

## Appendix A: Survey Questionnaire<sup>1</sup>

### *Introduction*

1. Which ILS does your library use?

2. How would you rate your satisfaction with your ILS overall?

1 – very dissatisfied	2 – somewhat dissatisfied	3 – neither satisfied nor dissatisfied	4 – somewhat satisfied	5 – very satisfied	don't know/ no answer
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3\*. Before your ILS was selected, did the selector(s) analyze costs and benefits of ILS alternatives?

- Yes, this ILS was selected as most cost-effective.
- No.
- Don't know/no answer
- Yes, but this ILS was selected for other reasons (What reasons? Please specify.)

4\*. Please rank in order the top 5 reasons your library chose this ILS. Choose "1" for most important, "2" for second most important, etc.

- security
- combined with other incentives
- desirable features/functionality
- trusted brand name
- affordable price
- good technical support
- portability
- ease of use
- customizability
- we used this ILS or vendor before
- freedom from vendor lock-in
- scalability
- other (please specify and rate as 1 - 5)
- don't know/no answer

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<sup>1</sup> Questions marked with an asterisk (\*) were not asked of individual Evergreen libraries, but were asked of the Evergreen consortium director, and all other respondents.

## ILS Survey Questionnaire

5. How would you rate your satisfaction with your ILS on the following items?

1 – very dissatisfied	2 – somewhat dissatisfied	3 – neither satisfied nor dissatisfied	4 – somewhat satisfied	5 – very satisfied	don't know/ no answer
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- portability
- scalability\*
- ease of use
- affordability\*
- customizability
- features/functionality
- technical support
- security
- interoperability

6\*. Is your ILS hosted on site at your institution or off site?

on site/parent site	off site/service provider	don't know/no answer
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7\*. Who provides the following items for your library's ILS?

internal staff	external contractor	both	don't know/no answer
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- Installation
- Documentation
- Training
- Support
- Maintenance

### *Customization<sup>2</sup>*

8\*. Has your library customized (or sponsored customization of) the ILS source code?

yes	no	don't know/no answer
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9\*. Were your customizations

A) limited to modifying the appearance of web pages (in HTML or CSS) such as to show your library name, logo, etc, or to configuring ILS options such as branch libraries and circulation policies,

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<sup>2</sup> Customization questions 9 and 10 were asked as an email follow-up for Koha respondents.

## ILS Survey Questionnaire

B) or did your customizations involve changing the source code (in Perl, PHP, or another programming language)

C) or something else?

D) don't know/no answer

10\*. Can you please briefly describe your customization?

### *Installation*

The process of ILS installation includes configuration of ILS catalog format and circulation policies, and migration or data entry of the catalog and user accounts.

11\*. Were you involved in the installation of your ILS, either directly (installing it yourself) or indirectly (having others install it)?

yes

no

12\*. How smoothly did the installation of your ILS go? (The process of ILS installation includes configuration of ILS catalog format and circulation policies, and migration or data entry of the catalog and user accounts.)

1 – with extreme difficulty	2 – with some difficulty	3 – neither smoothly nor with difficulty	4 – somewhat smoothly	5 – extremely smoothly	don't know/no answer
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13\*. Approximately how long did it take to install and configure the ILS, including catalog and user account migration? Please enter the approximate number of days.

14\*. How acceptable to you was the amount of time it took to install the ILS?

1 – very unacceptable	2 – somewhat unacceptable	3 – neither acceptable nor unacceptable	4 – somewhat acceptable	5 – very acceptable	don't know/no answer
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15\*. Do you have any comments about the ILS installation process or how it could be improved?

ILS Survey Questionnaire

*OPAC*

16. The Online Public Access Catalog (OPAC) contains a search engine to the catalog. Are you familiar with your ILS's OPAC?

yes

no

17. Regarding the ILS's OPAC search engine, how would you rate its ease of use?

1 - very hard to use	2 - somewhat hard to use	3 - neither easy nor hard	4 - somewhat easy to use	5 - very easy to use	don't know/no answer
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18. How would you rate the OPAC search engine's completeness of features?

1 - lacks all features we need	2 - lacks most features we need	3 - has some but lacks some	4 - has most features we need	5 - has all features we need	don't know/no answer
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19. What is your perception of how easy it is for patrons to make self-service requests online for renewals and holds?

