LibQUAL+® Survey Administration

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Introduction to LibQUAL+ Webinar
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www.libqual.org
Objectives

• Prepare for the Survey Implementation
• Determine the pros and cons of sampling
• Identify marketing opportunities and email sources
• Configure, preview and launch your survey
• Distribute your survey to your customers
• Close your survey
• Complete the Representativeness, Post-hoc and Evaluation Questionnaires
• Retrieve your survey results
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

• Not all institutions need to obtain permission

• 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, postgraduates, academic staff, and staff

• 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

• Discussion list
  LIBQUAL-L@listserv.tamu.edu
  LIBQUAL-UK@JISCMAIL.AC.UK
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, halls
- More suggestions and example works are available on Publications Page
Survey Process
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 mutual agreement.
- To view and set user permissions for your survey run (available Jan. 2011), visit the Management Center. Here you can set a user’s role in administering your LibQUAL+ service.
- To configure and launch your survey (available Jan. 2010), visit the survey administration area.

www.libqual.org
LibQUAL+® Management Center: Getting Started

- Login (Required to use the Management Center)
- Center Sections:
  - Register for Surveys
  - Register for a Subscription
  - Manage Users
  - Manage Your Survey
  - Survey Results
  - Resources
  - Directory

Survey Dashboard
Welcome to LibQUAL+®!
Download the new 2010 Procedures Manual

www.libqual.org
Survey Process: Manage Your Survey

Eight Sections:
- Customization
- Preview
- Representativeness
- Monitor Survey Progress
- Incentive Winners
- Post Hoc
- Evaluation
Manage Your Survey: 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.
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]
Manage Your Survey: 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:"

<table>
<thead>
<tr>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>English (British)</td>
</tr>
<tr>
<td>1.</td>
</tr>
</tbody>
</table>

Add New Option

Save
Manage Your Survey: Customization – Customized Disciplines

• Tailor your disciplines to suit your institution

• Map them back to the standard disciplines to aid benchmarking

• Results notebooks summarize findings by user group and provide a chart for both standard and custom disciplines
Manage Your Survey: Customization - Disciplines

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 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>English (British)</th>
<th>Reporting Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Agriculture &amp; Related</td>
<td>Agriculture &amp; Related Subjects</td>
</tr>
<tr>
<td>2. Architecture, Building &amp; Planning</td>
<td>Architecture, Building, &amp; Planning</td>
</tr>
<tr>
<td>3. Biological Sciences</td>
<td>Biological Sciences</td>
</tr>
<tr>
<td>4. Business &amp; Administration</td>
<td>Business &amp; Administrative Studies</td>
</tr>
<tr>
<td>5. Combined Studies</td>
<td>Combined Studies</td>
</tr>
<tr>
<td>6. Computer Science</td>
<td>Computer Science</td>
</tr>
<tr>
<td>7. Creative Arts &amp; Design</td>
<td>Creative Arts &amp; Design</td>
</tr>
<tr>
<td>8. Education</td>
<td>Education</td>
</tr>
<tr>
<td>9. Engineering &amp; Technic</td>
<td>Engineering &amp; Technology</td>
</tr>
<tr>
<td>10. Humanities</td>
<td>Humanities</td>
</tr>
<tr>
<td>11. Languages</td>
<td>Languages</td>
</tr>
<tr>
<td>12. Law</td>
<td>Law</td>
</tr>
<tr>
<td>13. Librarianship &amp; Informatics</td>
<td>Librarianship &amp; Information Science</td>
</tr>
<tr>
<td>14. Mathematical Sciences</td>
<td>Mathematical Sciences</td>
</tr>
<tr>
<td>15. Medicine &amp; Dentistry</td>
<td>Medicine &amp; Dentistry</td>
</tr>
<tr>
<td>16. Other</td>
<td>Other</td>
</tr>
<tr>
<td>17. Physical Sciences</td>
<td>Physical Sciences</td>
</tr>
<tr>
<td>18. Social, Economic, &amp; Pol</td>
<td>Social, Economic, &amp; Political Studies</td>
</tr>
<tr>
<td>19. Subjects allied to Medic</td>
<td>Subjects allied to Medicine</td>
</tr>
<tr>
<td>20. Veterinary Science</td>
<td>Veterinary Science</td>
</tr>
</tbody>
</table>

See how this question will appear on the survey in English (British)
<table>
<thead>
<tr>
<th>Disciplines</th>
</tr>
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<tbody>
<tr>
<td>Agriculture and Related Subjects</td>
</tr>
<tr>
<td>Architecture, Building &amp; Planning</td>
</tr>
<tr>
<td>Biological Sciences</td>
</tr>
<tr>
<td>Business</td>
</tr>
<tr>
<td>Business &amp; Administrative Studies</td>
</tr>
<tr>
<td>Combined Studies</td>
</tr>
<tr>
<td>Computer Science</td>
</tr>
<tr>
<td>Creative Art &amp; Design</td>
</tr>
<tr>
<td>Education</td>
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<tr>
<td>Engineering &amp; Technology</td>
</tr>
<tr>
<td>Humanities</td>
</tr>
<tr>
<td>Languages</td>
</tr>
<tr>
<td>Law</td>
</tr>
<tr>
<td>Librarianship &amp; Information Science</td>
</tr>
<tr>
<td>Mathematical Science</td>
</tr>
<tr>
<td>Medicine &amp; Dentistry</td>
</tr>
<tr>
<td>Other</td>
</tr>
<tr>
<td>Physical Sciences</td>
</tr>
<tr>
<td>Social, Economic, &amp; Political Studies</td>
</tr>
<tr>
<td>Subjects allied to Medicine</td>
</tr>
<tr>
<td>Veterinary Science</td>
</tr>
</tbody>
</table>
Example

