

Gate counts, circ stats, collection size, reference questions—libraries collect lots and lots of data. These statistics, and others, are useful for measuring activity levels within your library, for budget requests and benchmarking against peer organizations. But do they help you understand your users' needs better or gauge their satisfaction with your library?

Setting up a library assessment program can help you organize and structure a vibrant customer satisfaction effort. In doing so you'll have an accurate and compelling process for measuring the state of customer satisfaction and proactively anticipate necessary changes or enhancements to services. And in today's competitive environment for attention and funds, that's vital information that can validate your library's worth.

"Traditionally libraries have judged their worth by counting—the number of volumes, the number of journals, the number of staff—and the bigger, the better," says Jim Self, Director of Management Information Services, University of Virginia Library. "Over the past several years, libraries have been moving away from this narrow viewpoint. Numbers give you important information but how do you know if the library is succeeding?"

For that, says Steve Hiller, Director of Assessment and Planning, University of Washington Libraries, libraries must capture user feedback along with usage statistics.

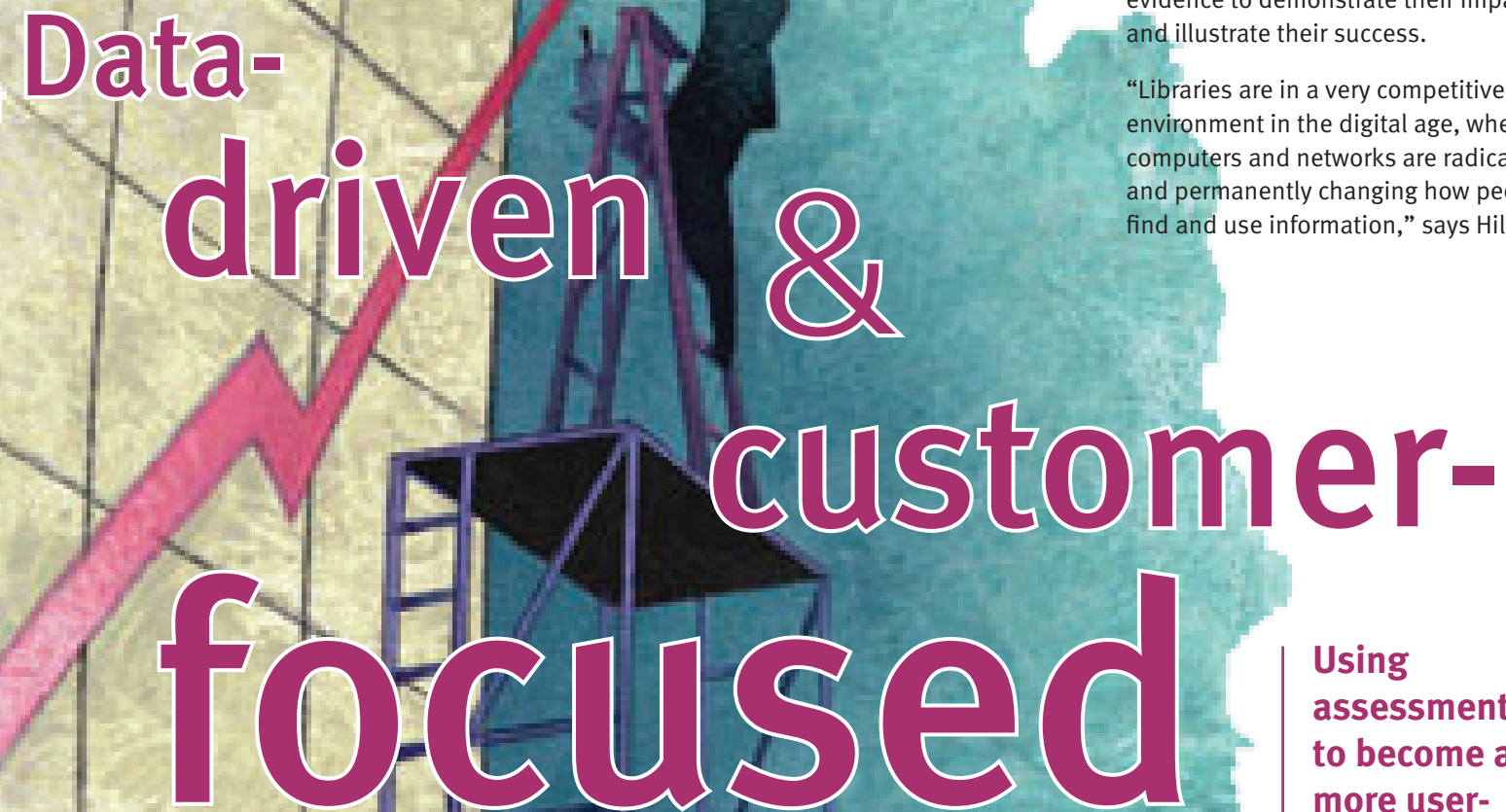
"Users play the most important role in determining our success," says Hiller. "Qualitative methods—such as interviews, surveys, comments, focus groups—gather information directly from them in their language, with their issues and in their words."

