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Findings about our Library Surveys: Universities of Louisville and Kentucky's User Surveys

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Introduction

Academic libraries survey their employees and users for a variety of reasons, and there are several commercial survey products available on the market to assist with these efforts. Standardized survey instruments such as those created by the Association for Research Libraries (ARL) include LibQUAL+® [1] and ClimateQUAL® [2], the Association of College and Research Libraries' (ACRL) Project Outcome for Academic Libraries [3], the numerous Ithaka S+R surveys [4], and others are widely used in academic libraries and offer many advantages such as robust development and testing protocols, and the potential to compare data with other institutions who use these instruments. However, many libraries prefer to develop their own instruments for a variety of reasons, from cost to specificity of the desired institutional assessment. The authors are Assessment Librarians at two academic libraries in Kentucky and have used both types of surveys at their institutions. This paper will discuss the benefits and challenges presented by each type of survey, and will share considerations for academic libraries who are planning implement surveys for assessment purposes.

Institution and library profiles

The University of Kentucky (UK) and University of Louisville (UofL) are both public, Carnegie classified R1 [5] institutions, separated by about 75 miles in the eastern part of the United States.

UK is the state's flagship, land-grant institution enrolling approximately 30,000 FTE students, and employing 1,500 FTE faculty and 14,000 additional employees, located in Lexington, Kentucky [6]. The UK Libraries comprise eight libraries across one campus, including a Law Library and a Medical Center Library. Fifty-six librarians and approximately 100 additional employees are employed by the Libraries (2020 data submitted by University of Kentucky Libraries for the IPEDS-Academic Libraries survey).

UofL is the state's largest metropolitan institution, with 18,650 FTE students and 6,999 employees [7]. The University Libraries at UofL include six libraries across two campuses, with 118 FTE employees, of which 45 are librarians (2020 data submitted to Association of Research Librarians).

Purpose: Types of surveys

While there are endless reasons that academic libraries survey their employees and/or users, two common use cases are user satisfaction with library services and employee perceptions of the libraries' organizational climate. Academic libraries wish to know how well they are serving their users, and often rely on user feedback to comply with accreditation and funding guidelines as well as accomplishing institutional priorities. Organizational climate surveys are frequently implemented to identify concerns in management practices, equity, or diversity, and may be used to analyze perceptions of library employees versus the perceptions of employees in other units or departments at a given institution.

Surveys are only one of many assessment methods that academic libraries use to obtain feedback about their employees and/or users, and the answer to the question “what type of survey should we do?” may very well be “no survey at all.” Surveys will not be able to address every concern that a library may have, and may serve primarily as a jumping-off point for other types of assessment that explore a topic in more detail, such as focus groups or observational studies. At larger institutions like ours, students and employees often report survey fatigue, due to being surveyed repeatedly about a myriad of topics. This survey fatigue has only increased during the ongoing COVID-19 pandemic, and continues to be a concern for our assessment efforts.

Approach: Standardized instruments versus Locally-developed instruments

Standardized instruments

One primary benefit of implementing standardized survey instruments is the resources that have been devoted to their development. In addition to more rigorous development and testing of survey instruments (usually by staff with expertise in these areas), commercial instruments often come packaged with some level of results reporting and data analysis. Their consistent use of relatively well-developed and well-tested questions also typically allows for results comparison over time as well as the benchmarking of results with other libraries or institutions who utilize that instrument, including in the case of LibQUAL+®, benchmarking against other ARL libraries. This data analysis is less common for internal surveys of library employees such as ClimateQUAL®.

Standardized instruments typically do allow a small number of library-submitted questions, although this is often quite limited. Further, given the wider audience for standardized survey instruments, the topics that they cover may not be as granular or versatile as one may wish. Institutions do not have the ability to customize questions or their response types or options for items such as demographic data that may not align with institutional priorities, may not include current terminology, or may conflate equity-focused demographic concepts. Finally, there are often fees associated with implementing standardized surveys which may be prohibitive.

