

Assessment Activity Reports

**Information Question Logging Project
November 2006**

The Information Logging Project was conducted from September 11-24, 2006 throughout all public service points in the University of Alberta Libraries system: reference and circulation desks, roving reference, satellite reference, and reference staff offices. Questions were summarized and logged by staff, noting unit library and service point, question format (in-person, instant messaging, email, and phone), and approximate time taken to answer the question.

The key objective of the pilot was to:

- Help inform additions and edits to the web FAQ
- Help identify policies and procedures that users find problematic

Report Recommendations Summary:

1. Identified Policy and procedure issues be addressed by relevant Library committees (Appendix A)
2. LOG should address issue of whether there should be consistency in equipment available in all libraries (e.g. colour printer, scanner, headphones)
3. Individual libraries should review spreadsheet of logged questions for library specific issues

DATA COLLECTION

The timing of the reference question logging was planned for the first two weeks of classes, assuming that questions during this time period would tend to focus on the information needs of students and faculty during the first week of classes (for example, directional questions that could be addressed with better signage, or questions that could be incorporated into the online library FAQ).

Over the period, a total of 7,014 questions were logged from the various service points. It should be noted that one circulation service point mistakenly began the question logging a week into the data collection period; however, the questions received by this service point totaled just over 1% of all questions received, which would not significantly affect the final dataset.

The Assessment Librarian categorized all questions using a slight variation of the KKAR Classification Scheme, utilized by Rutgers (See Appendix B) to code and organize the questions for analysis. Categories used were Directional, Ready Reference, Research, Policy and Procedural, Inappropriate, No Question, and Holdings; the Subject Search category was collapsed into the Research category.

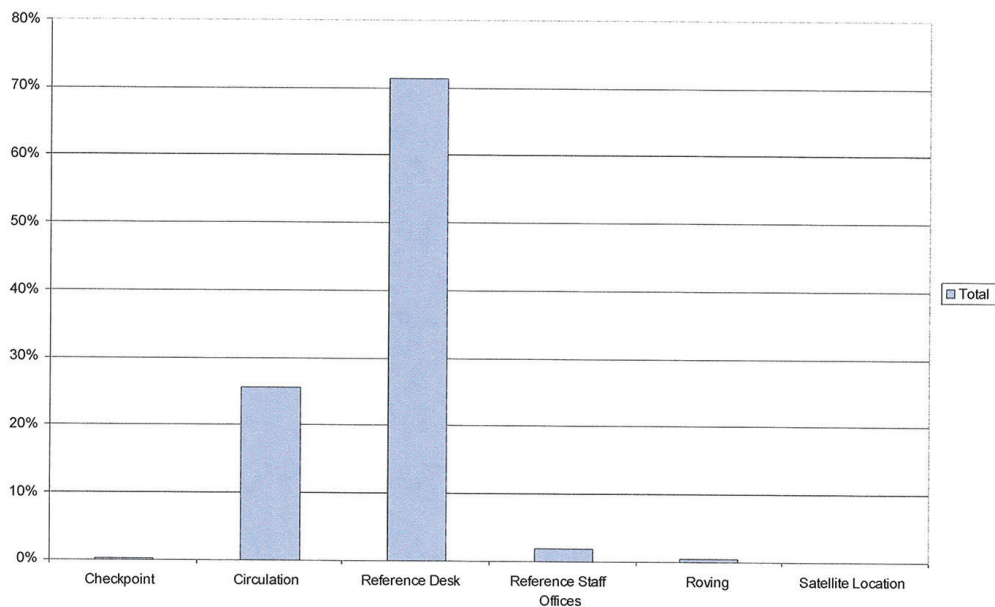
DATA ANALYSIS

This analysis has a system-wide focus, looking at results that are generalizable across the University of Alberta Libraries. The categorized coded spreadsheet of questions has been distributed to individual unit libraries to enable them to address local issues.

Where/How Were Questions Asked?

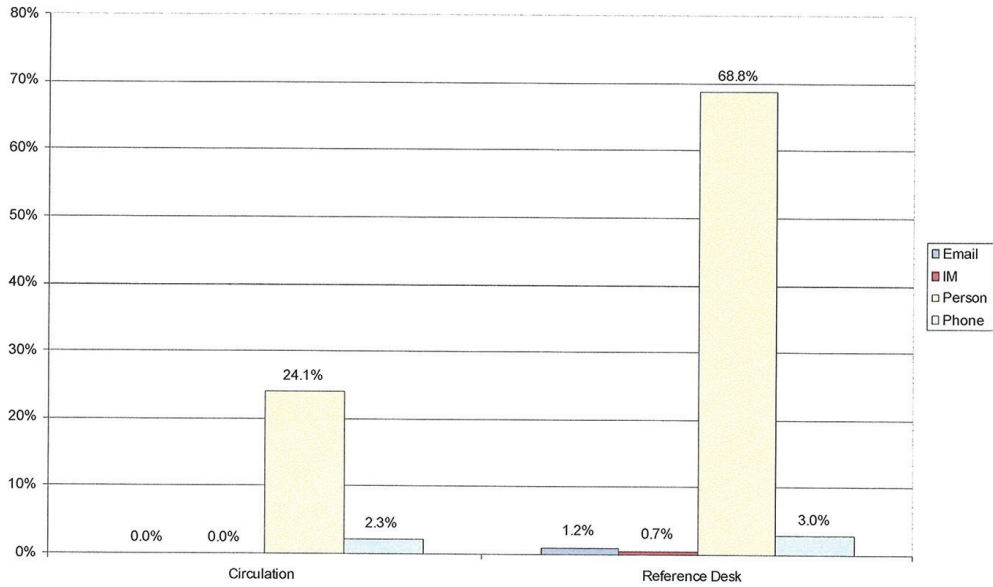
The majority of the questions received were received at reference and circulation desks, as seen in Fig. 1 below.

Fig. 1: Questions by Service Point (Percentage of All Questions; All Libraries; n=7,014)



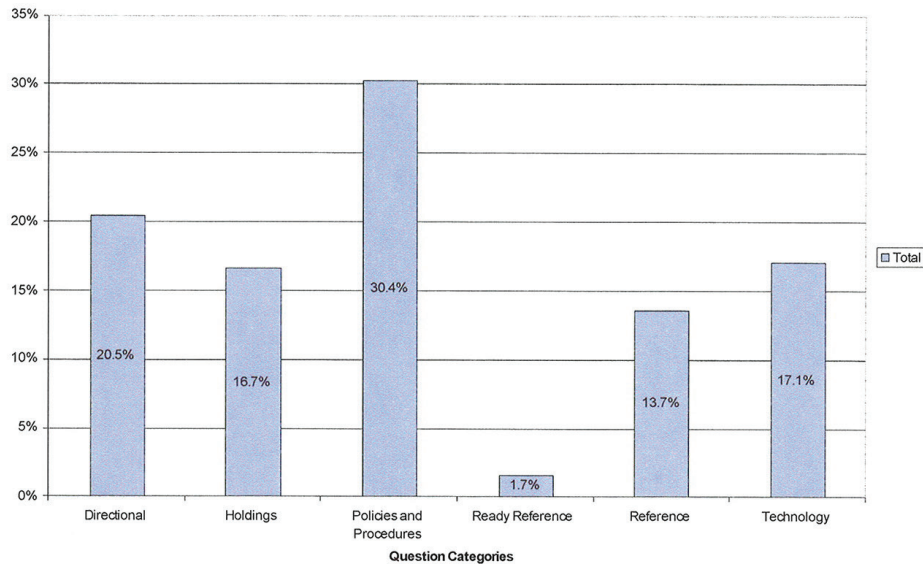
Further, questions during the collection period were most likely to be asked in-person than through phone, email, or instant messaging formats. Fig. 2 shows the question format for the two key service points, reference and circulation desks. Circulation desks did not receive questions in either email or instant messaging format at all during this time; it is assumed that later in the term, circulation desks would have received many more questions. Only reference desks received questions via email or instant messaging. Interestingly, in DeGroot's study of health science library reference questions during the academic term (collected during the month of November 2003), the majority of questions also tended to be asked in person (2005).

Fig. 2: Questions Asked by Format at Circulation and Reference Desks
(Percentage of Total Questions; n=6,824)



The majority of questions asked at all service points were in the Policies and Procedures category (30.4%), followed by Directional questions (20.5%), Technology questions (17.1%), and Holdings (16.7%). Reference and Ready Reference questions were 13.7% and 1.7% of the total questions asked, respectively. De Groote notes that past studies of reference questions have resulted in directional questions composing between 30-35% of all questions asked at the reference desk (2005). Again, timing of data collection is likely a factor here.

Fig. 3A: Categories of Questions Asked, All Service Points (n=6,974)



Looking more closely at the types of questions received by these two main types of service points, we see that reference desks received more questions in every category (fig. not shown). Questions categorized as Policies / Procedures and Directional were most frequently asked at both types of service points.

