TDL Survey 2012

A Survey of Member Librarians and Users

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GOALS OF THE TDL SURVEY

The Texas Digital Library was established in 2005. Since that time, the organization has grown to include as many as 19 members, and has now plateaued at 15 members.

Since 2005, TDL has offered a suite of services that has remained largely unchanged – focusing on the bridge between scholarly communication distribution and the ability to capture and curate scholarly communication at the universities where the material is created. To that end, TDL has deployed and managed open-source software, developed software, and provided both training and a community to support member campuses as they developed their individual digital library efforts.

Beginning in April 2011, the TDL reorganized its leadership and focus on service rather than software development. In November 2011, the TDL Governing Board outlined a series of Strategic Initiatives intended to guide TDL activities and provide direction for member libraries, the leadership at those libraries and TDL full-time staff.

The development and deployment of a comprehensive survey was an initial goal of the Strategic Plan, in order to:
1. review the state of TDL **services** among members
2. investigate **outreach and communication** regarding TDL both between TDL and its members and between member libraries and their constituents
3. examine the **organizational structure** of TDL and determine if the past and current structure can be improved upon

Based upon the results, the TDL Governing Board will make recommendations for changes or enhancements across the organization, putting into place new policy that will align TDL staff activities, TDL member activities and TDL leadership activities with the Strategic Initiatives. Deltas discovered between the needs of the initiatives have been identified, and recommendations have been provided.

SURVEY METHODOLOGY

The TDL Member Survey discussed in this document was a cross-sectional survey of the TDL membership, executed through the use of an online questionnaire that was disseminate to a representative sample of the TDL membership, including library leadership, library staff, staff at graduate schools, and faculty end-users.

The survey questionnaire was created by a 17-member committee beginning in June 2012, and was opened in September 2012.

Survey sample and response rates

The list of survey recipients was developed by TDL staff in conjunction with the directors of TDL member libraries. It included recipients from all TDL member institutions with the following roles:

- Library staff at TDL member institutions
- Staff at graduate schools that use Vireo ETD software
- Faculty end-users of TDL services
- TDL Library Directors*

The TDL does not know a definitive number of those who received the survey for two reasons: first, because any direct recipient of the survey link could have forwarded it to a colleague, and second, because in certain cases, TDL depended on library directors to disseminate the survey to the appropriate personnel at their campuses. The TDL estimates that approximately 125 people received the survey link.

Directors received a modified survey, the results of which are not included in this report.

Response Rate:

- **Members Survey:** 48 respondents out of an estimated 125 recipients (38%)

About the respondents:

- 61% came from Tier 1 schools and 39% from Tier 2 schools.
- 66% identified as coming from large institutions; 19% mid-sized; 15% small
- 53% of respondents said they were "not a primary liaison between the TDL and their institutions." 21% said they were primary liaisons.

Large, tier 1 schools were disproportionately represented in the survey results. Clear distinctions between responses from large schools and smaller schools are noted in the results analysis.

Because of the compressed time frame for the survey, the scope of the effort, which had originally included the intention to canvas non-members/potential members, was narrowed to "members only."

Instrument Design

The TDL Members Survey was an online questionnaire developed in Survey Monkey and disseminated via email to participants.

The survey included both quantitative (i.e. multiple choice) and qualitative (i.e. open-ended) questions. It was designed to be a cross-sectional survey, giving a picture of the TDL membership in the Fall of 2012.

Instrument Design Timeline

- Dana Rooks, Dean of Libraries at the University of Houston and then-Vice-Chair of the TDL, convened a committee of 17 staff members from TDL member institutions to develop the survey.
- The committee consisted of three sub-groups, each dedicated to a particular area that the survey would assess. These areas were: **TDL Services**, **Marketing (i.e. promotion and outreach)**, and **Organizational Structure**.
- The full committee met in Austin on June 8 for a day of discussion and training. Meredith Taylor, Assessment and Quality Improvement Coordinator at UT Libraries and Krystal Wyatt-Baxter, Instruction and Assessment Librarian at UT Libraries, provided training on questionnaire design and survey methodology.
- Sub-committees worked throughout the summer to design questions for their assigned areas.
- TDL staff worked with UT Libraries experts to refine and consolidate the question groups into two surveys: one for Library Directors and a second for other member-users.
- The survey was submitted to the UT Austin Institutional Review Board to determine if the IRB would require a review process be undertaken for the survey. It was determined that because the survey was designed for "institutional improvement" and the findings would not be formally published, it would not have to undergo review by the IRB.
- Surveys were opened in September and respondents were given 2 weeks to take the survey.

