You want us to do what?:

Practical, data driven planning and decision making....
Presenters:
University of Arizona Library Access & Information Services

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Overview

- Importance of Needs Assessment
- Resources Involved (FTE & Technology)
- Sources of Data
- Tools You Can Use to Analyze Data
- Outcomes
  - Environmental Scan
  - Strategic Planning
  - Implementation of new services
Why data driven planning and decision making?

- In the past decade, with shrinking budgets and resource limitations, there has been increased pressure on library organizations to maintain or cut costs, while at the same time, increasing both the variety and quality of services offered.

- This has created an environment where organizations must focus on the services that bring value to our users while supporting their need for information, research and education.

- Needs assessment and the resulting services, measures and outcomes provide accountability for institutions and have become critical processes to organizational survival and success.
Why data driven planning and decision making?

- Needs assessment provides organizations with insight into existing services and whether or not to add, modify or discontinue these services.

- Evaluation provides organizations with knowledge of user satisfaction, effectiveness and efficiency.

- Together needs assessment and evaluation are tools that allow for data-based planning and decision making.
Why data driven planning and decision making?

- Needs assessment and evaluation are not one-time efforts.

- In order for organizations to be successful with envisioning current and future needs, they need to understand the importance of continual needs assessment and evaluation.

- User needs and expectations are rapidly changing. We can no longer assume that we know what is best for our customers without asking or observing.
Why data driven planning and decision making?

- As organizations, we need to be proactive in scanning the environment and knowledgeable about changes, often involving technology, that can be implemented at our libraries.

- At the University of Arizona Library, we have established a coordinated approach to planning, performance measurement and accountability.

- We align strategic planning, team planning, individual planning and performance management in one annual cycle of activities with a focus on customers and the future.
Continual Needs Assessment, Evaluation and Planning

- Customer Feedback
  - Data Gathering/Environmental Scanning (Current Situation/Future Trends)
  - Library-Wide Strategic Plan
  - Team/Department Strategic/Annual Plans and Individual Performance Goals
  - Continual Assessment/Evaluation Measurement of Metrics (efficiency and effectiveness)
Continual Needs Assessment, Evaluation and Planning

- Information from our needs assessment process is verified with several data sources and national trends.
- Data and information obtained from our needs assessment tools are shared with customers, student executive governance councils, student library advisory groups and library-wide for the benefit of other library teams.
- For this presentation we will not focus on our entire strategic planning process, but instead present a variety of approaches and tools that support an integrated plan for continual needs assessment and data collection.
Resources (within AIST) devoted to needs assessment, evaluation and planning

- Library Information Analyst coordinates overall team environmental scanning, data collection and analysis, team statistics and strategic planning processes. (10%)

- Three Library Information Associate Seniors assist in the above coordination, each being responsible for specific pieces. (10% each with one who also manages team statistics at almost 20%)

- Library Information Associate who assists with running statistical reports from ILS and data entry (5%)

- Overall – 0.55 FTE devoted to these processes with meetings throughout the year with the AIST Leadership Team
Collecting the Data:

- We have always looked at customer activity as measured through a variety of sources:
  - Library ILS system – Circulation Statistics
  - Gate Counts for buildings
  - Data for Specific services and activities like shelving
  - Number and type of Questions asked at service desks.

- Data is useful – but incomplete – did not include the “voice of the customer”
Collecting the Data:

- Library Report Card
  - Simple Customer feedback form linked off of main Library website
  - Comments and questions reviewed and answered each month. Many of the comments were answered by AIST staff as they concerned our processes and services.
  - Started to review and collect these comments in 2002 after noticing certain recurring themes.