Policy/Procedure Questions

Users questioned and /or sought clarification on a number of policies and procedures. Most policy and procedure issues were related to:

- Circulation policies/rules
- Request service
- Fines
- Library privileges
- Onecard
- Availability of equipment/technology
- Facilities

Appendix A identifies these issues. It is recommended that these issues be reviewed by the relevant Library committee. In addition, in response to numerous information requests on copyright, a copyright FAQ is currently being developed with Cindy Paul.

There is considerable variability of equipment available amongst the libraries. (e.g. colour printer, scanner, headphones, DVD burner). This is an issue that should be addressed by LOG.

Directional Questions:

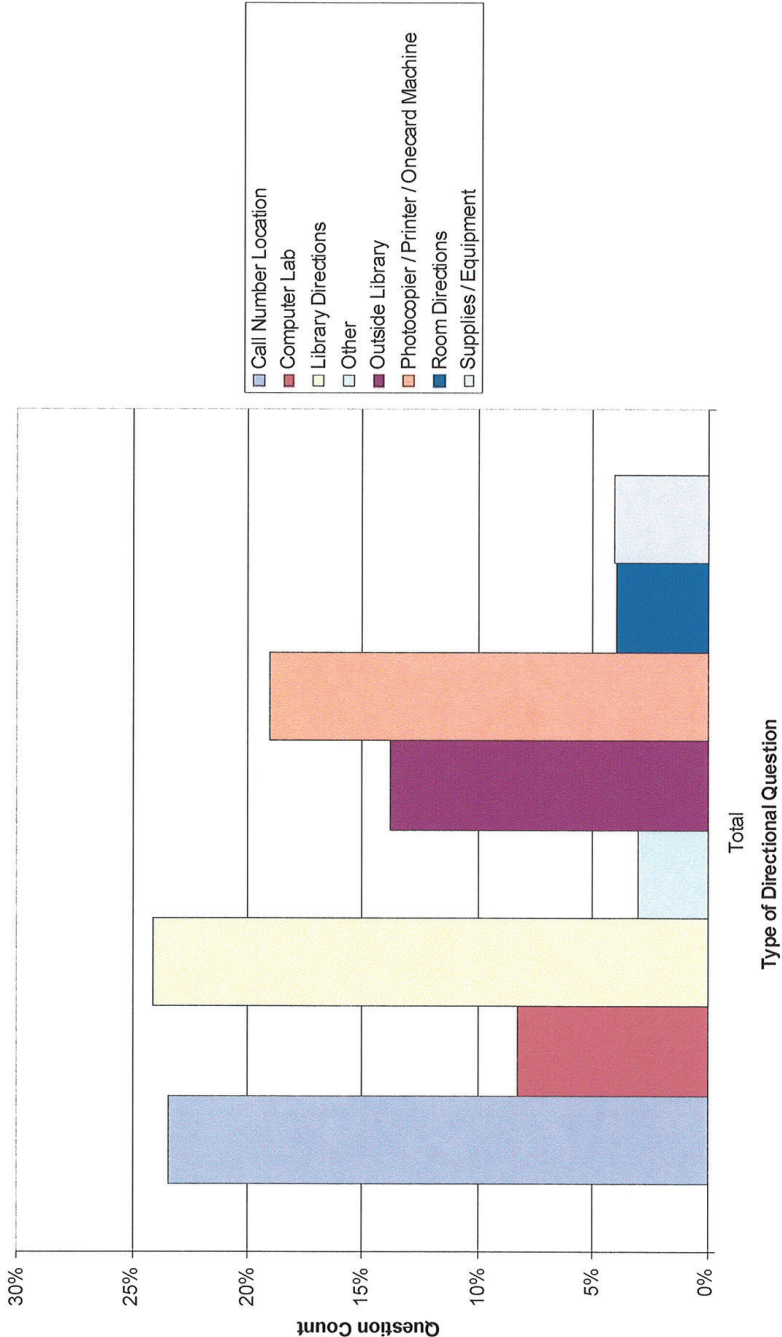
A more specific categorization and analysis was undertaken for directional questions. Directional subcategories included:

- Call Number
- Circulation Desk
- Computer Labs (including questions about other PAC stations)
- Library Directions (including other campus libraries, directions to specific floors, study space, and directions to course sign-up sheets, staff, book return, supplies / equipment, etc.)
- Other (change for copying, where to make a phone call, etc.)
- Outside Library (non-library destinations on campus or in the city)
- Printer / Photocopier / Onecard Machine
- Room (specific numbered rooms)

The Reference Services Team's Working Group on Web Content has reviewed all of the directional questions and added information and Library maps to the Libraries FAQ.

The above sub-categorization demonstrates a very specific focus, with one result being that proportionally few questions were asked in most of the categories. Fig. 5 shows the complete count of these sub-questions for all library units.

Fig. 5: Type of Directional Questions, All Libraries (n=1,381)



The top 5 types of directional questions were analyzed by unit libraries (both large units and medium / small).

Figures 6A and 6B, and 7A and 7B look at total directional questions asked at the large unit libraries and the medium / small unit libraries, respectively. Directional questions were most likely to be asked at the Education and Sci/Tech libraries. The Health Sciences library was least likely of all large units to be asked these questions; therefore, other unit libraries may look at the Health Sciences library signage to see specifics of placement, contrast, and other visibility factors for the different types of directional questions asked.

Fig. 6A: Total Directional Questions by Large Unit Library (n=4,973)

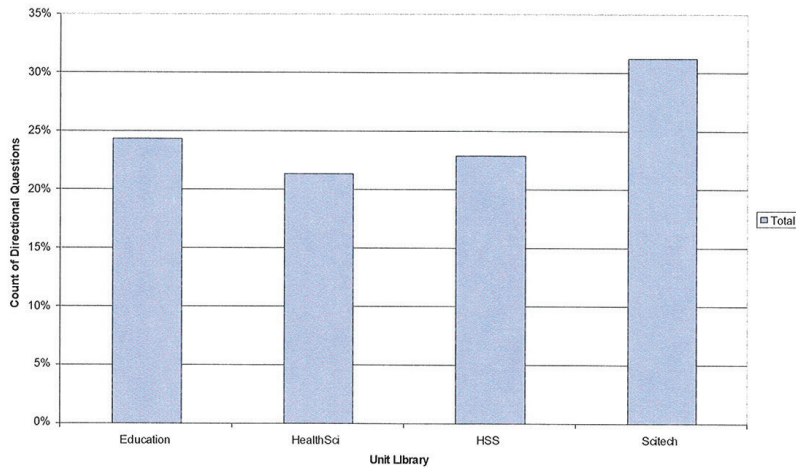
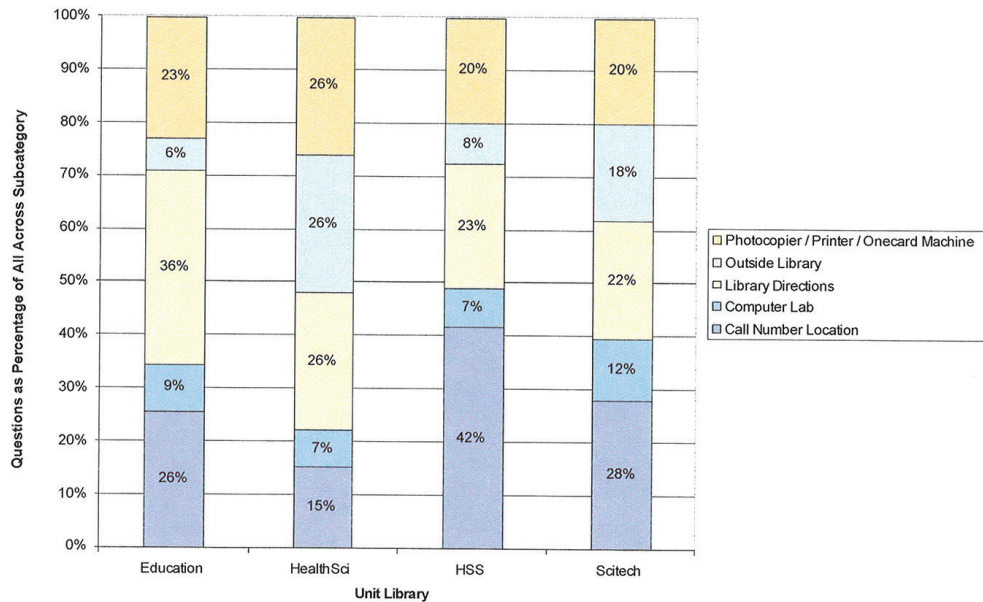


Fig. 6B: Types of Directional Questions by Large Unit Library



Regarding the medium / small unit library analysis, it should be noted that those libraries that received fewer than 10 directional questions were not included for analysis (Music, Math, Special Collections, and Data). As these libraries each have a specific focus of their collections or activity, they may be more “end destinations” and therefore less likely to receive directional questions.

The directional questions received by these libraries tended to focus on sites outside the library. Second most-frequently asked were questions asking about printing / photocopying or Onecard machines.

That the Knowledge Common (KC) was more likely to receive questions on the location of a computer lab likely speaks to the high demand for computers in this location.