Maximizing Response Rates

The TDL attempted to maximize response rates to the survey in the following ways:
- Through advance communication to the membership at large and to member directors. This was done to prepare respondents for the survey and set expectations. The TDL communicated with member directors through the Fall Annual Meeting and follow-up emails to encourage response from directors and their staffs.
- By developing a respondent-friendly survey questionnaire that was brief and clear.
- By sending follow-up reminders while the survey was open.
- By guaranteeing confidentiality to survey respondents.

Analysis Methodology

- Once survey results were collected, TDL staff worked with Survey Sub-Committee Chairs to prepare a preliminary analysis of the results.
- Open-ended responses were coded by three TDL staff members independently and reconciled by majority vote.

Analysis of Survey Results

TDL Services

Summary

- **DSpace and Vireo are the services most valued** and most used by TDL members. TDL's DSpace service is slightly more valued by smaller institutions, while Vireo (and software development related to Vireo) is slightly more valued by larger institutions.
- Majorities of respondents indicated that the following services are "valued" or "very valued": the TDL Federated Repository, Open Journal Systems (online academic journal hosting), Open Conference Systems (conference management site hosting).
- **WordPress and MediaWiki were the lowest valued** digital communication services offered by the TDL.
- "Soft" services, such as data management planning resources were not highly valued.
- The most requested service improvements were: (1) **Repository improvements** and enhancements; (2) **Customization options** for various services (e.g. web design services for journals and websites); (3) **Open Journal Systems improvements** (e.g. integration of OJS with repositories)
- The **most requested new services** were: (1) Data Repository; (2) Preservation services; (3) GIS repository.
- The perceived value of specific training courses tracks closely to the perceived value of the services themselves (i.e. DSpace and Vireo training are rated more highly than others.)

SERVICES RATING AND USAGE

Respondents were asked to (a) rank the value of and (b) state the usage or non-usage of various TDL services.

DSpace
- Overall 82% of respondents rated DSpace either "valuable" or "very valuable."
- Small institutions were more enthusiastic about DSpace, with 86% of respondents from small institutions deeming DSpace "very valuable," as opposed to 51% overall who rated it "very valuable."
- The perceived value of DSpace as a service may be linked to its high usage among small institutions: 100% of respondents from small institutions said that they used this service.

Vireo and software development related to Vireo
- 100% of large institutions rated Vireo either "very valuable" or "valuable." For mid-sized and small institutions this number was lower (67% and 71%, respectively).
- A large percentage (69%) across all institution sizes indicated that software development related to Vireo was "valuable" or "very valuable.

TDL Federated Repository
- A majority of respondents (56%) said the TDL Federated Repository was "valuable" or "very valuable."

Preservation services and software development related to DPN
- More than half (53%) thought preservation services were very valuable, but a large percentage (41%) was neutral or didn't know, perhaps indicating confusion over the state of preservation services at TDL.
- Similarly, large percentages responded "neutral" or "don't know" regarding software development for DPN.
- 47% of respondents said they plan to use preservation services through TDL in the future.

OJS
- 63% of respondents thought OJS was a "valuable" or "very valuable" service and those percentages were comparable across all sizes of institutions.

OCS
- 56% of large institutions thought OCS was valuable, but the percentages were lower for smaller institutions (44% for mid and 43% for small)

WordPress and Mediawiki
- WordPress and MediaWiki were perceived as considerably less valuable than other digital scholarly communication services offered by the TDL. Fewer than 25% of respondents overall believed these services were "valuable" or "very valuable." Smaller institutions were more likely to find WordPress to be a valuable service than large or midsized institutions.
- Substantial percentages of respondents said they use similar services from other providers (roughly 25% for WordPress and 16% for MediaWiki).

Resources for data management planning
- Large percentages responded with "neutral" or "don't know," perhaps indicating confusion over what resources TDL offers for data management planning.

The most requested service improvements were:
- Repository improvements and enhancements
- Customization options for various services (e.g. web design services for journals and websites)
- Open Journal Systems improvements (e.g. integration of OJS with repositories)

The most requested new services were:
- Data Repository
- Preservation services
- GIS repository

TRAINING SERVICES

The survey asked respondents to rate individual training courses offered by the TDL.

Intro to metadata
- Overall, 42% of respondents found the Intro to Metadata course "valuable" or "very valuable." It was considered especially valuable by respondents from small institutions, with 86% of respondents finding it "valuable" or "very valuable."

- Subtracting respondents who had not attended an Intro to Metadata class, 65% of respondents overall found the class "valuable" or "very valuable." (100% of respondents from small institutions who had attended the class found it "valuable" or "very valuable.")

