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Keeping a finger on the organisational pulse: surveying staff perceptions in times of change.

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Abstract

While surveying clients has become a standard part of research libraries' qualitative assessment programmes, regularly surveying a library's own staff is less common. Client surveys at the University of Queensland Library consistently reveal that the Library staff are regarded as the Library's greatest asset. It is important to work at ensuring that these two hundred and fifty assets feel positive and motivated in their work, particularly in current times of rapid change in their workplace and sometimes the actual nature of their work. This paper examines the Library's experience of surveying the staff five times over eight years. It examines the survey instrument itself, and the methods of analyses employed to interpret the data.

Introduction

The last ten to fifteen years have seen extensive change in the information industry, and much attention is given to monitoring, analysing and also anticipating the attitudes of clients to service delivery and information resource provision in libraries. Less frequent, however, is the practice of systematically surveying the Library's own staff, whose attitude to the workplace governs their willingness and ability to continue to deliver quality services to the high standards that clients expect.

The University of Queensland Library has conducted Staff Perception Surveys biennially since 2000, the first two being manual, and subsequent surveys being conducted online using software developed in the Library.

The survey invites respondents to indicate their perception of the importance of a number of statements and also how they think the Library is performing on the issues. The statements are categorised into: training and development; customer focus; recognition and development; goal setting and feedback; communication; employee involvement, well-being and morale; employee relations; senior management; local/branch leadership. An opportunity for free text comment is also included.

The bivariate methodology used in the survey allows for the identification of the gap between perceptions of importance and performance for each statement, and also an indication of priority for action to be assigned to issues. Time series analysis of results from successive surveys allows management to see shifts in the "pulse" in response to change implemented since, and possibly in response to, the previous survey. Free text comments are analysed using Leximancer^{TM, i} a University of Queensland developed software tool which enables users to identify key themes, concepts and ideas from unstructured text.

While the survey is anonymous, enough demographic data is collected to enable responses to be analysed by branch/section of the library and by level of the staff members. Thus it is possible to see pockets of discontent or satisfaction amongst a particular staffing level in a particular unit of the organisation. Time series analysis shows whether such group pulses are moving in a positive or negative direction. Examination of the responses of different levels of staff to individual statements also shows where there is a mismatch of perceptions – senior management might think communication is very good for example, but junior staff responses might reveal that their experience is quite different.

The survey has proved itself as a valuable tool for management in the Library. Results are published on the staff intranet (including the full text comments), so all staff at all levels have full access to the results. Staff participate in subsequent focus groups and working parties which may be set up to address issues arising in a survey. The survey has also proved itself of particular value in a period of transition between Heads of the organisation.

Culture of Assessment in context

The UQ Library has a strong culture of assessment. A quality assurance framework includes both quantitative and qualitative assessment, with continuous cycles of response and renewal. A wide range of statistics has been recorded and benchmarked nationally and internationally for a very long time. Statistics are recorded using the Library's LibStatsⁱⁱ online software, and reported to the Council of Australian University Librarians for benchmarking through their statistics website. Client perception surveys have been conducted biennially since 1999, using the InSync Survey, (formerly Rodski). Outcomes from these surveys are benchmarked against other tertiary libraries in Australia and New Zealand. Over time, the database of results has built up to allow for time series analysis to reveal trends. Other assessment methods have been used as called for by specific circumstances – focus groups, space use surveys, design workshops all contribute to the effectiveness of the plan, do, report, review framework.

The culture of assessment extends seamlessly into the assessment of the organisational climate of the Library itself through the staff perception survey. Staff in this Library, as in all others, are asked to deal with constant change in many arenas of their work life. They are barely comfortable with one technological innovation or client expectation when another comes along to unseat it and require another exercise in skills acquisition or attitude adjustment. Being able to report regularly on how they are travelling through this, with confidence that current or emerging problems will receive attention, is generally accepted as a logical 'given'.

The period covering the last three surveys has featured some high profile changes in the local Library environment, apart from those arising from information industry drivers or political and economic factors. The previous University Librarian left to take up a new appointment at the beginning of 2005, and the Library was headed by an Acting UL for eighteen months. The new appointment to the position arrived in June 2006, and almost the first thing on his desk was the report of the 2006 Staff Survey. Two years later, the 2008 survey is almost a report card on his first years in office. During that time, there has been a restructure in the service delivery units of the Library, a number of changes in management level staff, and a number of new processes introduced, including an extensive project management framework.