Fig. 7A: Directional Questions by Medium / Small Unit Library (n=2,041)

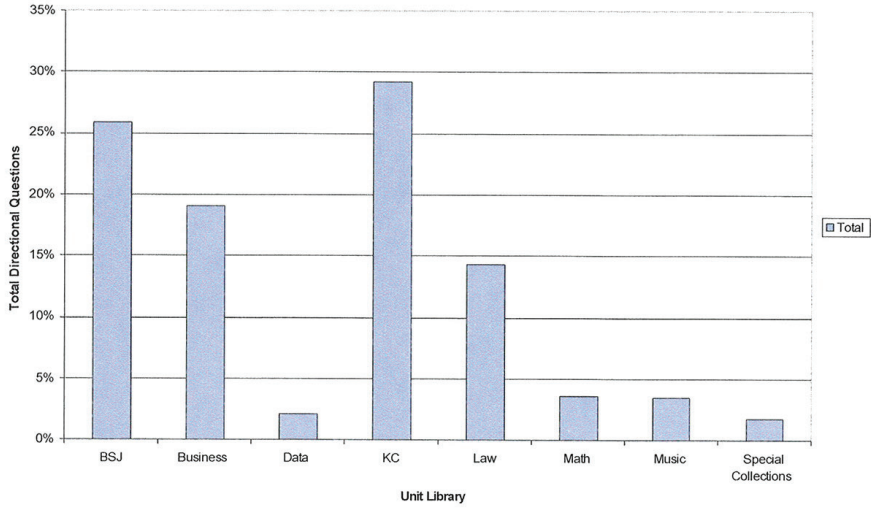
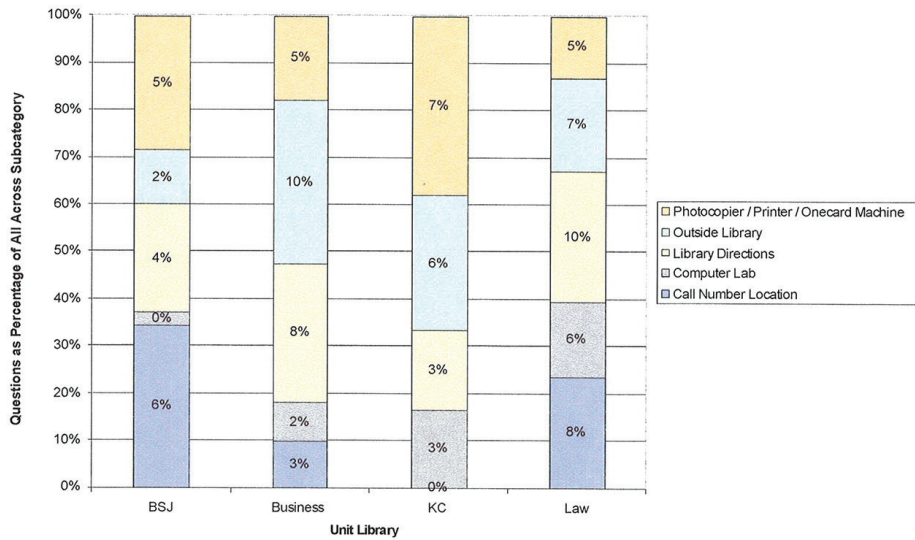


Fig. 7B: Types of Directional Questions by Medium Unit Library (n=212)

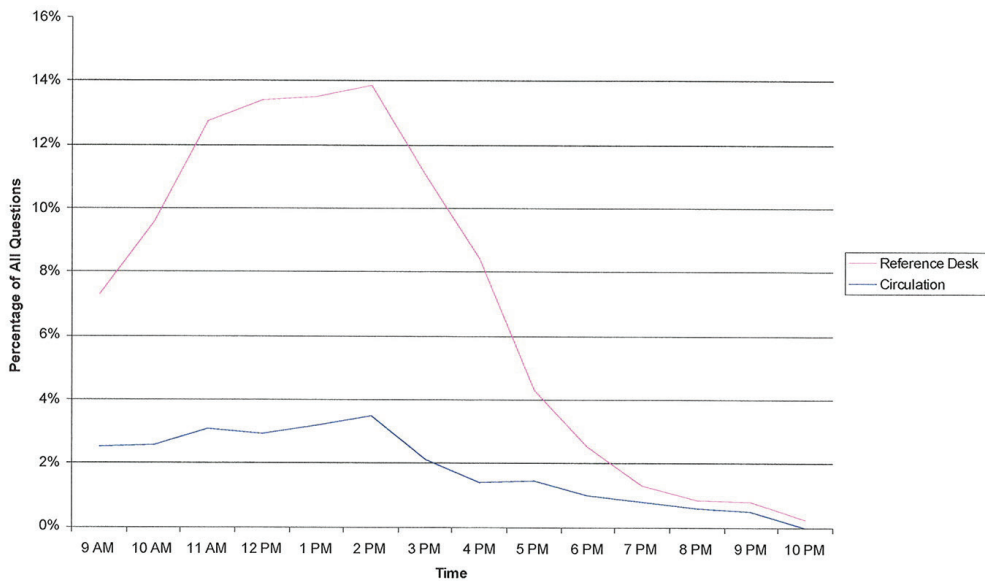


Other Thoughts/Observations:

Staffing Implications

While a single data collection during the first weeks of classes would not provide adequate information for staffing decisions, we can look at hourly questions received by the circulation and reference desks to see peak busy periods. For this time period, reference desks received the most questions between 12-3pm. Circulation desk questions were highest from 9am through 3pm, although these service points experienced much less of a spike than the reference desks.

Fig. 8: Questions Asked During Service Hours at Circulation and Reference Desks (n=6,737)



Thoughts on Data Gathering Methodology:

Regular statistics collection could be employed to fulfill the following additional purposes:

- Help understand the range of reference questions across the system
- Help inform reference training based on questions asked
- Provide general information to support staffing decisions (in conjunction with other data collection tools, such as Director's Station)

Some adjustments could be made to staff instructions, such as:

- Staff should note the specific question content, rather than using summary terms such as "directional"
- As well, there are instances where several questions were logged once, with notes on the number of times the question had been received (e.g., "5 x how to put money on Onecard"). For future collection purposes, it would be most effective to have staff ensure that each question was logged in separately, or to have the questions separated out during the categorization by the Assessment Librarian.

Any decisions made on the data collection timing and frequency should take into consideration the research questions to be answered, as well as the needs for facilitating staff participation and consistency of question logging.



Memo

To: Allyson Washburn, Web Working Group Chair
Scott Eldredge, Digital Imaging Manger

From: Brian Roberts, Process Improvement Specialist

Date: 11/10/2006

Re: Online Collections at BYU Survey Results

INTRODUCTION

To assess patrons' experience in using the utility developed through CONTENTdm to manage and display digital materials, a link to an online survey was placed on the home page of the Online Collections at BYU site, which serves as the gateway to BYU's digital library. Patrons that came to the Online Collections at BYU were invited to participate. This survey was intended to be part of an overall effort to assess the digital library at BYU, in terms of how it is named, how it is presented, and its functionality. Other studies are in process and reports will be done to summarize their findings. This memo summarizes the analysis and results of the Online Collections at BYU survey only.

EXECUTIVE SUMMARY

The most striking thing to come from the survey was that those who responded were primarily coming to the Online Collections at BYU to view the Family History Archives (over 70%), which is explained by the status of those coming to the site, many being genealogists, family history researchers, or associated with the Family History Library or a local family history center. A majority of respondents visited the site more than once, although a good 36% of respondents were experiencing their first trip to the Online Collections at BYU. Interestingly, repeat visitors were more inclined to visit collections other than the Family History Archive than were first time visitors, implying over time they have become more familiar with what the digital library has to offer. First time users were generally less satisfied with their visit than repeat visitors, did not find the information as useful as repeaters, and rated it more difficult to find what they were looking for. Again, the obvious implication from this is over time, patrons became accustomed to the utility and tended to be satisfied with its functionality and their ability to locate materials. And as expected, if a respondent was satisfied with the visit, they found what they were looking for and thought the process was easy. If they were not satisfied, they were not able to find the wanted information and found the process difficult. Respondents also commented that they liked its accessibility and the availability of the collections, and though they wanted to see more collections, many felt improvements could be made to the search capability and functionality of the utility.

STUDY SPECIFICS & RESULTS

Over the course of several weeks, the survey to assess patrons' perceptions of their experience in Online Collections at BYU, the digital library of the Lee Library and Perry Special Collections, was made available to any and all who wished to participate as they visited the site and saw the survey link. In all nearly 450 patrons took the survey which yielded interesting results. Those that responded came

from a wide range of possible respondents. Most came to the site via a DSL or Cable Internet connection, with 45 of the 50 states represented (most coming from either Utah or California). Most of the Canadian provinces were represented as were 8 foreign countries. And when queried as to their status, the vast majority indicated they were not from an academic setting. The majority indicated they were either a genealogist, family history researcher or associated with the Family History Library or a local family history center of the LDS Church. A summary of the demographics taken for this survey can be found in the set of charts below.

