>
</tbody>
</table>

See how this question will appear on the survey in English (American).
Manage Your Survey: Results Notebook - Standard Disciplines

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

*Note: Disciplines are for an Academic Library*
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:
### Stage 1 - Previewing Your Survey & Launch

### Preview
- Complete at least **one** full run of your preview survey
- Test in different settings, using different platforms and Web browsers
- Get library staff involved in testing

### Launch
- Can no longer make changes
- Live survey URL
Manage Your Survey:  
Stage 2 - 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
Manage Your Survey:
Stage 3 - Closing Your Survey

• We recommend a survey run of at least 3 weeks
• Confirm you want to close – irreversible step
Manage Your Survey:
Stage 4 - Post-Survey Tasks

Manage Survey
Stage 4) Post-Survey and Results
Thanks for running your LibQUAL+® survey!
Your survey is now closed and no longer accepting responses.

Representativeness Questionnaire
Please make sure you have completed your Representativeness Questionnaire. Your Results Notebook will not be created until you have acknowledged that it is complete or that you are leaving it blank.

- I acknowledge that my representativeness questionnaire is complete.
- I acknowledge that my representativeness questionnaire is left blank intentionally.

Other Questionnaires
- Post Hoc Questionnaire
- Evaluation Questionnaire
Manage Your Survey:
Stage 4 - Results

Data

- Results Notebook
- View/Download Comments
- Download Raw Data and Key for Variable Names and Key for Option IDs and SPSS Syntax File

Below are links to print-friendly surveys for archival purposes.

Manage Your Survey: 
Stage 4 – Incentive Winners

A list of randomly selected e-mail addresses is displayed below. These addresses were drawn from those individuals who took the survey at your institution and chose to enter their e-mail address. Use this list as you think best to distribute your local incentive prize(s). Our congratulations to your winners!

We recommend that you save a copy of this list if you think you will need to refer to it in the future. This page will be removed when next year’s survey registration begins. Download the winner list in CSV format.