The Survey – response and analysis

The response rate to the survey in the Library has been consistently around 70%. There has also been a consistent proportion of responses from each of the three major organisational units – two service delivery units, (Engineering and Sciences Library Service, and Social Sciences and Humanities Library Service) and a service support grouping of three smaller units (Library Corporate Services, Information Access Service, Library Technology Service). Also proportionately representative have been the responses from the various Higher Education Worker (HEW) levels in the Library. These have been grouped in both the demographic identifying information and in the analyses into three categories - HEW 1-4 (Service support assistants and library assistants); HEW 5 -4 (professional librarians); HEW 7-10 (Librarian supervisors and managers). These factors support a high degree of confidence in the statistical reliability of the results.

Respondents to the survey rate sixty-five elements on a scale of one to six, for both importance of the element to them and how they perceive the element is being performed in the library. Analyses conducted include calculation of means for both importance and performance, which are then used to calculate gaps (difference between importance and performance, with a gap of 1.67 or higher being statistically 'significant'. The elements are also prioritised (importance multiplied by gap); and a scattergraph is produced plotting gaps against importance, which points to areas where attention needs to be focussed.

These analyses are conducted for a number of different cohorts – all returns; each of the two service delivery units of the organisation; the service support grouping; and the three HEW groupings, and also for cross combinations of the cohorts (for example, the HEW 1-4 respondents in the Social Sciences and Humanities Library Service).

Table 1 shows the online analysis gateway. Any individual response can be analysed, or any selection of responses (responses are assigned a sequential number as they are submitted). The various cohorts, individually or in combination, can be selected. Results can be presented in order of importance, performance, gap or priority for the survey elements. Comparison with the results of the previous survey is an option, and inclusion of free text comments, either unsorted or sorted by cohort can be selected.

← Importance →

1. Less important issues that require improvement							2. Relative weaknesses and issues that require improvement								
			11	14		5								[max]	
						26									
		8				48		25							
					4,22				47						
						12,29 53			34						
									51	1		39			
					33		52,58 59	4,7 55		2,65					
↑	Gap	17				20,23		32	46				27,40		
									31	30	28,41	43			
			21					54	13,56 62		45,64	37,49		44	
		10				3								38	
			18							42			35		
											50,63	16			
		9				57									
								19					60	36	
											61				
									15						
		[min]	24												

3. Relatively unimportant issues that are done well 4. Relative strengths and issues that need to be maintained

Table 2: Scattergraph

1. Less important issues that require improvement							2. Relative weaknesses and issues that require improvement								
								5	26	48					
			11	14			5							[max]	
							26,34	25							
		8,8 14	4,11		29					25,17					
				12	4,22 59			58			47				
				53		12,29 53,53		55		34		2,45	41		
							6	1,32		46	51	1	39,40	39	
		18,21 25		33		33		52,58 59	6,7 34,66	29,31 65	64	2,49 65		38,44	
↑	Gap	17	10			20	20,23	3,13 56	32,51 54,62	46		27,43		27,40	
		17				23		7		31	30	28,37 41	43,50		
			21					54		13,56 62		45,64	37,49		35,44
		10				3					63	16			38,60
			18			57					42			35	
		9								42	61		50,63	16	
		9				57									
						19	19							36,50	36
												61			
		24								15					

Table 3: Scattergraph showing trends

The trend scattergraph reveals that there are fewer items in quadrant 2, the least desirable space, than there were in the previous survey two years before; that there are more items in quadrant 4, the “best” place to be; that 11 items have moved from quadrants 1 or 2 into quadrant 4, which is a positive trend; and that there are four items which have moved from quadrant 1 into quadrant 2. This is not a move in a positive direction, so those items are claiming attention. Even though, in most cases, these items do not show a significant gap, managers regard them as “smoke signals” pointing to mild dissatisfaction which, left untended, could develop into more serious discontent.

Happy or Unhappy?

The practice of studying gaps, priorities, and trends, and acting in response to them, has become well established in the history of the survey. In the current year’s survey, a further analysis was undertaken, focussing more closely on a particular group of people, the unhappy ones.