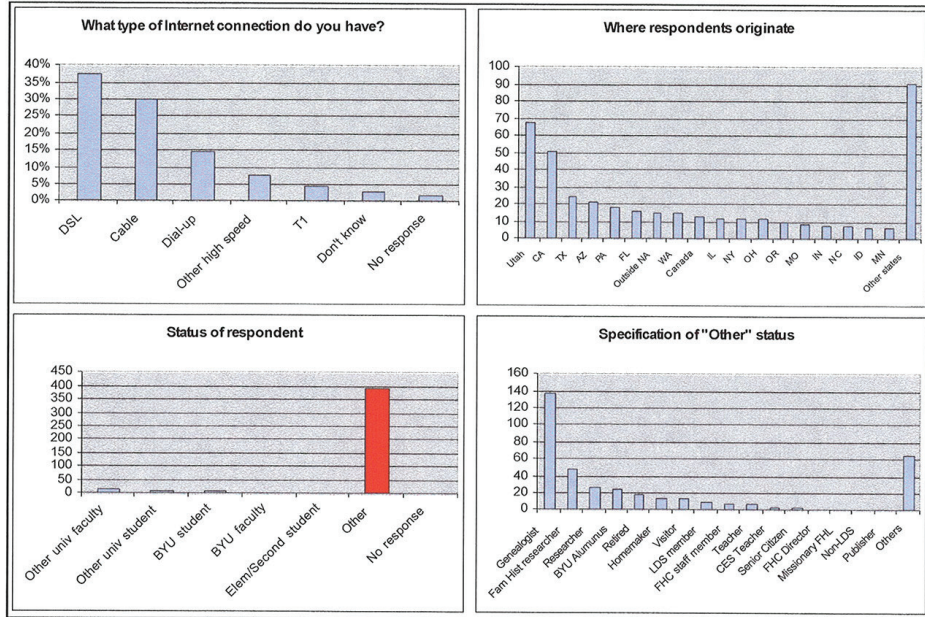


Figure 1 - Demographics of respondents

Though a majority of respondents said they had made multiple visits to the Online Collections at BYU (Daily, Weekly, Monthly or a few times a year), many indicated that this was their first time to the site (well over one-third). In addition, though many of the respondents indicated that they had discovered it through a friend's recommendation, a link from another site, a search engine, a link from the library catalog, or a newspaper article, most indicated some other means. These included mailing lists, family history centers, Rootsweb (a genealogical tool of Ancestry.com), genealogy newsletters, the Lee Library's home page, other genealogy periodicals, or through the Family History Library or LDS Church websites.

Based on those responses it was no surprise to see that the collection used most regularly was the Family History Archive. Over 70% of the respondents indicated that they came to the Online Collections at BYU to use that archive. But it was interesting to note how that was broken down by first time visitors and repeat visitors. It became very apparent that repeat visitors visited more of the various collections contained in the digital library than did the first timers, implying that over time users would become familiar with what Online Collections at BYU contained and would use the many collections available. This information has been summarized in the chart below.

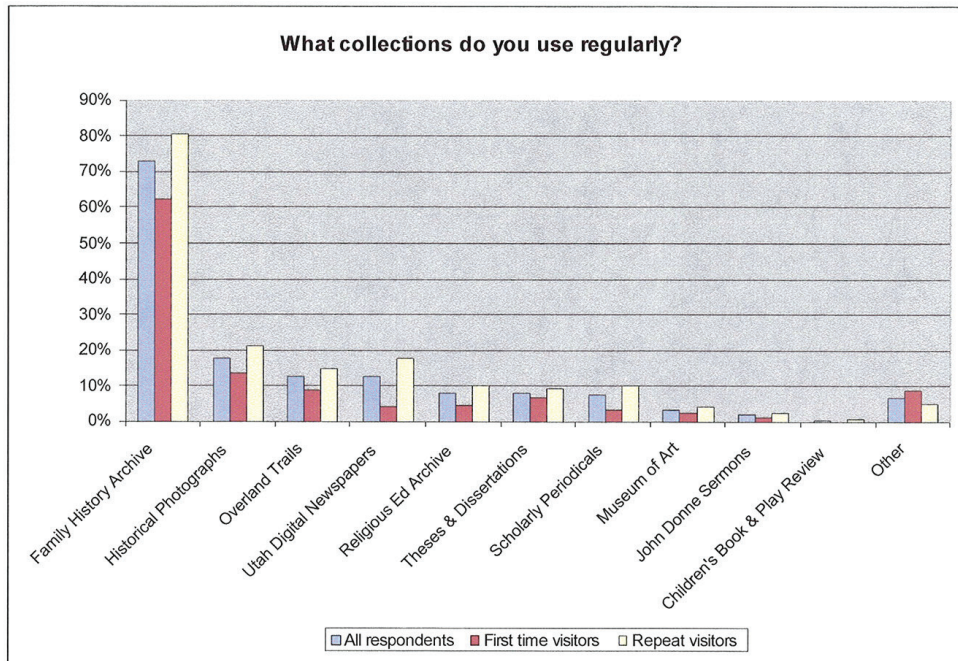
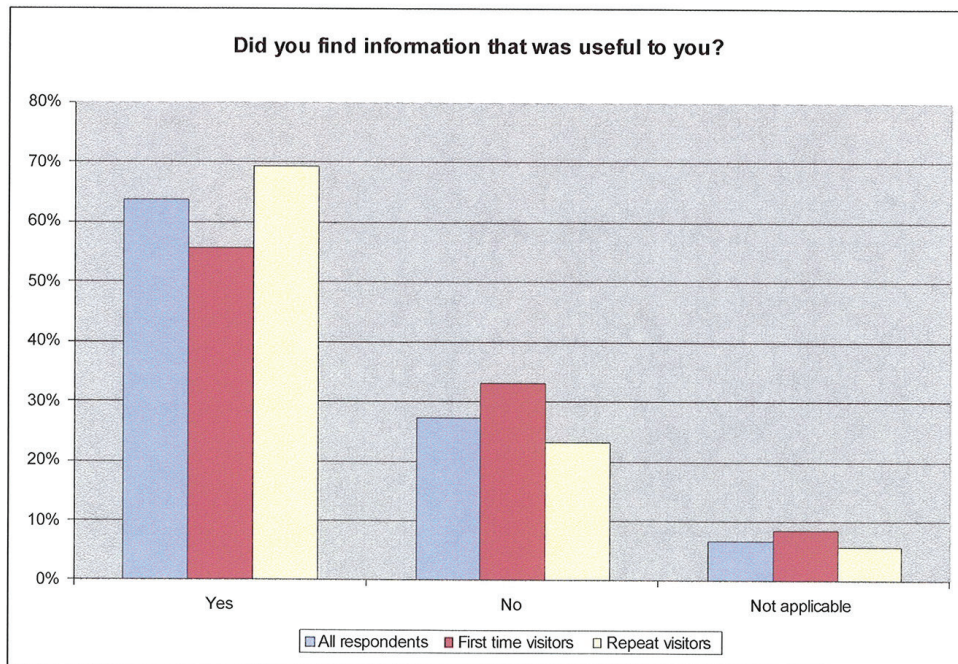
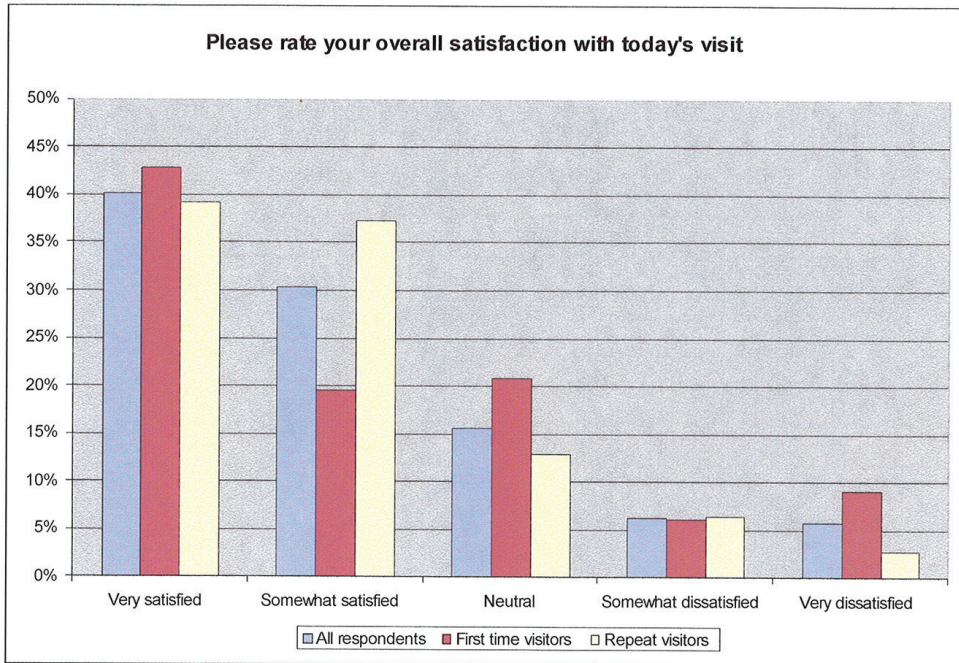