The emphasis on qualitative data represents a shift in the direction of accountability, says Hiller. In the past, libraries tried to show they were spending money efficiently and wisely, he says. "While there is still a financial component, there is a much greater emphasis on outcomes and impacts. Essentially we're asked—what difference does the library make? The answer to that is much more dependent on 'qualitative' information."

Self and Hiller were among the architects at their libraries to make assessment effective and sustainable. They also have been part of an Association of Research Libraries (ARL) program to help libraries evaluate assessment efforts and recommend ways to move assessment forward.

Although establishing and maintaining an assessment program can seem overwhelming at first, Hiller and Self say that if you keep it simple and focused you will be successful.

Says Hiller, "There is a common misperception that staff initially need to be highly skilled in statistical analysis and research methodology. Those are important attributes, but can be outsourced or trained for. In our work, we found it was more important for staff to understand the relationship of libraries to the communities they support and ways in which we can contribute to their success."



# Data-driven & customer-focused

By Tom Storey

Using assessment to become a more user-centered library

Both Hiller and Self agree that libraries are well on their way to establishing an assessment community and a dynamic customer service function. And the timing couldn't be better.

Up against popular search engines and powerful Internet research services, as well as other organizations that demand resources, libraries need evidence to demonstrate their impact and illustrate their success.

"Libraries are in a very competitive environment in the digital age, where computers and networks are radically and permanently changing how people find and use information," says Hiller.

"Assessment is an integral tool to help identify trends and understand our customers' needs and preferences. How can we tailor our facilities, services and resources to better support them and in the process define what libraries can do better than anyone else?"

Among their recommendations for establishing a practical assessment program:

- Start with the state of mind. The most important thing may be a change in attitude—developing an assessment frame of mind. Is there a culture of assessment—an inclination to ask what are you doing well, what could be improved, how do you know if you are successful?
- Find a passionate leader. A strong assessment program needs the support of library leadership and an advocate within the organization—someone who is passionate about service quality from the user perspective and will remind co-workers of the need for an assessment component.
- Establish realistic goals. Start small and build on success. Anyone starting an assessment program needs to have realistic goals. You need to be willing to accept and utilize 'good enough' information and make decisions accordingly.
- Decide what data you need. Focus your efforts by deciding what you need to know and why. Work with staff and users to identify what's important to understand and how it relates to the library's strategic directions and priorities.
- Use appropriate and multiple assessment methods. Often a survey is not the appropriate method; an open forum, short survey or group discussion are simple and can add much insight. Observation can also be a powerful tool for learning how communities use space and services.
- Act on the data you gather. How will you use and analyze the information? Make sure you provide results that are understandable and can be used to relate back to what it is you wanted to know in the first place.

## Library assessment at the University of Washington

Since 1992, the University of Washington Libraries has conducted a detailed survey every three years to find out how students and faculty use libraries, what is important to their work, their satisfaction with the library and their future needs.

Among recent findings and library responses are:

**FINDING**—More than 80 percent of undergraduates usually search the open Internet when they need information for a research paper, while less than 50 percent will search an article index.

**RESPONSE**—Integrate fragmented, complex library systems to improve search and discovery, including the use of OCLC WorldCat Local.

**FINDING**—Users want information and services delivered in their space and in the format of their choice.

**RESPONSE**—Develop a scan-on-demand service, digitize collections for online access, increase the use virtual services such as chat reference, and enhance delivery of print material directly to users.

**FINDING**—Online content intensifies use of library resources. By 2007, 91 percent of faculty and 93 percent of graduate students reported connecting to library resources and services at least weekly from outside the library.

**RESPONSE**—Add more eJournal titles with backfiles and other digital content; improve proxy server to make it easier to connect to the library from off-campus.

**FINDING**—Physical libraries are increasingly undergraduate places; nearly two-thirds of undergraduates visit the library at least weekly—unchanged from 1998. During that same period, weekly visits by faculty have declined by 60 percent and by 40 percent for graduate students.

**RESPONSE**—Keep undergraduate library open 24 hours, reduce collections space, add computers and provide inviting and diversified work and service areas.

# Library Assessment CASE STUDIES



## Library assessment at the University of Virginia

The University of Virginia Library staff have been doing large-scale customer surveys for 15 years. They do separate analyses for faculty in each academic unit as well as for graduate and undergraduate students. In each of their surveys, they ask respondents to rate on a 1-5 scale a long list (between 50-100) of services, resources and facilities.

Over the years, assessment information has been compiled and used to verify that not all customers had the same wants and needs, that there are specialized needs for each academic unit, to improve shelving, redefine collection development, renovate study space and extend the undergraduate library's hours to 24/7.

