**How to Measure the Impact of Public Libraries: Methodology Guidelines**

These guidelines are provided to encourage proper sampling and estimating, and to avoid extensive measurement costs and level of effort on the part of libraries.

### Underlying principle: Practical validity

To ensure that data are valid (findings can be compared and generalized to populations, programs, or circumstances outside what is being studied), strict adherence to a rigid set of data collection methods, processes, and tools is typically required. This approach is often used in randomized control trials or cross-country studies conducted by a researcher. However, it is not always desirable to follow strict research protocol in other settings.

Practical validityis a balance between what is ideal in a research setting and what is feasible in the other settings. Practical validity emphasizes whether the data collected accurately reflect the phenomenon under investigation, without following research protocol. When measuring the impact of public libraries, the intent is rarely to match the standards of a randomized control trial or cross-country research study. The goal is simply to be confident that the data accurately reflect the perspectives of visitors to public libraries. This is the underlying principle used in the following methodology specifications.

### Data collection instrument

To collect impact measurement data via survey, one can use an electronic survey or a paper survey. Regardless of the survey instrument chosen, libraries should:

* Use random sampling to identify the survey participants
* Provide the survey participants with the survey by handing it to them in paper format or providing them with a computer or tablet and orienting participants to the survey on the screen
* Be available to answer any clarifying questions that arise as participants complete the survey

See *Survey Tools* section below for free and low cost options to administer a survey.

### Frequency of data collection

It is useful to collect impact measurement data at regular intervals – ideally once a year, at minimum – in order to monitor any changes or trends over time. If an online pop-up survey is used, then data can be reviewed on an ongoing basis. This can beneficial, as it provides the library with “real-time” information to inform changes in library services or advocacy efforts.

### Sampling

These sampling guidelines can help to achieve practical validity by ensuring that survey responses reflect the diversity of library visitors.

For those seeking to measure the impact of *multiple libraries or branches* (e.g., national library stakeholders, library associations, individual libraries with multiple branches), it is important to solicit survey responses from visitors at an array of library or branch locations. In this case, please refer to the *Guidelines for establishing a sample of libraries in which to administer the survey,* and then refer to the *Guidelines related to establishing a sample of survey responses* below.

For those seeking to measure the impact of one library/branch (i.e. one location), please skip to *Guidelines related to establishing a sample of survey responses* below.

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| **Guidelines for establishing a sample of libraries in which to administer the survey** |
| **Sample size** | There is no minimum number of libraries in which to administer an impact measurement survey*.* However there is a minimum sample size for the number of survey responses. For more information about survey sample size, see *Sample size* in *Guidelines related to establishing a sample of survey responses,* below.Please choose a sample of libraries that represent the diversity of libraries you seek to measure. Consider the ways that libraries in the local context differ and ensure that diversity is reflected in the sample. For example, if libraries differ by geographic location and size, then include libraries that represent different geographic locations and different sizes in the list of libraries where the survey is administered.  |
| **Geography** | A stratified random sampling approach is recommended for selecting libraries by geography. This ensures that the percent of rural and urban libraries in which the survey is administered matches the statistical make-up of all libraries one seeks to understand. For example, if 20% of libraries being measured are rural, then 20% of the libraries in which the survey is administered should be rural.  This does not mean that 20% of the *survey responses* will be from rural libraries, because administering the survey for an established amount of time in an urban library may yield more responses than administering the survey for the same amount of time in a rural library. |
| **Library size** | A stratified random sampling approach is recommended for selecting libraries by size. This ensures that the size of these libraries matches the statistical make-up of all libraries to be studied. For example, a national library stakeholder could use libraries’ budgets to establish the percentage of libraries that are small, medium, and large and then use these proportions to choose libraries in which to administer the survey.  |
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| **Guidelines related to establishing a sample of survey responses (i.e. individuals to be surveyed)** |
| **Sample size** | A sample size of 400 responses (i.e. 400 library visitors surveyed) will achieve a 95% confidence interval and 5% margin of error for any population size over 10,000. For libraries where the total number of unique library visitors is less than 10,000, please consult a sample size table to determine minimum sample size. For example, visit <http://research-advisors.com/tools/SampleSize.htm>. |
| **Seasonality** | When possible, libraries should administer the survey during seasons likely to get a representative sample of library visitors. For example, if library use changes during the summer months compared to the rest of the year, then it is recommended that libraries avoiding collecting data during summer months. |
| **Days of the week** | It is recommended that libraries consider the different types of visitors likely to use the library on different days of the week. For example, unemployed visitors might be more likely than employed visitors to use the library on weekdays. Libraries are encouraged to administer the survey on a variety of days of the week so that the data collected reflects a diversity of perspectives. |
| **Time of the day** | It is recommended that libraries consider the types of visitors likely to use the library at different times of day. For example, younger visitors might use the library more frequently after school while older visitors might use it in the morning. Libraries are encouraged to administer the survey at a variety of times of day so that the data collected reflects a diversity of perspectives.  |