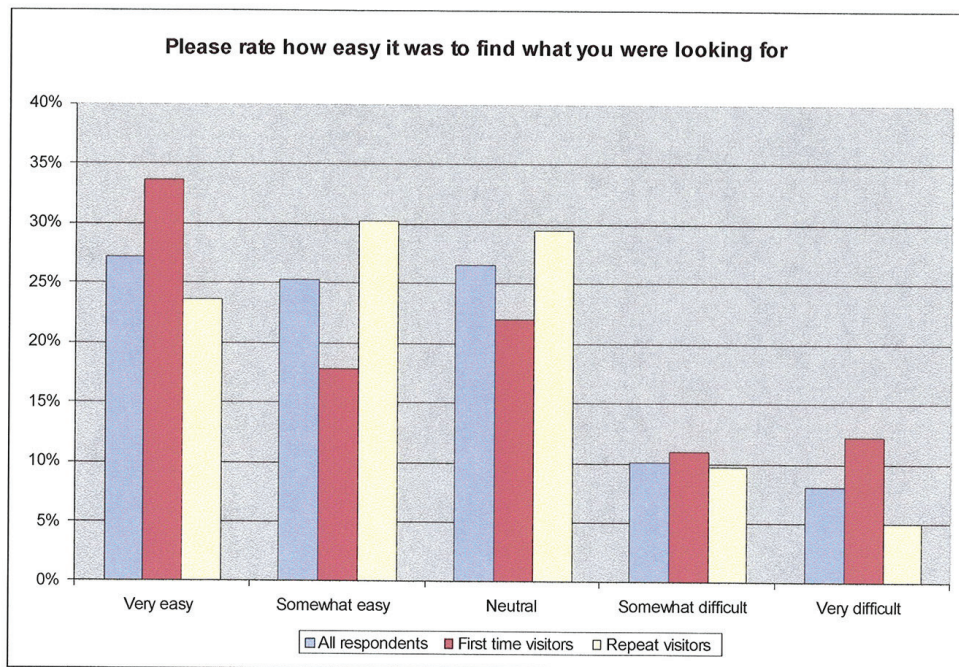
Figure 2 - Collections used regularly by visitors to the Online Collections at BYU

It was also interesting to note that nearly 60% of those that responded used only one collection in the digital library and of that, 84% used the Family History Archive. It is quite apparent that that collection appears to be the most valued among those frequenting the Online Collections at BYU.

When questioned about their overall satisfaction with their visit, the vast majority were satisfied (over 70%). However, again there was an interesting disparity in this between first timers and repeaters. Those that were experiencing their first trip to the Online Collections at BYU tended to be much more neutral or dissatisfied with their visit than were repeaters. This carried over into whether the information found was useful to them. First time visitors were less inclined to think so than were repeaters. First time visitors were also much harder on the utility than were repeaters when rating the ease in finding objects on the site. However, it should be pointed out that in all three instances, the majority of respondents, whether they were first time visitors or repeaters were satisfied with their visit, found the information useful and rated the utility easy in finding what they had come to search for. As stated earlier, the obvious implication from what these three questions are suggesting is that those that come to the site regularly can use it with ease, find what they are looking for, and in the end are satisfied with their experience. All three questions have been summarized and can be found in the charts below.

One final item to note, as cross comparisons in these three questions were made, one thing became quite obvious, if they were satisfied with their visit, then they had found what they were looking for to be useful and using the utility was easy. If they were not satisfied with their visit, they did not find the information useful and it was difficult to use. This should come as no surprise.





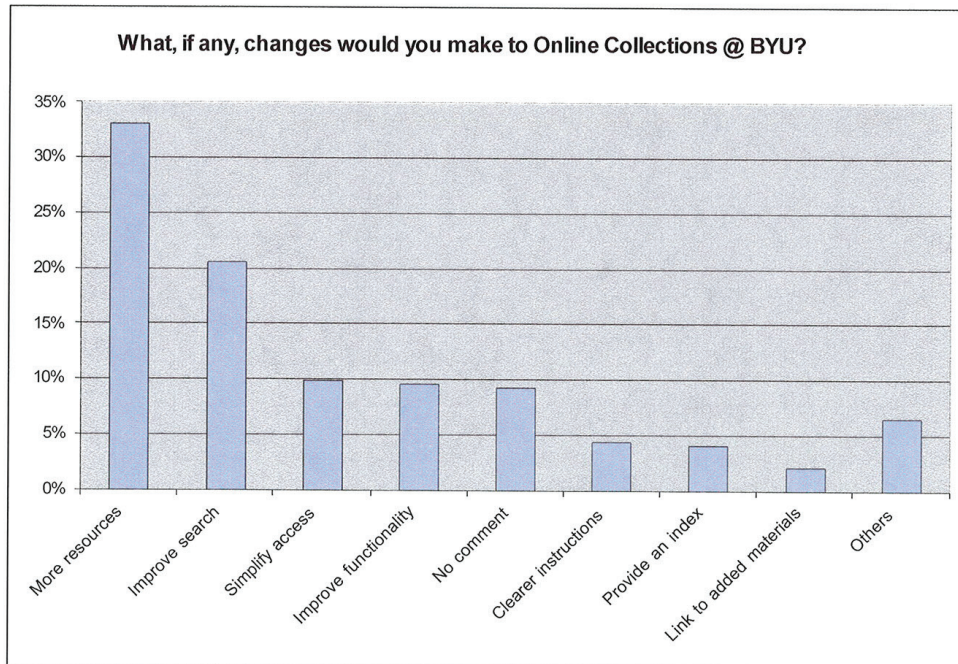
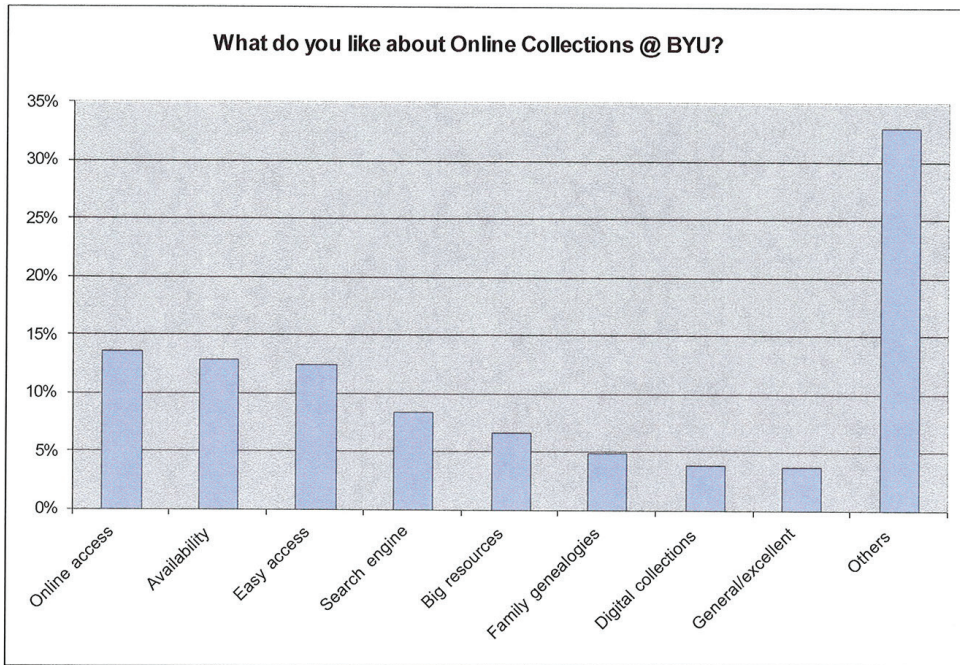
COMMENT DATA

Two additional questions were included at the end of the survey to elicit comments from respondents. In one they were asked what they liked about Online Collections at BYU, while the other asked what changes, if any, they would make to Online Collections at BYU. A total of 328 included comments to the first question, while 298 responded to the second (267 responded to both).

Overall, when asked what they liked about Online Collections at BYU, the responses were many and varied and most were quite positive. Respondents indicated they liked the online access, the availability of the collections, and the easy access to them. Others liked the search capability of the interface, enjoyed the vast amount of resources or thought the site was excellent. Any negative comment relative to this question tended to focus on the need of more materials in the collection (Mormon pioneer diaries or additional online books, for example). But they were few compared to the positive responses, which would be expected given the tenor of the question itself.

When asked what changes, if any, would respondents make to Online Collections at BYU, most said they wanted more resources (more histories, more rare books, more images, etc.). One-third of those that commented indicated such. But just over 40% indicated that searching could be improved (provide more options and better layout of results), that access could be simplified (stuff too buried or navigation cumbersome, for example), of general functionality of the application could be improved (PDF's hard to manage, OCR incomplete, etc.). There were several that had no comment because of a lack of experience using the Online Collections at BYU or simply thought it was fine the way it was. A few also indicated that the site could use clearer instructions, would like to see an index, or wanted a link that would show them recently added materials.