OJS training

- 38% of respondents overall found OJS training to be "valuable" or "very valuable."
- For those who attended an OJS training course, 60% found it "valuable" or "very valuable."

OCS training

- 38% of respondents overall rated OCS training as "valuable" or "very valuable."
- Excluding respondents who said they had not attended an OCS training course, 60% of respondents rated the class "valuable" or "very valuable."

Intro to DSpace

- 40% of respondents overall rated Intro to DSpace training as "valuable" or "very valuable."
- Excluding respondents who said they had not attended an Intro to DSpace training course, 66% of respondents rated the class "valuable" or "very valuable."

Vireo training
- 43% of respondents rated Vireo training as "valuable" or "very valuable," excluding respondents who said they had not attended a Vireo training course, 74% of respondents rated the class "valuable" or "very valuable."

Additional desired training courses or formats

- The highest number of requests for new training courses were for Advanced DSpace, Data Management, and Metadata.

HELPDESK

Respondents were asked for open-ended feedback on needs for improvement to the TDL Helpdesk.

Feedback on TDL Helpdesk
- 43% of respondents had something positive to say about the Helpdesk, with several indicating that this service has improved over the past year.
- However, more improvement is needed, with nearly as many respondents indicating that communication from the Helpdesk could be better, either in terms of response time or type of communication.

Quick recommendations:

- Consider sunsetting plan for Wikis and Sites/ Blogs in MediaWiki and WordPress
- Strategize preservation option offering for start AY 2012-2013 (DuraCloud)
- Develop additional federated repository options
- Development and customization options for DSpace
- Pilot project for Fedora/ Hydraheads
- Development of Advanced DSpace training and consideration of workshops for metadata
- Begin tracking helpdesk statistics and set plans to improve response rate/ time

TDL Outreach and Promotion

Summary

- Only 63% of respondents who identified as primary or secondary facilitators of TDL services on their campuses feel confident in describing the purpose of the TDL to others.
- The TDL's main email list remains by far the most-used method of communication with the membership, although a majority of respondents had also attended the TDL Forum conference call or the Texas Conference on Digital Libraries.
- The TDL website homepage is the most frequented part of the website and is perceived as the most useful.
- Faculty resistance to Open Access/new publishing models remains a key challenge to recruiting faculty involvement with TDL services. However, improving "user friendliness" of TDL services might be one way to overcome this resistance.
- Fewer than half of respondents said they had discussed NSF data management planning requirements with faculty, though the percentage was higher at larger institutions.
- Few respondents were aware of promotional materials available through TDL, and few said they held regular informational meetings on their campuses during which they promoted TDL services.

TDL VALUE PROPOSITION

Confidence in describing the purpose of the TDL to other people on your campus
- 46% of respondents overall said that they were "confident" or "very confident" in describing the purpose of the TDL to other people on their campus.
- Among small institutions, this number was much higher – 86% were confident or very confident they could describe the TDL's purpose.
- For large institutions – 43.7 were confident or very confident.
- For mid-sized institutions – only 22% were confident or very confident.
- If including only those respondents who are primary TDL liaisons or frequent facilitators of TDL services on their campuses, the number of respondents who are "confident" or "very confident" in describing the purpose of the TDL goes up to 63% (regardless of size of institution). Of those who "rarely or never deal with the TDL or TDL services," 46% are "not at all confident" about describing the TDL's purpose.

TDL WEBSITE, PROMOTIONAL MATERIALS, AND COMMUNICATION CHANNELS

Usefulness of various parts of the TDL website
- The TDL homepage was considered the most useful part of the website, followed by general contact info and helpdesk information.
- The least useful parts of the website were the Usage Scenarios, Publications, and Member Resources sections.
- Large numbers of respondents had not ever visited these sections, indicating that some of the perception of these sections as "not useful" may be driven by lack of awareness.

Channels for receiving info about TDL
- The TDL Listserv (80% of respondents) and "word of mouth (56% of respondents) were by far the most important communication channels for members to get news about TDL.
- The most important social media outlet for receiving TDL information was the TDL blog (16% of respondents). Other forms of social media, such as Facebook and Twitter, were far behind.
- More than half of all respondents (57%) had attended at least one TDL Forum conference call.
- More than half of all respondents (58%) had attended the Texas Conference on Digital Libraries.

Awareness of promotional resources
- 60% of respondents were unaware that they could download promotional materials from the TDL website, and only 13% had used the downloadable materials.
- Of those who had used the materials, 86% found them "very useful" or "useful." Of those who hadn't used them, most either "forgot they were there" or "had not had the opportunity to use them."