The University of Kentucky Libraries has recently implemented three standardized surveys. First, ARL’s LibQUAL+® instrument has been used many times at the Libraries since its inception in 2001, most recently in 2020. UK Libraries implements LibQUAL+® every four to five years. This is a survey that assesses library service quality as respondent perceptions of library collections and access to them (the construct of *Information Control*), library customer service (*Affect of Service* construct), and library spaces (*Library as Place*). Results of this survey are provided by ARL in terms of minimum, perceived, and desired scores and include significant analysis along with the full set of the institution’s raw data. Results are intended to be interpreted and expressed in terms of not meeting, meeting, or exceeding service adequacy: is the library perceived to be meeting or exceeding the minimum or desired expectations of a given user population on a given item. UK Libraries, like many of the ARL libraries that use LibQUAL+®, has historically scored highly on the *Affect of Service* and *Library as Place* items, with the most variation in scores across respondent user groups and time found within the construct of *Information Control*, or

user perceptions of the library collections and their access to them. In 2020, we did not have any items with negative service adequacy scores. The results from LibQUAL+® have consistently been used as part of our institutional accreditation process to demonstrate the adequacy of library resources, services, and facilities.

On the internal side, ARL's ClimateQUAL® survey instrument was implemented for the first time in 2020 to serve as a baseline for future implementations. We intend to run this survey approximately every four to five years as well. This survey is subtitled an "Organizational Climate and Diversity Assessment," which describes it well. According to the ClimateQUAL® website [2], this instrument "is an assessment of library employee perceptions concerning (a) their library's commitment to the principles of diversity; (b) organizational policies and procedures; and (c) employee attitudes." The null hypothesis for this instrument is that "healthy organizations have increasing levels of diversity among employees which fosters a climate/culture that supports diversity overall." The twenty-six concepts evaluated in ClimateQUAL® are divided between organizational climate measures such as distributive, procedural, interpersonal, and informational justice; authenticity in leadership; valuing diversity; innovation; teamwork; and psychological safety, to name just a few, as well as organizational attitude measures such as job satisfaction; organizational commitment; organizational withdrawal; and interpersonal- or task-conflict. The survey includes an extensive demographic section.

ClimateQUAL® baseline scores reported by UK Library employees in 2020 indicated concerns with implementing standardized procedures fairly or evenly across the organization, significant organizational withdrawal, and low perceptions of psychological safety and psychological empowerment in the workplace. Notably, UK Libraries scored high on the items "valuing diversity" and climate for diversity in terms of both demographic categories of race and sexual orientation. Unlike with LibQUAL+®, the full dataset is not returned to the participating libraries, instead, results are returned with preliminary analysis completed, comparing each of the items versus each demographic category, so results are quite lengthy, and in many cases, somewhat inscrutable.

The final standardized survey that UK Libraries uses is actually one of several standardized surveys the larger University deploys: the Willis Towers Watson Employee Engagement instrument, which is locally branded the UK@Work survey. The results have been presented to the Libraries by employee category (faculty versus staff) as well as by Library employees versus employees of other Colleges administered by the Provost. Results of the UK@Work survey have been used by the Libraries to monitor and implement strategies to improve the work/life balance of Library employees. Further, in 2020 we attempted to compare the ClimateQUAL® response data to the Library employees response data from the UK@Work survey.

Locally-developed instruments

Locally-developed surveys offer maximum flexibility and customization of survey questions. While it may be more difficult to benchmark results from locally-developed surveys against other institutions' results, they can be tailored to provide a more accurate measurement of institutional priorities or be customized for more specific assessments, and can offer just as much longitudinal data as standardized surveys in

cases where the locally-developed surveys have been in place for many years. Academic libraries may also elect to use survey instruments developed by their associated institutions in order to expand instrument reach, reduce overall survey volume, or compare their performance with that of other campus units. Developing quality surveys, however, is a time-intensive process and libraries may not have staff with the time and / or expertise to write and test survey questions and conduct data analysis (and even where libraries do have these staff resources available, they may wish to prioritize their efforts elsewhere).