Comments from both questions have been summarized in the charts below.

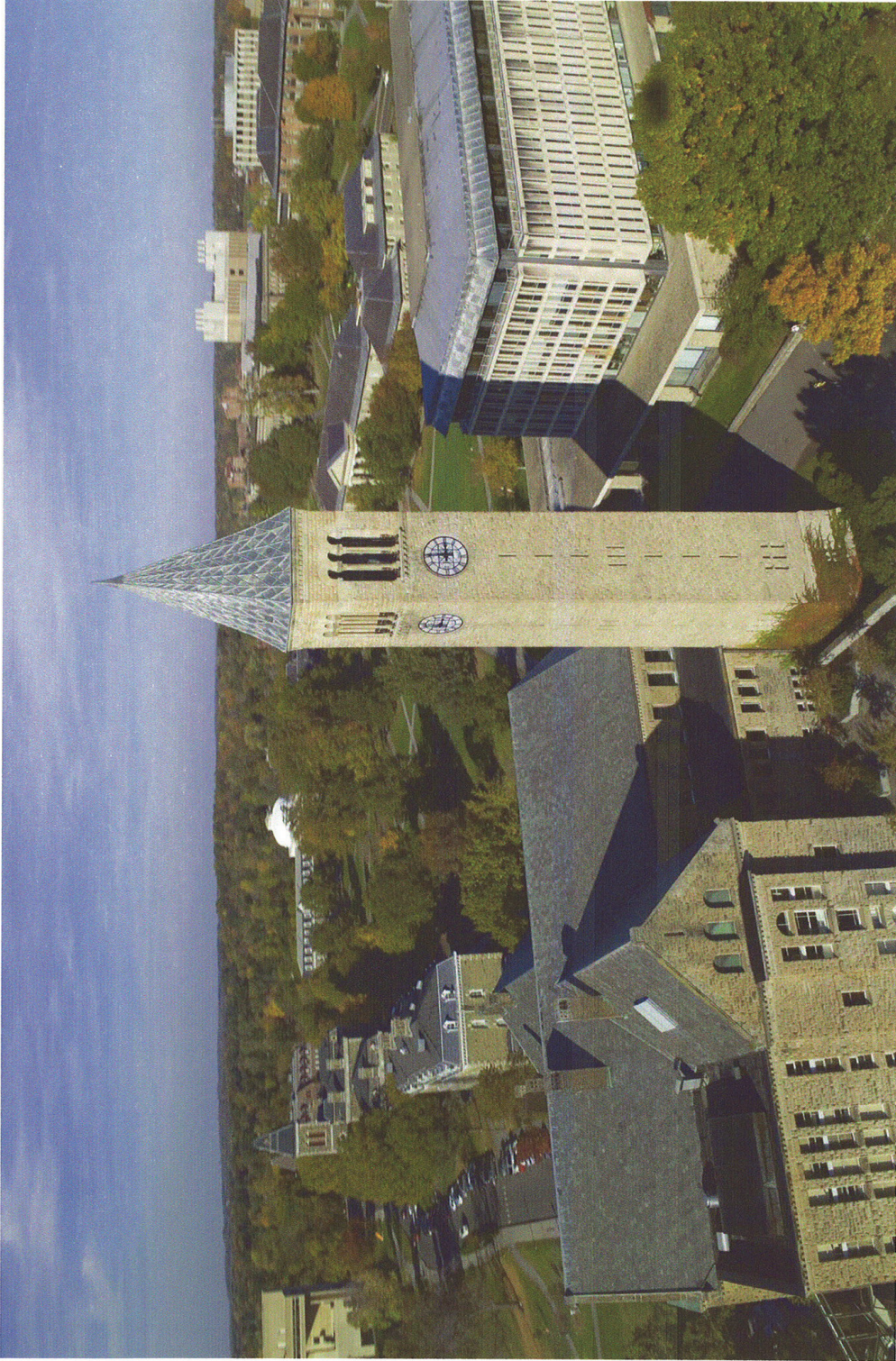


CONCLUSION

It is evident from the responses to the Online Collections at BYU survey that patrons like and use the service, particularly the Family History Archives. And though the users were varied in their backgrounds and from where they came, most tended to be genealogists or family history buffs, hence the heavy use of the Family History Archives. Overall, satisfaction of the utility tended to be high, although repeat users of the collections were more likely to be satisfied than first-time users, implying as familiarity increased with the site, so did their satisfaction level. And as expected, if they were satisfied with the site, they were more likely to have found what they were looking for and thought the utility easy to use.

And though there were many respondents that gave positive comments when asked what they liked about the site, most felt there could be steps made to improve the search capability of the utility, that efforts should be made to simplify access to the collections, and improvements were needed to the functionality of many aspects of the site.

It would seem that though the Online Collections at BYU is overall satisfying the needs of genealogists, family history buffs, and researchers with the content it contains, continued efforts should be made to continue to add content and make that content easier to access and use.



Cornell University
Library

Annual Statistics 2005/2006
Printed, summary version

Full version available in PDF at
www.library.cornell.edu/staffweb/AnnualStatsArchive/indexStatArch.html

CORNELL UNIVERSITY LIBRARY ANNUAL STATISTICS 2005/2006

The Cornell University Library's annual statistical report is prepared by the PSA Research & Assessment Unit.
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February 2007

CORNELL UNIVERSITY LIBRARY – ANNUAL STATISTICS 2005/2006

July 1, 2005 – June 30, 2006

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REPORT VERSIONS AND HIGHLIGHTS**Report versions available**

This report is available in 2 versions: this summary version and a full version. Both are available in PDF at <http://www.library.cornell.edu/staffweb/AnnualStatsArchive/indexStatArch.html>. The summary version includes the highlights, as well as the summary tables and graphs from the full version. Detailed figures and notes for individual units are available in the full version, which, for the first time, provides links to tables and graphs from its table of contents.

Collections

- The number of print volumes increased by 121,929 or 1.6% (full version Table 1a). This is the smallest number of gross volumes added in the last 15 years, in part reflecting rising costs and the shift to electronic formats.
- The number of physical serial subscriptions decreased by 1,916 or 3.1% (full version Table 3). This reflects, in large part, the effort underway to eliminate unnecessary and costly duplication of serials in physical and electronic formats. This is the fifth consecutive year the number of non-electronic subscriptions and commercial binds has decreased (Summary Graphs 1 & 5).
- At the same time, the number of e-journal holdings in the Library Catalog increased by 6,068 or 14.7% (full version Table 4).
- In the fall of 2005, the Library began a project to move close to 1 million volumes to the Library Annex. With the net addition of 374,178 volumes in 2006, the Library Annex holds over 2.2 million volumes or 28.6% of the Cornell Library's print collection (full version Table 1).
- The number of slides and filmstrips increased by 12,050 items or 30.4%, reflecting, in large part, a transfer of slides from University Photography to RMC.

Services/Usage

- The number of circulation transactions for library materials decreased by 1.5%, while the circulation of equipment purchased for patrons' use in the Library (ranging from laptops for use within the Library, to polling devices used by students in their classes) increased by 11.8% (Summary Table 2). The number of charges decreased by 2.9%, while renewals increased by 4.1%. Total circulation (of all collections and equipment) showed a 0.1% decrease.
- The volume of Interlibrary Loans (ILL) continued to increase this year. The lending showed a lower rate of increase (1.9%) than borrowing (7%) (Summary Table 2). Similar to last year, Borrow Direct, a service that allows patrons to directly initiate expedited requests after a combined search of the library catalogs of Brown, Columbia, Cornell, Dartmouth, University of Pennsylvania, Princeton and Yale accounted for 33.3% of filled lending and 44.9% of filled borrowing requests respectively (full version Table 8).
- Library-to-library delivery is a service that allows Cornell-affiliated patrons to request that a book be sent from one library to another for more convenient pickup. Jointly, the libraries that reported in 2005 saw a 33.1% increase in 2006 (full version Table 6a).

- The use of the Library's Enhanced Returns policy, implemented in 2001, which allows patrons to return items borrowed to any library, increased by 7.6%; 16.1% of total returns in 2006 were made at libraries other than the owning library (full version Table 5b).
- In October 2005, the Library launched a new service to deliver books to faculty members' departmental offices. The Library filled 1,280 such requests from October through June (full version Table 7).
- 17,139 people (or an average of over 100 people per night) used Uris Library between 2 and 8 a.m. during the academic year when Uris is open for study 24 hours, Sunday-Thursday (full version Table 16 footnote).
- The number of user instruction sessions offered and session participants were up 22.2% and 6.4% respectively (Summary Table 2).
- The use of the citation management software, Refworks, and the journal table of content delivery service, MyContents, are shown in Table 10. This year, users added 351,237 references (compared to 99,959 for half of 2005) to RefWorks through library databases interfaces as well as manually. The use of MyContents increased, but at a slower pace. At the end of 2006, 1,934 users (a 2.1% increase from 2005) received 10,340 tables of contents electronically from 959 journal titles.
- The use of the Library Gateway increased by 23.5% from last year: close to 9 million visits to the Library Gateway were tracked by Web analysis software (full version Table 9b).