- Agriculture and Related Subjects
- Architecture, Building & Planning
- Biological Sciences
- Business = Business & Management
- Business & Administrative Studies
- Combined Studies
- Computer Science
- Creative Art & Design
- Education
- Engineering & Technology
- Humanities
- Languages
- Law
- Librarianship & Information Science
- Mathematical Science = Maths
- Medicine & Dentistry = Health
- Other
- Physical Sciences
- Social, Economic, & Political Studies
- Subjects allied to Medicine
- Veterinary Science

Aerospace Engineering
Civil Engineering
Electrical Engineering
Mechanical Engineering
Example – Customized List

- Business & Management
- Combined Studies
- Computer Science
- Aerospace Engineering
- Civil Engineering
- Electrical Engineering
- Mechanical Engineering
- Maths
- Health
- Other
Manage Your Survey: Customization – Customized Disciplines

![Customization interface](image)

**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 alphabetical order. Be careful to enter new terms exactly as you wish 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>Options</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Aerospace Engineering</td>
<td></td>
</tr>
<tr>
<td>Agriculture &amp; Related Subjects</td>
<td></td>
</tr>
<tr>
<td>Air Transport</td>
<td></td>
</tr>
<tr>
<td>Automotive &amp; Motorsport</td>
<td></td>
</tr>
<tr>
<td>Business &amp; Administrative Studies</td>
<td></td>
</tr>
<tr>
<td>Chemistry &amp; Chemical Engineering</td>
<td></td>
</tr>
<tr>
<td>Civil Engineering</td>
<td></td>
</tr>
<tr>
<td>Computer Science</td>
<td></td>
</tr>
<tr>
<td>Creative Design</td>
<td></td>
</tr>
<tr>
<td>Defence &amp; Security</td>
<td></td>
</tr>
<tr>
<td>Electrical Engineering</td>
<td></td>
</tr>
<tr>
<td>Environment &amp; Water</td>
<td></td>
</tr>
<tr>
<td>Forensic Science</td>
<td></td>
</tr>
<tr>
<td>Human Factors (Aerospace Engineering)</td>
<td></td>
</tr>
<tr>
<td>Innovation &amp; Design</td>
<td></td>
</tr>
<tr>
<td>Logistic &amp; Supply Chain</td>
<td></td>
</tr>
<tr>
<td>Manufacturing</td>
<td></td>
</tr>
<tr>
<td>Mechanical Engineering</td>
<td></td>
</tr>
<tr>
<td>Medicine &amp; Health</td>
<td></td>
</tr>
<tr>
<td>Mathematics &amp; Operations</td>
<td></td>
</tr>
<tr>
<td>Mechanical Engineering</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
</tr>
</tbody>
</table>

See how this question will appear on the survey:

Discipline: Aerospace Engineering
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: Customization – Disciplines – Consideration

• Need to provide representativeness data for your customised disciplines
• Too many choices present challenges to users, difficult to navigate on screen
• Recommend no more than 16 disciplines, if possible
• Consider respondents who may not be subject-specific
• Focus on Library collection or teaching programme?
Approving and Running Your Survey
Manage Your Survey: Previewing and Launching Your Survey

B. Preview Your Survey

The preview of your LibQUAL+® survey below is in the long version, even if you chose 100% Lite-view percentage. This step allows you to ensure that your survey, and every question, 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. The box to the right of each preview will turn green when it has been completed.

[English (British) Preview Survey](#) [Incomplete]

Below is how your survey would look in Lite. It is not required that you complete this preview survey. Even if you will choose 100% Lite-view percentage, you must complete the preview(s) above.

[English (British) Lite Preview Survey](#)

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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.

[Launch](#)
## Manage Your Survey: Previewing and Launching Your Survey

### 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

### Launched
- Can no longer make changes
- Live survey URL
Manage Your Survey: Distributing Your Survey

• Once you have your URL you can create your marketing materials
• Send out invitations via email to complete the survey
• Can be done in your own time
• Recommend you run Library staff training before your invitations go out if possible
  – Ideal way to capture Library Staff views
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
Reviewer Comments

• About one-half of users include comments on their survey
• Download via the Monitor Survey Progress page (Excel file or text file)
• Addictive
• Exercise caution
Representativeness Questionnaire

• Determines how your institutional profile compares to your survey data
• Requires the following information:
  – Number of individuals per user group
  – Number of individuals within each discipline
  – Number 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
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
  – Number of e-mails sent
  – Number 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
Summary and Closure
Additional Services

- LibQUAL+® Analytics
- LibQUAL+® Membership Subscription
  - Full Data Repository Access
  - Additional Analytics Modules
- Additional Notebooks
- Print Copies
- Additional Analysis
  - Customized Discipline Analysis
  - Library Branch Analysis
  - Other Customized Analyses (upon request)
LibQUAL+® Resources

- LibQUAL+® Web site
- LibQUAL+® Lite
- Publications
- Events and Training
- LibQUAL+® Procedures Manual

www.libqual.org
The LibQUAL+® Team

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