Question 66 of the survey asks respondents if they want to be working in the Library in one year’s time. The surveys with a ‘No’ answer to this question (11% of the total responses) were analysed as a cohort. The thinking was that if these people were indicating general dissatisfaction with their situation, it would be useful to see what things were of concern to them. What were their gaps and priorities? Addressing these could perhaps significantly improve organisational climate. However, what the analysis showed was that this group of respondents do not like anything. They returned forty-five ‘significant’ gaps. The scattergraph showed most items in quadrant two, and their trends were markedly negative. A visual check of these responses showed that often they had marked the top score (6) for the importance of all elements, and the bottom score (1) for the perceived performance of that element. These were not people who were expecting to be gone from the Library in a year’s time because they had been promoted into another position, or retired from the workforce. They were people indicating that they just did not like anything. For a (very) short time the option of reconfiguring the Library to suit people who were perhaps born unhappy flashed into the consciousness of Library management; but was speedily rejected. Advice from organisational culture consultants was that organisations typically have a group of employees who are persistently discontented. In fact, this group usually accounts for from fifteen to twenty percent of employees; and that, although they are discontented and indicate that they would rather be elsewhere, they do not in fact leave the organisation.

Flipping the coin, an analysis was done of the responses with a ‘Yes’ to question 66. This group returned no significant gaps, only two items in quadrant two, and most items in quadrant 4. The two items in quadrant two become a focus for management attention. If these are things of concern to people who are in general content, they are deserving of prompt action.

The impact of the group of unhappy people on the organisation as a whole is important. When all responses are included in the analysis, there are eleven items in quadrant 2 of the scattergraph. When the ‘unhappies’ are excluded from the analysis, this reduces to 2 items. When the analyses are run for specific cohorts, the exclusion of the ‘unhappies’ reduced the quadrant 2 items from 24 to 7 for one Service Delivery unit. For one of the HEW cohorts, the four ‘significant’ gaps disappear and the 18 items in quadrant 2 reduce to 4 when the ‘unhappies’ are excluded.

For Management, the obvious question is how to respond to this. Given that the unhappies are never going to be happy, that they are not likely to go elsewhere, and that it is not

possible to remediate their discontent, the only possible response is really no response. Individuals who know themselves to be part of this group will know that management is aware of their attitude but refuses to be side-tracked by it. Instead, management attention is seen to be focussed on those who are willing to be satisfied in their work environment. The desired outcome is that strengthening the culture and work experience of the ‘happies’ will reduce any vulnerability they may have to the influence of the ‘unhappies’.

Open text responses

Two questions in the survey invite open text responses: What do you think are the library’s strongest points (the most favourable things about the library)?; and, What do you think are the library’s weakest points (things or areas that need improving)? The two questions categorise the comments into two groups before any analysis – the positive and the negative!

The Library uses software called Leximancer™ to analyse free text. Table 4 shows the concept map produced for the text in the “strongest points” category. The software also produces a ranked listing of concepts, and enables the viewing of the sections of text where concepts are located, and also shows sections of text where concepts selected by the end-users are co-located. Logbooks of all instances of a particular concept can be produced.