We welcome your comments and questions about this report.

The Research and Assessment Unit

SIZE OF COLLECTIONS

SUMMARY TABLE A
SIZE OF COLLECTIONS OVER TIME
2000 - 2006

Item Count	2000	2001	2002	2003	2004	2005	2006	Total Growth (2005 - 2006)	Percent Change
	Incr/(Decr) Incr/(Decr)								
Printed Volumes & Non-Book Materials (Tables 1 & 2a)									
Printed Volumes	6,830,411	6,975,415 ¹	7,139,192 ¹	7,316,826 ¹	7,477,388 ¹	7,586,799 ¹	7,708,728	121,929	1.6%
Maps	237,066	239,526	241,553	244,556	246,881	249,000	250,050	1,050	0.4%
Motion Pictures	3,932	4,039	4,044	4,157	4,360 ¹	4,360	4,419	59	1.4%
Filmstrips and Slides	40,370	40,981	43,362	40,251	37,027 ¹	39,627	51,677	12,050	30.4% ²
Video Tapes and DVDs	14,623	15,052	18,530 ¹	20,372	22,343	23,709 ¹	26,335	2,626	11.1%
Sound Recordings	90,015	90,395	104,515	105,643	112,005	113,901	115,765	1,864	1.6%
Computer Files	9,070	9,569	11,484	12,819	15,213 ¹	16,510	17,871	1,361	8.2%
Microforms (Tables 2b)									
Microfilm	196,622	199,732	204,396	207,715	210,775	214,883 ¹	217,526	2,643	1.2%
Microfiche	6,264,099	6,413,284	6,557,254	6,596,881	6,706,087	6,829,128 ¹	6,905,399	76,271	1.1%
Microcards	139,494	139,456	139,456	139,456	169,484 ¹	169,484	169,484	0	0.0%
Microprints	1,048,409	1,048,409	1,048,409	1,048,409	1,048,409	1,048,409	1,048,409	0	0.0%
Archival & manuscript materials (in cu. ft.) ³	64,509	65,131 ¹	65,839	67,020	68,299	69,565	70,271	706	1.0%
Physical Serial Subscriptions (Table 3)									
Physical Newspaper Subscriptions (Table 3)	492	492	479	374	345	368	370	2	0.5%
Networked Electronic Resources (Table 4)									
Full-text journals	3,321	5,347	19,616	20,241	25,159	41,237 ¹	47,305	6,068	14.7%
Other	1,304	3,965	21,272	87,651	121,345	333,999	347,169	13,170	3.9%

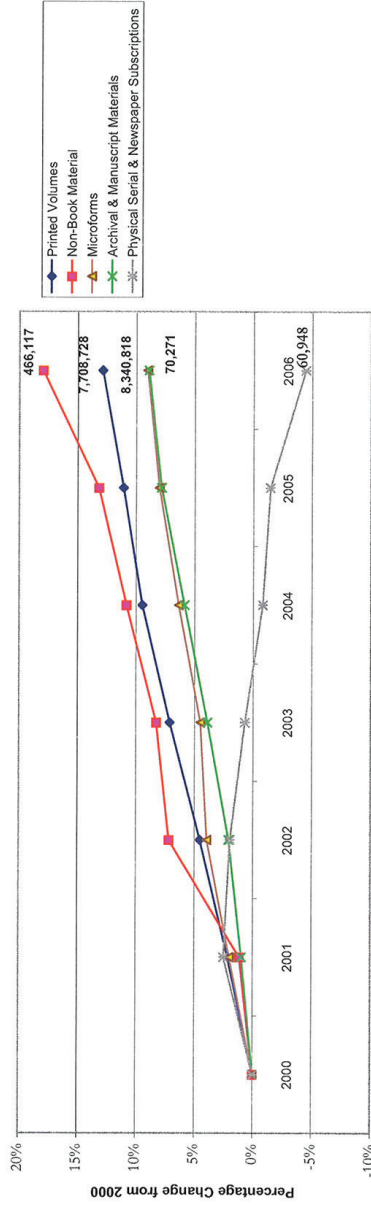
Notes:

- ¹ Corrected/adjusted count.
- ² Increase reflects in large part the transfer of slides from University Photography.
- ³ Figures for the Medical Archives are in linear feet.
- ⁴ Does not include resources exclusive to the Medical College.

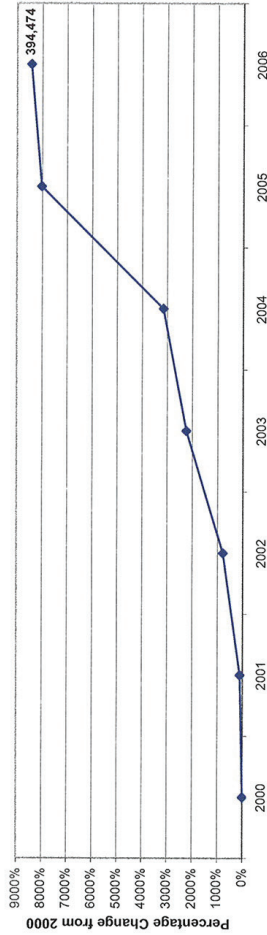
SIZE OF COLLECTIONS

SUMMARY GRAPHS 1-2

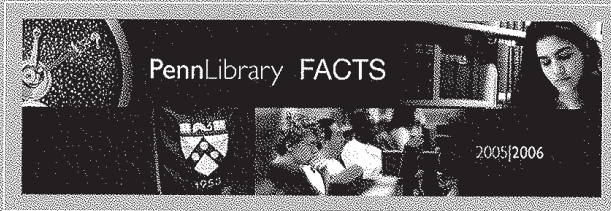
PRINTED VOLUMES, NON-BOOK, MICROFORM, MANUSCRIPT AND PRINT SERIAL SUBSCRIPTION TRENDS, 2000-2006

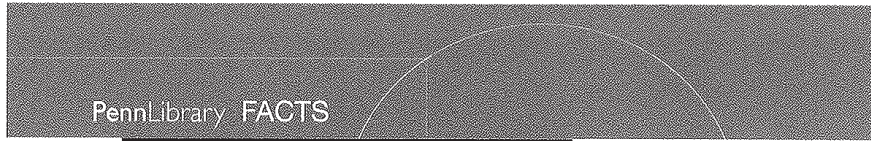


NETWORKED ELECTRONIC RESOURCE TRENDS, 2000-2006



University of Pennsylvania Library





2005 | 2006

The data in this publication describe the development and use of Penn Library resources from July 1, 2005 through June 30, 2006



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Access this publication online through the Penn Library Data Farm at <http://metrics.library.upenn.edu/prototype/datafarm>. For information about Library measurement, contact Joe Zucca, Management Information Services and Communication, 215-573-4643/zucca@pobox.upenn.edu

Executive Summary

LibQual survey scores for 2006 show steady progress over the past three years in satisfaction ratings of USC Libraries among students and faculty. 2006 scores were higher in every dimension (affect of service, information control, and library as place), and were consistently higher in nearly every subcategory. Along with the core survey questions, scores were also higher in every instance for the supplemental questions relating to general satisfaction (such as "service quality" and "how I am treated") and information literacy outcomes (such as "helps me stay abreast in my field", and "aids my academic advancement").

The representation for 2006 maintained the pattern of past surveys, where Liberal Arts and Sciences are somewhat overrepresented, and where Viterbi and Marshall are underrepresented. As such, data may not be completely applicable to the Business Library or the Science & Engineering Interdisciplinary Center. Both Marshall and Viterbi did respond, but not in proportion to their size. The highest response came from social sciences departments within the College. Among user groups, graduate students responded more than faculty or undergraduates. Since undergraduates typically score the library higher than other user groups, the overall score would be expected to drop for this year. The higher overall scores for this year, therefore, demonstrate a significant improvement over the past three years.

In comparing USC's 748 survey responses to the 99,155 responses from other academic libraries within the Association for Research Libraries, USC scores fall slightly below the perceived mean in all three dimensions. In the Information Control and Library as Place dimensions, however, USC's desired expectation was higher than the ARL mean. Higher expectations from the USC community on issues within these areas could partly explain the lower scores.

This year's survey shows no change in the past 3 years in the trend of library use. Students and faculty prefer to obtain information online, yet at the same time the data demonstrates a continuing interest in library spaces. Qualitative data shows a high demand for both group and individual study spaces, as well as comfortable spaces with stable wireless access.

Finally, although service quality scores have improved, some service issues still exist. Users expect highly skilled and knowledgeable library personnel who are eager to meet their needs. Better online system usability and online help is also a frequent request. Based on the scores and the comments, however, the most important issue for users is the collection. The lowest scores appear in the categories of "print and/or electronic journals I require for my work" (Information Control question 8), and "printed library materials I need for my work" (Information Control question 5). Overall, 2006 data supports a need to increase collection development and outreach efforts, while continuing to improve service quality through training, and continuing to creatively redesign library spaces.