1 - very hard	2 - somewhat hard	3 - neither easy nor hard	4 - somewhat easy	5 - very easy	don't know/ no answer
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*Circulation and Patron Accounts*

The following questions are about your daily experience using your library's ILS.

20. The circulation and patron accounts modules may be used to process book loans, returns, renewals, holds, to enter new patron accounts, resolve fines, or edit patron information. Are you familiar with your ILS's circulation and patron accounts modules?

- Yes.
- No, I use them on average less than two hours per week.
- No, our ILS does not have circulation and patron accounts modules.\*
- No, our library is noncirculating.\*

21. How would you rate the ease of use of the circulation and patron accounts modules?

1 - very hard to use	2 - somewhat hard to use	3 - neither easy nor hard	4 - somewhat easy to use	5 - very easy to use	don't know/no answer
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## ILS Survey Questionnaire

22. How would you rate the completeness of features of the circulation and patron accounts modules?

1 - lacks all features we need	2 - lacks most features we need	3 - has some but lacks some	4 - has most features we need	5 - has all features we need	don't know/no answer
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23. How easy is it for staff to process loans and returns in the ILS?

1 - very hard	2 - somewhat hard	3 - neither easy nor hard	4 - somewhat easy	5 - very easy	don't know/no answer
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24. How easy is it for staff to process requests for renewals and holds in the ILS?

1 - very hard	2 - somewhat hard	3 - neither easy nor hard	4 - somewhat easy	5 - very easy	don't know/no answer
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25. How easy is it for staff to do tasks such as adding a new patron account, resolving a fine, or updating a patron's address in the ILS?

1 - very hard	2 - somewhat hard	3 - neither easy nor hard	4 - somewhat easy	5 - very easy	don't know/no answer
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### *Cataloging*

26. Are you familiar with your ILS's cataloging module?

- Yes.
- No, I use it on average less than two hours per week.
- No, our ILS does not have a cataloging module.\*

27. How would you rate the ease of use of the cataloging module?

1 - very hard to use	2 - somewhat hard to use	3 - neither easy nor hard	4 - somewhat easy to use	5 - very easy to use	don't know/no answer
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28. How would you rate the completeness of features of the cataloging module?

1 - lacks all features we need	2 - lacks most features we need	3 - has some but lacks some	4 - has most features we need	5 - has all features we need	don't know/no answer
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## ILS Survey Questionnaire

29. How easy is it to add original catalog records from scratch in the ILS?

1 - very hard	2 - somewhat hard	3 - neither easy nor hard	4 - somewhat easy	5 - very easy	don't know/ no answer
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30. How easy is it to do copy cataloging in the ILS, that is, to do tasks such as retrieving catalog records from OCLC or Library of Congress and adding local holdings information?

1 - very hard	2 - somewhat hard	3 - neither easy nor hard	4 - somewhat easy	5 - very easy	don't know/ no answer
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### *Serials*

31\*. The serials module may be used to manage journal or magazine subscriptions. Are you familiar with your ILS's serials module?

- Yes.
- No, I use it on average less than two hours per week.
- No, our ILS does not have a serials module.

32\*. How would you rate the ease of use of the serials module?

1 - very hard to use	2 - somewhat hard to use	3 - neither easy nor hard	4 - somewhat easy to use	5 - very easy to use	don't know/no answer
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33\*. How would you rate the completeness of features of the serials module?

1 - lacks all features we need	2 - lacks most features we need	3 - has some but lacks some	4 - has most features we need	5 - has all features we need	don't know/no answer
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### *Acquisitions*

34\*. The acquisitions module may be used to manage book or materials orders. Are you familiar with your ILS's acquisitions module?

- Yes.
- No, I use it on average less than two hours per week.
- No, our ILS does not have an acquisitions module.

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35\*. How would you rate the ease of use of the acquisitions module?

1 - very hard to use	2 - somewhat hard to use	3 - neither easy nor hard	4 - somewhat easy to use	5 - very easy to use	don't know/no answer
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36\*. How would you rate the completeness of features of the acquisitions module?