<table>
<thead>
<tr>
<th>Place</th>
<th>Email Address</th>
<th>User Group</th>
<th>Discipline</th>
<th>Branch</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td><a href="mailto:meghanbh3@tamu.edu">meghanbh3@tamu.edu</a></td>
<td>Undergraduate</td>
<td>General Studies</td>
<td>Sterling C. Evans Library</td>
</tr>
<tr>
<td>2</td>
<td><a href="mailto:diana_linhart@tamu.edu">diana_linhart@tamu.edu</a></td>
<td>Undergraduate</td>
<td>Education &amp; Human Development</td>
<td>Sterling C. Evans Library</td>
</tr>
<tr>
<td>3</td>
<td><a href="mailto:steederswan@tamu.edu">steederswan@tamu.edu</a></td>
<td>Undergraduate</td>
<td>Dwight Lock College of Engineering</td>
<td>Sterling C. Evans Library</td>
</tr>
<tr>
<td>4</td>
<td><a href="mailto:guangyi.ma@neu.tamu.edu">guangyi.ma@neu.tamu.edu</a></td>
<td>Graduate</td>
<td>Liberal Arts</td>
<td>PSEL - Policy Sciences &amp; Economics Library</td>
</tr>
<tr>
<td>5</td>
<td><a href="mailto:b-triplett@tamu.edu">b-triplett@tamu.edu</a></td>
<td>Graduate</td>
<td>Agriculture &amp; Life Sciences</td>
<td>Sterling C. Evans Library</td>
</tr>
<tr>
<td>6</td>
<td><a href="mailto:jin_zhang@tamu.edu">jin_zhang@tamu.edu</a></td>
<td>Graduate</td>
<td>Architecture</td>
<td>Sterling C. Evans Library</td>
</tr>
<tr>
<td>7</td>
<td><a href="mailto:swpark71@neu.tamu.edu">swpark71@neu.tamu.edu</a></td>
<td>Graduate</td>
<td>Dwight Lock College of Engineering</td>
<td>Other</td>
</tr>
<tr>
<td>8</td>
<td><a href="mailto:augar@tamu.edu">augar@tamu.edu</a></td>
<td>Library Staff</td>
<td>Veterinary Medicine &amp; Biomedical Sciences</td>
<td>MSL - Medical Sciences Library</td>
</tr>
<tr>
<td>9</td>
<td><a href="mailto:pikasper@hko.tamu.edu">pikasper@hko.tamu.edu</a></td>
<td>Faculty</td>
<td>Education &amp; Human Development</td>
<td>Sterling C. Evans Library</td>
</tr>
<tr>
<td>10</td>
<td><a href="mailto:monkey_ch428@tamu.edu">monkey_ch428@tamu.edu</a></td>
<td>Undergraduate</td>
<td>Science</td>
<td>Sterling C. Evans Library</td>
</tr>
<tr>
<td>11</td>
<td><a href="mailto:rachellejones96@yahoo.com">rachellejones96@yahoo.com</a></td>
<td>Undergraduate</td>
<td>Liberal Arts</td>
<td>WCL - West Campus Library</td>
</tr>
<tr>
<td>12</td>
<td><a href="mailto:mindblade@tamu.edu">mindblade@tamu.edu</a></td>
<td>Undergraduate</td>
<td>Dwight Lock College of Engineering</td>
<td>Annex - Library Annex</td>
</tr>
<tr>
<td>13</td>
<td><a href="mailto:bitaylor@tamu.edu">bitaylor@tamu.edu</a></td>
<td>Graduate</td>
<td>Education &amp; Human Development</td>
<td>Sterling C. Evans Library</td>
</tr>
<tr>
<td>14</td>
<td><a href="mailto:heath_stempell@tamu.edu">heath_stempell@tamu.edu</a></td>
<td>Undergraduate</td>
<td>Agriculture &amp; Life Sciences</td>
<td>WCL - West Campus Library</td>
</tr>
<tr>
<td>15</td>
<td><a href="mailto:aggie_13@tamu.edu">aggie_13@tamu.edu</a></td>
<td>Undergraduate</td>
<td>General Studies</td>
<td>WCL - West Campus Library</td>
</tr>
<tr>
<td>16</td>
<td><a href="mailto:jdhithers@tamu.edu">jdhithers@tamu.edu</a></td>
<td>Faculty</td>
<td>Liberal Arts</td>
<td>Sterling C. Evans Library</td>
</tr>
<tr>
<td>17</td>
<td><a href="mailto:jillheath@tamu.edu">jillheath@tamu.edu</a></td>
<td>Graduate</td>
<td>Education &amp; Human Development</td>
<td>Sterling C. Evans Library</td>
</tr>
</tbody>
</table>
Manage Your Survey:  
Stage 4 - Post Hoc & Evaluation Questionnaires

<table>
<thead>
<tr>
<th>Post Hoc Questionnaire</th>
<th>Evaluation Questionnaire</th>
</tr>
</thead>
</table>
| • Information about your survey  
  - Sample size  
  - # of e-mails sent  
  - # of invalid e-mail addresses  
  - Incentives offered  
  - Marketing techniques  
  - Etc.  | • Feedback about your LibQUAL+® experience  
  • All survey liaisons and assistants are encouraged to complete this questionnaire |
Survey Results

• Survey Results Notebook (PDF)
  – Individual & Group Analyses

• Comments
  – About half of users provide comments
  – Download Excel file from Stage 4 or Data Repository

• Excel/SPSS data files

• Additional Services:
  – Customized Discipline Analysis
  – Library Branch Analysis
  – User Subgroup Analysis
  – Other customized analyses (upon request)
  – Print Copies
General Discussion and Q&A
Summary and Closure
LibQUAL+® Resources

- LibQUAL+® Lite
- News
- Events and Training
- Publications
- LibQUAL+® Procedures Manual

www.libqual.org
Library Assessment Conference
Building Effective, Sustainable, Practical Assessment
Charlottesville, Virginia

COMING FALL 2012
The LibQUAL+® Team

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