The University of Louisville Libraries have been conducting a locally-developed Libraries Benchmark survey (usually) every other year since 2001. The Benchmark survey provides feedback from a sample of students and faculty on library spaces, services, and collections (similar to the focus areas of LibQUAL+®) and this data is used as part of our institutional accreditation process to demonstrate the adequacy of library resources. The libraries generally receive overall positive results on all quantitative metrics in the survey, but a number of free-text comment questions have traditionally provided extremely candid and helpful feedback that has shaped some major library initiatives including building projects and collections enhancements.

While this survey has evolved over time and underwent a major revision in 2021, there has been some consistency in content and structure for the entire lifespan of the survey, and the overall format has been relatively consistent since 2012. This consistency has allowed for longitudinal tracking of improvements on some very specific metrics that would not be available using standardized instruments. This survey is administered in partnership with UofL's Office of Institutional Effectiveness, and can be connected to our Peoplesoft Campus Information System, which reduces the need to ask demographic questions on the survey. However, this locally-developed survey does not allow for benchmarking against peer institutions, and the demographic information in Peoplesoft is not always as granular as we would like (i.e. category of "Two or More Races" but with no further detail, gender only reflects the respondent's legal gender).

The Benchmark survey provides valuable general feedback as well as insights about our larger libraries, however some of our libraries do not typically receive very many responses. Our Archives & Special Collections (ASC) in particular is not as well served by the Benchmark survey, as many of their users are not affiliated with the University (such as researchers from other institutions or local community members). We develop further customized surveys for these libraries as needed, but try to follow the same general structure of the Benchmark as well as utilizing some of the same questions for comparison to the larger data set.

UofL libraries also participate in two campus-wide surveys. The first is the S4 or Student Services Satisfaction Survey, a survey of satisfaction with all student services offices on campus. While the libraries are limited to only a few questions on this survey, this instrument does reach the full student body and allows us to ask different, student-focused questions than the Benchmark without the need for additional surveying of our students. All UofL employees participate in a campus-wide Climate survey developed by the Office of Institutional Effectiveness. This is a large, in-depth survey with two modules

that are delivered in alternating years, and it is again connected to the Campus Information System which allows for a breakdown of the data at the unit level, so that the libraries are able to view data for our employees only. The libraries have some specific organizational priorities that are not covered in this larger survey, and an internal climate survey is now in development, but the internal survey will be much shorter and more focused.

UK also implements a locally-developed library satisfaction survey, scheduled alternately to the LibQUAL+® implementations. We have decided to revise the survey for its next implementation in 2022, but the focus and content of the survey over the last thirty years has remained consistent, with the instrument partially mirroring the question design and overall constructs assessed by LibQUAL+®. The objective of this survey has been to assess the individual branches of our library system, their services, collections, resources, customer service, and facilities. Each library branch has been provided with results from respondents who frequently utilize their branch, as well as the perspectives of overall library users. We have also implemented several additional locally-developed assessments, including our bi-annual library website observational studies, which include surveys, which we use for continuous improvement of our libraries' websites.

Findings: Considerations for Survey Implementation

The following list, while not exhaustive, offers an overview of the types of considerations that may impact a library's decision when selecting a survey type (or vendor for standardized surveys).