1 - lacks all features we need	2 - lacks most features we need	3 - has some but lacks some	4 - has most features we need	5 - has all features we need	don't know/no answer
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### *Documentation*

37. ILS documentation may include manuals, documents, or help menus in your ILS. Have you read any of your ILS documentation?

yes

no

38. How would you rate your satisfaction with your ILS documentation (which may include manuals, documents, or help menus)?

1 - very dissatisfied	2 - somewhat dissatisfied	3 - neither satisfied nor dissatisfied	4 - somewhat satisfied	5 - very satisfied	don't know/ no answer
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39. How would you rate the completeness of your ILS documentation?

1 - very incomplete	2 - somewhat incomplete	3 - neither complete nor incomplete	4 - somewhat complete	5 - very complete	don't know/ no answer
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40. Do you have any comments about the documentation or how it could be improved?

## ILS Survey Questionnaire

### *Support, Maintenance, and Reliability*

41. *Support* refers to the help you need when you are troubleshooting or seeking clarification on how to use a feature that is new to you. How would you rate your satisfaction with your ILS support?

1 – very dissatisfied	2 – somewhat dissatisfied	3 – neither satisfied nor dissatisfied	4 – somewhat satisfied	5 – very satisfied	have not received support
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42. Do you have any comments about your ILS support or how the support could be improved?

43\*. *Maintenance* refers to periodic backups, patches, and upgrades. How would you rate your satisfaction with your ILS maintenance?

1 – very dissatisfied	2 – somewhat dissatisfied	3 – neither satisfied nor dissatisfied	4 – somewhat satisfied	5 – very satisfied	don't know/ no answer
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44. How would you rate your satisfaction with your ILS in terms of reliable, trouble-free operation?

1 – very dissatisfied	2 – somewhat dissatisfied	3 – neither satisfied nor dissatisfied	4 – somewhat satisfied	5 – very satisfied	don't know/ no answer
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### *ILS Problems*

45. Have you had any problems, such as software bugs, with your ILS?

- Yes, we have had some ILS problems.
- Yes, but not sure if the problem was due to something else.
- No, we have had no ILS problems.

46. What types of ILS problems have you had (not including problems caused by underlying components such as network failure)? Select all that apply.

- Lapse in service
- Data loss
- Problems with OPAC/search engine
- Problems with circulation module
- Problems with cataloging module

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- Problems with serials module\*
- Problems with acquisitions module\*
- Security breach
- Other (please specify)

### *Library Size*

47\*. How many books and serial volumes are in your library's collection? Your best estimate is fine.

48\*. What is the population of your library's service area? Your best estimate is fine.

### *Costs*

Can you please estimate the following costs in U.S. dollars?

49\*. What was the cost of any new hardware, software, or network equipment required before installing your ILS?

The next two questions break down the ILS costs by initial and perpetual costs.

50\*. The initial cost of the ILS may include the software, license fees, installation, configuration, migration of data from previous ILS, documentation, and training. What was the initial cost of your ILS?

51\*. The perpetual costs of the ILS may include support contracts, maintenance, and license fees. What is the annual cost of your ILS?

The next two questions further break down the initial ILS cost into materials and labor costs.

52\*. The initial materials cost may include software, documentation, and license fees. Can you please estimate the initial materials cost of your ILS?

53\*. The initial labor cost of your ILS may include installation, support, and training. Can you please estimate the initial labor cost of your ILS?

The answer ranges for the cost questions, Q49–Q53, are:

- \$0 - \$500 USD
- \$501 - \$1,000 USD
- \$1,001 - \$2,500 USD
- \$2,501 - \$5,000 USD

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- \$5,001 - \$7,500 USD
- \$7,501 - \$10,000 USD
- \$10,001 - \$25,000 USD
- \$25,001 - \$50,000 USD
- \$50,001 - \$75,000 USD
- \$75,001 - \$100,000 USD
- \$100,001 - \$500,000 USD
- \$500,001 - \$1,000,000 USD
- \$1,000,001 - \$5,000,000 USD
- \$5,000,001 - \$10,000,000 USD
- over \$10,000,000 USD
- included in cost of ILS (Q. 47 only)
- don't know/no answer
- can give a closer estimate

### *Demographics*

54. What is the name of your library?

55. What type is your library?

public      academic      special      school      other (please specify)

56. Where is your library located?

City:

State/Province:

Country:

### *Finish*

57. Do you have any comments about your library's ILS or how it could be improved?