Leximancer - Strongest points concept map – all of library

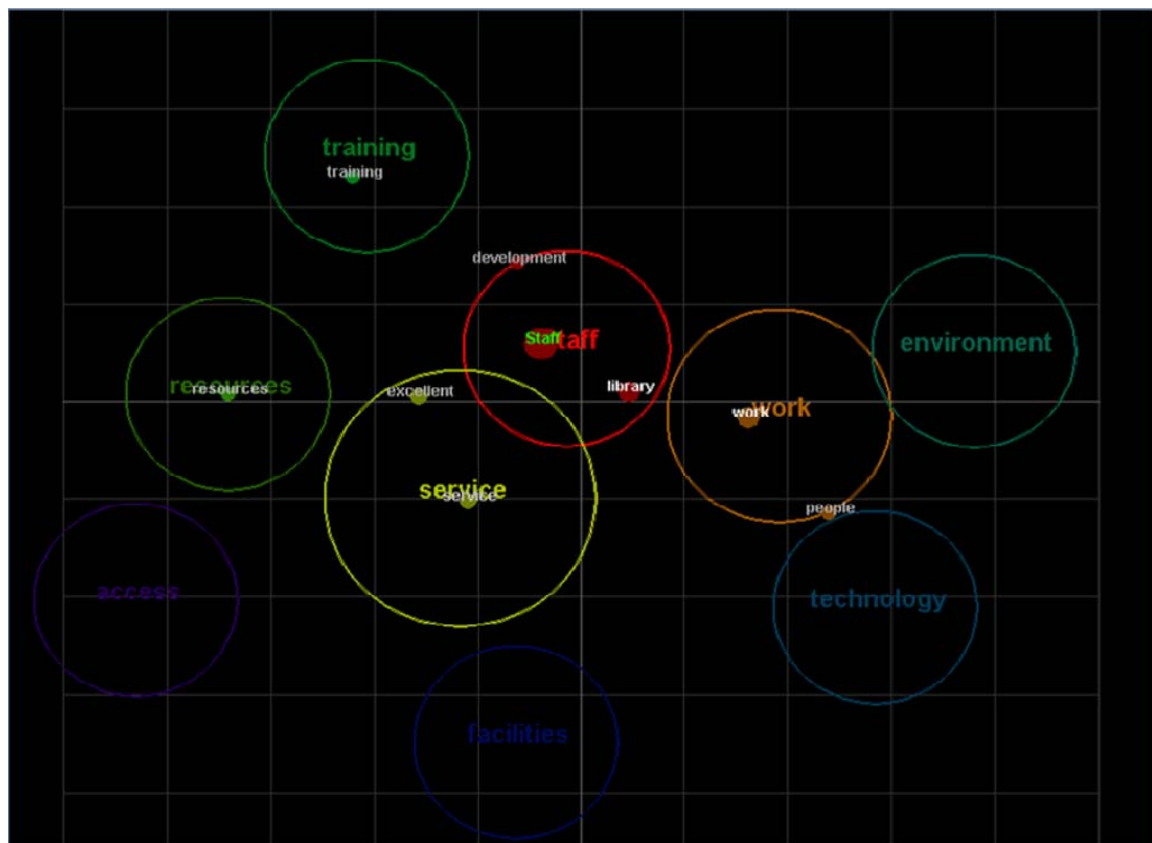


Table 4. Leximancer concept map

Deepening the analysis

The Library used the concepts, or themes, identified by Leximancer™ and the gaps and priorities from the survey hard data results to further mine the attitudes of a cohort of staff

whose analysis had indicated negative trends. Post survey focus groups were held, in which groups of five were given a theme and a related element from the survey question set, and asked to frame a number of questions of their own around the theme. These questions were then posed to the whole cohort, and individual responses were recorded using the *Keepad Interactive Audience Response System*ⁱⁱⁱ. The framing of their own questions gave these staff the opportunity to point to the specific aspects of the issue which concerned them. As an example, questions posed around the Training theme pointed to problems with filling service point rosters when staff were absent at training sessions, and a perception that staff at all campuses might not have equal opportunities to attend training events. The Keepad clicker technology allowed for anonymity in recording responses. The software produced a comprehensive analysis of the responses, so the exercise resulted in a deeper understanding of the nature of the issues which were causing concern for the cohort.

After the survey

Survey results are published to all staff via the staff intranet, and staff across the library are engaged in determining actions in response to what the survey results have revealed. Over the life of the survey, outcomes have included major reviews of communication practices, human resources procedures, and the role and duties of the Library's Liaison Librarians. The effectiveness of changes is measured by the next survey. The Library has found the survey to be an indispensable tool in the management of its most important resource, its people during times of rapid development and extensive change.

Addendum: A note on the software

The survey form comes from a PHP program that takes the question text data and writes the form programmatically. This is about 700 lines of code, including the questions themselves. The form writes out as an HTML page, on a machine running Apache as its web server and PHP5. The data is uploaded directly into a MySQL database. The analysis of the data has grown over the iterations of the survey. Again, it uses PHP and does a number of queries on the MySQL database. Even though the results of previous surveys have been stored in separate tables, and there are slight variations between them, queries have been designed that produce comparative data. The analytic instrument for the latest survey runs to almost 3000 lines of code. Interested parties may download the software from <http://www.library.uq.edu.au/software/>.

ⁱ Leximancer™ <http://www.leximancer.com/>

ⁱⁱ Elizabeth Jordan, "LibStats: an open source online tool for collecting and reporting on statistics in an academic library", *Performance measurement and metrics* 9 (2008): 18-25.

ⁱⁱⁱ <http://www.keepad.com/home.php>