- LibQual Survey
  - Administered each Spring.
  - Sent to a large sample of our campus community via email.
  - Survey tool focuses on “big” library wide issues.
Collecting the Data:

- Library Services Survey (Action Gap) - Conducted over one week each Fall.
  - Focused on management of equipment, staffing and spaces in which we provide information & referral
  - Online version (SurveyMonkey) - Linked from public computers
  - Printed copies at all service desks

- Information Commons Headcount – Conducted during one week each month.
  - Use of computer workstations
  - Use of Laptops
  - Group study rooms
  - Collaborative spaces
Collecting the Data:

- Overnight Building Headcount – Started in 2008 at Main library by overnight staff as part of their regular safety checks.
  - Looking for similar information except it is throughout the entire building:
    - Number of users by floor
    - Number of users in group study rooms and private carrels
- Based on this information, we are planning to conduct needs assessment using formal observation tools and techniques
Collecting the Data:

- Customer Observations/Interactions - Information collected by desk staff – ongoing.
  - Asked to document any instance of an “unmet customer need”
  - Request for services we don't provide or are unable to provide due to limit in availability.
  - Originally sent in via email. Moved to DeskTracker form to centralize the collection of information - easily exported into excel and other software for analysis.

- Other Data Sources (Usually tied to a project or specific service)
  - One time surveys
  - Focus Groups
Checking the Data

- Staff conference summaries
- Webinars
- Listservs and benchmarking other institutions
- Reports
- Social Networking / Blogs
Tools used

- NVivo (N6) – Qualitative Software created by QSR
- Survey Monkey – Quantitative and Qualitative
- Excel (data and charts) – Quantitative and charts
- Purchased LibPAS – Library data management created by Counting Opinions
Tools used – NVivo 9

- NVivo 9 – Qualitative Analysis Software
  - All comments coded in Nvivo
  - Crosstabs & text searches
- Data Sources:
  - LibQual Comments
  - Library Services Survey Comments
  - Library Report Card Comments
  - Desktracker & Staff emails
Tools used – Survey Monkey

- Survey Monkey
  - Quantitative (customer satisfaction survey)
    - What we do best
    - What we need to improve
    - What is important to the customer
  - Qualitative – comments are added to the NVivo database

Cravenho, John and Bill Sandvig. “Survey for Action, Not Satisfaction.” Quality Progress, Mar 2003; pg. 63-68.
Tools used - Excel

- Library Services Survey – charts
- LibQual – analyze raw data
- Circ Stats – trend analysis
- Comments – in emergency case
  - Formulas
  - More errors
Tools used -

- LibPAS – Library Data Management system
  - Counting Opinion Product
  - New purchase
  - Plan for implementation
  - Capable of gathering all quantitative and qualitative data we’re currently gathering into 1 place
Methodology

- Used Glaser and Strauss’ Approach of Grounded Theory\(^1\) Open Coding to create 111 categories to code comments gathered from surveys and other data sources.
  - Grounded Theory approach – Categories are derived from the comments
  - Categories reflected the LibQual big themes of Information Control, Service and Environment
  - 111 categories provided granularity of the data (over 2000 comments last year)

Methodology

- Selective Coding\(^2\) then led us from 111 categories to 25 categories within 4 core concepts
  - 4 core concepts reflect LibQual’s 3 aspects – Affect of Service, Library as Place and Information Control plus 1 aspect we identified as “Specific Services”

- Dimensions of the core concepts, dividing up the categories
  - Example: Study Space coded under core concept of ENVIRONMENT
    - Study Space has 3 dimensions: Individual, Group, Reserving
  - Other dimensions: neutral, positive, negative

Pulling it all together

- 111 to 25 categories
  - 25 Categories – easier/quicker to code then we can drill down or do text searches to test hypotheses.
  - Pull all qualitative data into 1 database to get overall picture to develop hypothesis, then test that using the other data sets.
  - Strategic Projects are identified to improve/create a service/product, which are then assigned to individuals, tracking progress through developmental reviews.
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<thead>
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<th>Sample of categories</th>
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<tr>
<td><strong>Before</strong></td>
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<td>DESK/GENERAL--Approachable</td>
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<td>DESK/GENERAL--Available</td>
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<td>DESK/GENERAL--General</td>
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<td>DESK/GENERAL--Knowledgeable</td>
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<td>CUSTOMER FEEDBACK</td>
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<td>CAMPUS MAP</td>
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<td>DATABASE ISSUES</td>
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<td>DATABASE ISSUES--Remote Access</td>
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<td>INSTRUCTIONAL MATERIALS--UPDATING</td>
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<td>LIBRARY COLLECTIONS</td>
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<td>ENVIRONMENT--ADA</td>
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Our goal in communicating our value is to keep customers informed on changes that have resulted from their direct feedback and our work in scanning the environment.
Questions?