Next Steps

Scores and comments will be reviewed by the Leadership Team with an eye toward the FY08 budget. Key issues with budget implications will be targeted and addressed. In addition, all library teams, centers, and departments will review LibQual quantitative data along with the qualitative data (reported separately) and discuss library and university-wide implications. Upon review, team leaders, center directors, and library managers are expected to develop action plans for quick wins within their respective areas. Suggestions for policy or process changes, or remedies with multi-year budget implications, will be forwarded to the Leadership Team for approval before being implemented.

USC Libraries

2006 LibQual Report

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Report on Benchmarking Process

January-May 1999

Benchmarking is an ongoing, systematic process for measuring and comparing the work processes of one organization to those of others that exhibit functional "best practices." The goal is to provide an external standard for measuring the quality and cost of internal processes, and to help identify where there may be opportunities for improvement. To be effective, benchmarking should be integrated into operations throughout the organization and should be an ongoing process that analyzes data collected over time. It is a learning process that helps institutions discover how they can best improve the services, direct or indirect, that they offer to their customers.

The Charge

For the 1998/2000 biennium, the University of Virginia Library chose as one of its goals (6f) to institute benchmarking as a tool for the analysis of internal processes and to establish benchmarks against which the Library can measure those processes. The Library's first Benchmarking Team was created in January 1999. The Team was charged with two challenges: to create a benchmarking process for the Library; and to carry out a short-term benchmarking project as a pilot (for which there is a separate Shelving Report). The benchmarking portion of the charge included:

". . . The Team is charged with learning the benchmarking process and applying it to a specific project. The intent is

<http://www.lib.virginia.edu/mis/benchmarking/bench-ProcessRept.html>

that the members of this Team become the Library's core staff with knowledge of benchmarking. After learning the process, the Team members should be able to:

- assist other groups with their benchmarking projects
- assist in developing benchmarking expertise among other staff members, for example, by participating in a training program

Each May the membership of the Team will be reviewed. Those who want to remain on the Team will be joined by new members so that the Benchmarking Team can be a constantly renewed central group of experts in the process. New projects will be determined at the same time that membership is reviewed." (see [Appendix 1](#) for full charge.)

The benchmarking pilot project was chosen by User Services and Central Services Councils after review and discussion of the results of several user satisfaction surveys conducted in the spring of 1998. It was decided that our reshelving process was limited enough for the Team to use as a pilot for learning the process.

Team Members

Team members were chosen by Management Information Services staff and Kendon Stubbs, and were selected in part from members who had similar experience on other process improvement teams. It was also important to have representation from several departments and service units affected by the project. Two Team members were from Management Information Services to provide statistical skills and continuity for the benchmarking process. The Team consisted of David Griles from Management Information Services, Doug Moseley from Cataloging, Heather Packard from Science/Engineering, Gary Treadway from Social Sciences Services, and Lynda White from Fine Arts/Management Information Services. Two Team members from stacks supervisory staff were added within a few weeks: Don McCracken, Stacks Supervisor in Alderman, and Pam Howie, Public Services Library Assistant in Music.

The Learning Curve

The Team began its task by identifying and reading books and articles on benchmarking in industry and the military. There is some literature on benchmarking specifically relating to libraries, but details on how to carry

out the process in libraries are generally lacking. In addition, it could not be determined that there is any training available locally through the University. No courses are taught through Organizational Development and Training, through the Commerce School, the Education School, nor through the Darden Business School. Inquiries to Association of Research Libraries went unanswered. The Training Coordinator for the University Library bravely stepped in and began educating herself on the process. She was, of course, on the same learning curve as the Benchmarking Team, making it difficult to develop a timely class for the team. A query to the LARGE_PSD listserv, asking for contact with those who had done a benchmarking project, brought a response from Pennsylvania State University's Sally Kalin. She graciously consented to spend some time on the phone explaining the process and also to send a packet of information on the benchmarking projects she had participated in. In addition, the Team spent some time reading several books and articles on benchmarking. Fortunately, after a short time, the litany of benchmarking became repetitive and the Team decided to embark on its pilot project.

The basic benchmarking process is straightforward (see [Appendix 2](#) for greater detail):

1. Determine what to benchmark
2. Form a benchmarking team
3. Identify benchmark partners
4. Collect and analyze benchmarking information
5. Take action

Collecting Data

The Team undertook several parts of the process simultaneously. Since there were minimal statistics or other data available on our shelving process, we began to flowchart the process in all 11 libraries and to work on a survey instrument to help us gather data about the process as practiced at the University of Virginia Library. The questionnaire was tested by interviewing stacks supervisors in units where all returned items were not shelved by the end of each day. The outcome was messy at best. It was necessary to revise the questionnaire several times in order to achieve more consistent answers.

Best Practices

<http://www.lib.virginia.edu/mis/benchmarking/bench-ProcessRept.html>

While the Team was brainstorming questions for our internal survey, we also began to explore how to identify best shelving practices at other institutions. The literature on the shelving process is as sparse as the literature on benchmarking in libraries. Instead of relying on the literature, two electronic listservs (LARGE_PSD and CollDev) were queried with the assistance of Diane Walker and Gary Treadway. Those responding to the listserv query were initially asked whether they would be willing to participate in a brief survey. The 19 institutions that responded were sent a short 10-question survey ([Appendix 3](#)) devised to ferret out best practices at institutions similar to the University of Virginia Library. Thirteen institutions responded over the next two months revealing much interesting data about shelving standards and staff sizes. From these responses the Team was able to identify several institutions having what appeared to be "best practices." Contacts made with American Library Association's Library Administration and Management Association officers revealed that no LAMA committee members were aware of institutions doing either benchmarking or shelving studies.

Consultant

The conversation with Sally Kalin of Pennsylvania State University about benchmarking led us to invite Gloriana St. Clair of Carnegie-Mellon University in Pittsburgh to the University of Virginia. Ms. St. Clair presented basic benchmarking information to the entire Library staff, and she assisted the Team in revising the local practices questionnaire and in deciding which institutions exhibited "best practices." She also suggested that the Team was moving toward its objective at a good pace in spite of its reservations about the lack of training in the benchmarking process. She confirmed that the Team should stop reading and "just get on with it."

After Ms. St. Clair's visit, the Team made rapid progress revising the local questionnaire (see [Appendix 4](#)). Answers garnered in the initial staff interviews were re-entered in the revised document and were much clarified in that process.

Measurements

The Team concurrently began to devise a plan to measure several things for which there was no data: how fast books are shelved (books per hour), what the turnaround time is (from return desk to shelf), how accurately books are shelved, and what the turnaround time is for pick-ups. David Griles developed the protocol

<http://www.lib.virginia.edu/mis/benchmarking/bench-ProcessRept.html>

and ran the Sirsi reports with which the studies were done. With the exception of Science/Engineering, Team members carried out the measurements in libraries other than their home libraries.

Site Visits

Simultaneously, Team members began planning for site visits to the University of Arizona and Virginia Tech. These two institutions were chosen because of their reports of 4-hour turnaround time, 94%+ accuracy rates, and previously completed shelving studies. The site visits were planned for mid-April at the same time most of the Team was measuring speed, turnaround time, accuracy, and pick-ups. The site visits were essential for understanding how the best practices really worked. There is no substitute for walking through a process and having an opportunity to ask questions along the way. In addition, the host libraries were asked to fill out the same survey that had been completed by our own stacks staff. This allowed us to identify procedures that were similar and different, thus pointing to how our process could be improved.

Communication

At various points in the project, the Team apprised staff and stakeholders of progress by:

- having stakeholders on the team
- making direct contact with other stacks supervisors
- inviting Ms. St. Clair to present information on benchmarking to the entire staff
- sending an email interim report mid-way through the project to Library@Virginia.edu. (See [Appendix 5](#).)

Report

Using and comparing data from the questionnaire, the best practices email survey, the site visit reports, and our own local measurements, the Team was able to develop recommendations for changes in the shelving process at the University of Virginia. A report on the project, with these recommendations for action, was submitted to the Library's Administrative Council.

<http://lib.washington.edu/usability/newDesign04/Fall2004FinalReport.pdf>

UW Libraries Usability Testing Report: New Design Fall 2004

November 14th, 2004

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1. Executive Summary

This report documents the findings of usability testing performed fall 2004 of the newly designed UW Libraries web site. Ten UW Library users with a range of library web site use performed tasks determined to help understand the ability of users to access resources using the libraries website.

The usability testing indicated that finding resources using the newly designed Libraries website is generally fairly easy. Many of the tasks were completed quickly and easily by participants.

Users easily found:

- Purchase requests
- Library hours
- Citations from the homepage
- The book renewal web page
- Course reserves (via myuw)
- Journals from the catalog in the e-journals page

However, users had difficulties:

- Knowing what fell under "more" on the homepage
- Distinguishing between 'major' and 'complete' databases
- Recalling introductory information provided on the resource pages
- Find services provided by departments within the library
- Understanding the need to search the catalog using the journal title, not the article title

The site received compliments from every usability test participant. These include: "I wish we had this twenty years earlier," "I like having a catalogue link on the home page", and "I love the libraries."