- Resources:
 - *Funding availability for commercial products.* While there are some freely-available survey instruments through library professional organizations, many standardized survey instruments are costly. Pricing models vary, but may be based on either the survey population or overall institutional characteristics such as Carnegie classification.
 - *Institutional surveys.* Universities may have existing access to standardized surveys that the library can use at little or no cost. There may also be campus-wide surveys that the library can participate in without the need for an additional survey to be created.
 - *Staff time and expertise for survey development/analysis.* The price tag to implement a standardized survey is not the only cost that needs to be considered. Libraries without dedicated assessment staff may find that they simply do not have the time or expertise available to develop their own survey. Even libraries who do have dedicated assessment staff may choose to prioritize their time for other assessment activities.
- Library/Institution characteristics:
 - *Population Size.* Consider the audience you are hoping to reach with your survey - is it in the hundreds? Thousands? Tens of thousands? For very small libraries and institutions, standardized instruments may be excessive, and shorter instruments or other assessment methodologies may be a better choice, especially if anonymity is a concern. Very large institutions may wish to consider sampling only a portion of their employees and/or users if they feel a representative sample can be obtained.
 - *Population demographics.* Libraries and institutions serving unique or specialized populations or employing generally heterogeneous employees may not have their needs met by standardized surveys, or may not find comparison/benchmarking data from other libraries useful.
- Library/Institutional priorities:

- *Survey purpose.* What is the purpose of the survey? Libraries looking to support accreditation or funding requirements may find benchmarking or reviewing longitudinal data against peer institutions useful.
- *Scope of information needed.* Standardized surveys may not be granular enough. Alternatively, locally-developed survey instruments may not be rigorously developed or tested enough to encompass the majority of user experiences.
- *Data Continuity.* Libraries wishing to show improvements or progress towards institutional goals may choose to continue with legacy survey methods. Libraries considering a new type of survey should consider whether data can be mapped from legacy surveys.
- *Data Security/Privacy.* Particularly when collecting information about employees or library users that could be identifiable, some libraries/institutions may not be comfortable with this data being collected by a commercial vendor. Conversely, for a locally-developed survey, it is important to ensure that your library will have the capacity to ensure confidentiality of respondent data.
- Distribution methods:
 - *Format.* While electronic distribution of surveys has become the standard, some libraries may wish to offer alternate options such as physical survey instruments.
 - *Survey platform.* Standardized survey instruments are often delivered through their vendors' proprietary platforms. For locally-developed surveys, libraries should consider whether they have access to a survey platform that offers the functionality they desire. Free versions of popular platforms may not meet the needs of a larger survey or one soliciting sensitive information.
- Data analysis:
 - *Reports and analysis available.* Commercial vendors typically provide some level of results reporting with varying levels of analysis. Depending on the platform used, locally-developed surveys may also provide some basic reporting, but often will require more analysis by library personnel.
 - *Access to raw data files.* Developing a survey locally will always offer access to complete data files, although many commercial vendors will also provide libraries with their raw data. Is additional analysis of raw data likely to occur?

Conclusions

The University of Kentucky and University of Louisville libraries have discovered insights about our library employees and library users through implementing both standardized and locally-developed surveys, although we have not used every available standardized survey instrument. There is no one-size-fits-all solution for survey implementation, and libraries should weigh the benefits and challenges of both standardized and locally-developed options to suit their specific needs, including availability of resources, institutional or library characteristics, institutional or library objectives of implementing a survey instrument, the method of distribution of the instrument as well as access to the survey data.

Notes

[1] LibQUAL+®: <https://www.libqual.org/home>

[2] ClimateQUAL®: (<https://www.climatequal.org/home>

[3] Project Outcome for Academic Libraries: <https://www.projectoutcome.org/>

[4] Ithaka S+R: <https://sr.ithaka.org/>

[5] Carnegie Classification of Institutions of Higher Education®:

https://carnegieclassifications.iu.edu/classification_descriptions/basic.php

[6] University of Kentucky, Institutional Research, Analytics, and Decision Support, Interactive Fact Book,

Quick Facts: <https://www.uky.edu/irads/quick-facts>, data from fall 2019

[7] University of Louisville, Profile, Facts & Figures: <https://louisville.edu/about/profile>, data from fall 2020