Joint World Bank—International Monetary Fund Library: Collection assessment proves library's worth

At the Joint Bank-Fund Library, 2006 brought talk about budget constraints and library downsizing. In particular, the size of the print collection and the cost of the space required to house it were being vigorously challenged—and targeted as a possible cost reduction area.

OCLC's WorldCat Collection Analysis tool provided the evidence the library needed to demonstrate its effectiveness and value. The analysis showed that 64 percent of the library's collection was unique compared to the collections of the five local academic libraries. In other words, the library's collection provided valuable resources not available elsewhere that supported the business and research needs of staff by providing quick and easy access.

Armed with this data, the Joint Bank-Fund Library was able to substantiate and quantify claims of the unique nature of its valuable collection.

## Pierce College

In its assessment program, the Pierce College Library, Lakewood and Puyallup, Washington, is moving beyond collecting circulation and collection statistics to ferret out how students actually use library resources and to what results.

Recently, library faculty put in place a system to track instructional effectiveness that included a database to measure student progress toward information literacy. The most significant finding was the correlation between the numbers of times per week students with a high GPA interact with a librarian; the higher the number of interactions, the higher the student GPA. This information helped the library justify a higher librarian-to-student ratio and protect itself from budget cuts.

## USC Norris Medical Library

The Norris Medical Library at the University of Southern California used focus groups to respond to user needs and preferences. For example, in the research area, a library focus group revealed faculty frustrations in trying to keep up with the enormous proliferation of data analysis tools and databases in their fields. Although literature-based databases were still important, it was essential for faculty to improve their knowledge and use of resources that would analyze and interpret large quantities of data.

The library responded by hiring a Ph.D. in molecular biology to develop and conduct ongoing training sessions in selecting and using bioinformatics resources; to provide consulting services for research teams in their labs; and to develop and maintain a Web site to promote and support the use of these resources. In addition, the role was responsible for disseminating information about new tools available for use by the USC research community.

In addition, focus groups made the library aware of knowledge gaps about a number of general services, information resources and perceived barriers to using the library. As a result, the library strengthened its liaison program to ensure that librarians were addressing these gaps in departmental presentations and individual meetings. The library also reorganized its Web site to improve navigation and highlight key resources and items of interest.

## West Bonner Library District

When the West Bonner Library District, Priest River, Idaho, needed a plan to renovate one library and build a new one, its leaders turned to people who would know the best possible blueprint: the library users! To gather community input, the library held a design focus group moderated by an architect with good communication skills who also specialized in high-performance building designs.

The architect ran an exciting, fast-paced brainstorming session to record the community's ideas for furniture and fixtures, lighting, signage, equipment, space use and services.

The result was a community-driven and -supported design that was unveiled at the annual wine tasting event sponsored by the Friends of the Library. Today, the community and library staff are researching and identifying grants to get the new and renovated libraries built.

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## Maryland Public Libraries: User input means \$15 million

In 2003, facing the potential of stiff reductions in state funding, the Maryland public library community needed evidence to illustrate their value to state legislators. They hired an independent, nationally-known polling agency to gather input from 1,700 residents in 24 counties to prove what they hoped they already knew: Marylanders place a high degree of pride in their public library systems.

They were right, and then some! The data were so overwhelmingly positive that it led to \$15 million in new funding over four years, as well as an additional \$5 million per year in library construction and renovation aid.

The survey revealed that residents give public libraries the top rating (3.3 out of 4) of all local services: police and public safety, parks and recreation, public schools, social services, roads and mass transit, and local government efficiency. Forty-two percent of respondents gave their libraries an 'A'; 76 percent thought that their public library was an essential service.

**“The statewide, customer assessment gave the Maryland public library community the tangible evidence it needed, not only to protect funding but to increase it.”**

## Loyola Notre Dame Library

To be user-centered and ready to adjust to user preferences, the Loyola Notre Dame Library in Baltimore, Maryland, regularly assesses its programs and services using a number of tools, including campus surveys, LibQUAL+, user comment forms and benchmarking with a peer group of libraries (Affinity Group). The data and input the library gathers drives much of its strategic plan, which the library establishes every five years but reviews for progress every six months.

Among the findings the library has uncovered through its assessment efforts, and how it responded: Users identified lack of digital content as a weakness, despite the library having more than 38,000 e-titles in its collection. To resolve this disconnect, the library hired a public relations librarian and launched a marketing initiative to raise awareness of the wealth of e-resources available to students to encourage greater usage of e-titles. In its next round of customer surveys, the library will probe users to see how successful they have been at changing this misconception.

When comparing statistics with a peer group of 33 libraries, Loyola Notre Dame confirmed that its circulation increase was no fluke. With this evidence, the library was able to lobby its university administration and increase its acquisitions budget for books and other items in its physical collection.