# General Online Survey Tools (Both Free and Low-Cost)

The following are example online tools one can use to administer a survey.

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| **Title** | **Link** | **Description** |
| **Open Data Kit** | <https://opendatakit.org/about/>  | An open-source suite of tools that helps organizations author, field, and manage mobile data collection solutions. |
| **Kobo Toolbox** | <http://www.kobotoolbox.org/>  | A free, open-source suite of tools for field data collection. Useful for humanitarian workers, aid professionals, researchers, and potentially libraries in developing countries. |
| **Constant Contact** | [www.constantcontact.com](http://www.constantcontact.com)  | Lower cost integrated solution. |
| **FluidSurveys** | <http://fluidsurveys.com/>  | Basic survey tool. |
| **FormSite** | [www.formsite.com](http://www.formsite.com)  | Lower cost integrated solution. |
| **Google Forms** | <https://www.google.com/forms/about/>  | Basic survey tool. |
| **Key Survey** | [www.keysurvey.com](http://www.keysurvey.com)  | More advanced survey package. |
| **LimeSurvey** | [www.limesurvey.org](http://www.limesurvey.org)  | More advanced survey package. |
| **Moodle** | [www.moodle.org](http://www.moodle.org)  | Lower cost integrated solution. |
| **PollDaddy** | [www.polldaddy.com](http://www.polldaddy.com)  | Basic survey tool. |
| **Qualtrics** | [www.qualtrics.com](http://www.qualtrics.com)  | More advanced survey package. |
| **QuestionPro** | [www.questionpro.com](http://www.questionpro.com)  | More advanced survey package. |
| **SoGoSurvey** | [www.sogosurvey.com/](http://www.sogosurvey.com/)  | Basic survey tool. |
| **Survey Monkey** | [www.surveymonkey.com](http://www.surveymonkey.com)  | Basic survey tool. |
| **SurveyGizmo** | [www.surveygizmo.com](http://www.surveygizmo.com)  | Basic survey tool. |
| **Zoomerang** | [www.zoomerang.com](http://www.zoomerang.com) | Basic survey tool. |

# Library-Specific Tools

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| **Impact Survey –** *Note:**currently only available to libraries in the USA* | [www.impactsurvey.org/](http://www.impactsurvey.org/)  | The Impact Survey is the result of a successful research initiative from the University of Washington with support from the Bill & Melinda Gates Foundation. In 2009, the University of Washington Information School conducted [Opportunity for All: How the American Public Benefits from Internet Access at U.S. Libraries](http://impact.ischool.uw.edu/), which was the first large-scale investigation of the ways U.S. library patrons use computers and the Internet at public libraries, why they use it, and how it impacts their lives. The study included a national online survey that yielded over 45,000 responses and four library case studies. It also piloted a local library survey for individual communities.Because the patron survey was such a success, the University of Washington Information School has extended the benefits of the Opportunity for All web survey by making the tested and validated survey available to all U.S. public libraries. Now public libraries can conduct their own Impact Survey at their library at any time. |
| **Counting Opinions** | <http://countingopinions.com/>  | “Counting Opinions provides organizations with innovative, comprehensive, cost-effective ways to capture, manage and measure performance data, including open-ended customer feedback, qualitative and quantitative data, trends, benchmarks, outcomes and peer comparisons.” |

*The Bill & Melinda Gates Foundation and Global Libraries do not officially endorse the preceding tools and products. They are provided as references and potential resources.*