PROMOTIONAL ACTIVITIES AT MEMBER LIBRARIES

Frequency of library informational sessions
- While many respondents said their libraries held regular information sessions about library topics, slightly fewer held regular sessions on topics related to TDL services, Open Access, or repositories.

How often would you estimate that you meet with the following campus constituencies as a representative of your library?
- For member survey: The most frequent answer for respondents overall was "as needed."

What has been your greatest challenge in obtaining faculty interest or participation in the use of TDL services on your campus?
Replies to this question included a range of challenges, including:
- Resistance among faculty to Open Access and loyalty to older models of publishing
- Time constraints of both faculty and library staff
- Need for customization services and for services that are extremely user friendly, in order to get faculty to use them

Data management planning
- 44% of respondents overall had discussed changes to requirements for data management implemented by NSF with their faculty, while 46% said they had not.
- For large institutions the number who *had* discussed the changes was higher (50%). For mid-sized and small institutions, the number was significantly lower (31%).

Promotion of TDL services (frequency)
- "As needed" meetings, emails, and presentations were the most frequently used methods for promoting TDL services. Significant numbers of respondents (>30%) said that they "never" promoted TDL using these methods, however.

Do you consider it part of your job description to communicate with fellow librarians and other campus constituencies about the TDL's digital library resources?

- 63% of respondents said they believed that communicating about TDL was part of their job description. This number was highest among respondents from small institutions (86%) and lowest among mid-sized institutions (44%).
- This discrepancy is most likely due to the larger number of respondents from large institutions; that group included respondents from the graduate school, which does not do outreach to faculty about services other than Vireo.
- For those who said it is not part of their job description, some respondents were "just users" of TDL services (i.e. they managed a journal, or used Vireo as part of the graduate office). Other responses focused on challenges of communicating the TDL value proposition to faculty:

Other comments about promotion

"…most ref/instruction librarians who have the most contact (daily) with faculty, feel it isn't part of their job, or that they have too much else to do. Until faculty start taking an interest, librarians won't either.....faculty simply do not care to share their work or feel that it "cheapens" their work, and prefer to publish in established journals, they judge themselves and each other by where they publish. Our university administration (President, Provost) have little knowledge or interest, and until they do, faculty won't."

"There is little understanding about what TDL is, or what services are available. For what we currently use through TDL, there is little general understanding on campus about why we use this, or even what is contained in the IR. This will be a larger aspect of my work moving forward, now that I have begun working more with other departments."

Quick Recommendations:

- Staff at each campus responsible for owning specific TDL services and evangelizing for those services
- Library Directors communicate to staff importance of TDL resources and include digital library components as part of the suite of services offered when speaking with fellow librarians, university staff and faculty researchers
- TDL partners with members to develop customizable marketing materials for electronic distribution, face-to-face contact and print and publicizes materials to membership

TDL Organization

Summary

- The Vireo Users Group was perceived by respondents as valuable – both in terms of participation in the group and the products the group has shared.
- The response to other groups was mixed. The Metadata, Conference Committee, and Preservation groups were not perceived of as particularly valuable by a majority of respondents.
- Some respondents were unaware of any "products" released by the groups or were confused as to the status of the groups.

GROUPS

Respondents were asked to rank the value of their participation on various TDL Working Groups, User Groups, and Committees. They were also asked to rate the output produced by these groups.

- The Vireo Users Group was perceived as the most valuable of all TDL Groups; it was rated "valuable" or "very valuable" by 60% of respondents. No one rated it as "not at all valuable." Likewise the products produced by the VUG were perceived a valuable by a majority of respondents.
- The Metadata Group and Conference Committee were rated as "valuable" or "very valuable" by 38% and 34% of respondents respectively.
- The Preservation Group was rated as "valuable" or "very valuable" by 19%.
- Verbatim comments related to TDL Groups indicated confusion over the status of the Preservation Working Group. Several indicated a need for continued work by the Metadata Group and cited the ETD Metadata standard developed by this group as a useful resource.
- Several respondents voiced a need for better communication and documentation related to group's work and decision-making.
- In response to a question about possible new projects for groups or committees, the most frequent response was a group focused on **repository issues.**
- Other suggestions for new groups included:
    - Shared preservation solutions
    - Metadata standards, e.g. shared repository metadata
    - Digitization projects and support
    - Services evaluation and improvement
    - Marketing & membership
    - Data management

Quick Recommendations:

- TDL Governing Board re-charters existing working groups
- TDL Governing Board charters new groups for
    - o Preservation
    - o Metadata
- TDL releases messaging on status and future of groups