
“We’re all doomed!”

The SCONUL Top Concerns Survey 2009



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INTRODUCTION

Each year, SCONUL carries out a brief, web-based survey of the top concerns of SCONUL directors and librarians. As well as providing a snapshot of the issues which fill up our mailboxes, the Top Concerns survey is a useful pointer for the development of SCONUL strategies so that these match our members’ priorities.

Since 2007, the SCONUL Top Concerns survey has used the e-inform web survey software developed by Priority Research Ltd. SCONUL is very grateful to Priority Research Ltd for their continuing involvement and support in library-based surveys.

To make the survey even quicker and simpler to complete in 2009, a previous question on top concerns over the last three months was omitted. Instead, respondents were asked to concentrate on the top issues and priorities over the coming twelve months. As well as being more helpful for strategic planning, it had been found that responses to the two sets of questions were very similar.

There were 105 responses to the latest Top Concerns survey, which was circulated to the SCONUL mailing list in late March 2009. The survey was available for completion until mid-April. The response rate was slightly lower than the 115 respondents for the 2008 survey, but still represents just under two-thirds of SCONUL institutional members in the UK and the Republic of Ireland¹.

SUMMARY OF RESULTS

Given the dramatic changes in the world economy over the last year, it is unsurprising that the predominant concern of SCONUL directors and librarians over the next twelve months is funding and financial management. Issues like library budgets and the costs of resources were a high or a very high concern of 97% of survey respondents. Funding was the top concern of all of the sub-groups within the survey, reflecting current uncertainties over higher education funding across the different countries, the types and size of institution and the differing organisational structures within the SCONUL membership.

The three top concerns in the 2009 survey were the same as in the 2008 survey. However, there was a marked difference in their ranking; the 2008 rating is given in brackets below:

- Funding and financial management: 97% (84%)
- E-environment: 91% (84%)
- Space and buildings: 79% (94%)

An additional question in the 2009 survey covered space and buildings, which was the top concern in last year's survey. Within this area, the three top concerns were:

- Re-focussing and diversifying learning spaces: 76%
- Planning a refurbishment of a current library/information centre: 68%
- Providing informal social learning and networking facilities: 62%

As usual, the full report of the survey along with the datafield summary and the full text of the questionnaire is available on the SCONUL website (www.sconul.ac.uk).

TOP CONCERNS OVER THE NEXT TWELVE MONTHS

The top concerns of SCONUL directors and librarians over the coming year are shown in Figure 1.

Figure 1: Top Concern Percentages for the Next Twelve Months



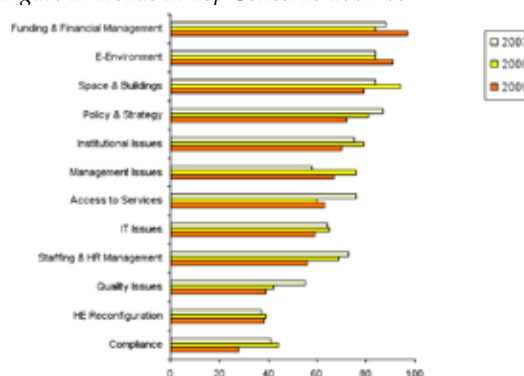
The 97% of respondents rated funding and financial management as either a very high or a high concern. This is the highest rating for any concern over the last three years and reflects the worrying financial and funding prospects over the next year or so. Like Private Frazer in *Dad's Army*, played by the late, great John Laurie, the collective view may be that 'we're all doomed!'. This was also shown in some of the free-text qualitative comments to the final question in the survey:

- *Affordability and the economic downturn are affecting priorities in the institution.*
- *The biggest single issue over the next year is likely to be dealing with the fall out from the pound's collapse and the subsequent rise in the cost of journals.*
- *Survival! Budgets will be cut, staffing will be cut.*

The E-environment continued to grow as an issue, with 91% of respondents rating this as either a very high or a high concern over the next year, compared to 84% in 2008. Space and buildings dropped from 94% last year to 79% in 2009. This might also be a reflection of the uncertainties of future capital investment plans in many institutions.

TRENDS IN SCONUL TOP CONCERNS

Figure 2: Trends in Top Concerns 2007-09



As the SCONUL Top Concerns survey has been run in the same format for the last three years, it may be possible to discern some trends in our top concerns. Given the relatively small sample sizes, some caution is needed in this trend analysis, which should be regarded as indicative rather than definitive.

The trends over the last three years appear to be:

- Most concerns have a fairly constant rating. Like the poor, issues like management and IT are always with us.
- Funding issues and the E-environment have increased as concerns over the last three years
- Correspondingly, quality and compliance issues appear to have decreased as major concerns over the same period. Staffing and HR management issues have also diminished: this may reflect the gradual implementation of HERA (Higher Education Role Analysis) over this period.

UCISA TOP CONCERNS

Our sister organisation UCISA (Universities and Colleges Information Systems Association) also carries out a biennial Top Concerns survey of higher education IT directors and representatives². This is a more detailed survey, with a rather different methodology. It builds up a larger number of top concerns (twenty-eight in the latest January 2009 survey) from free text suggestions from UCISA members. Respondents are then asked to rank their top ten concerns from the list of twenty-eight in terms of four differing areas:

- Strategic importance
- Emerging issues
- Using the most senior IT/IS management time
- Using the most IT/IS resources

The four sets of rankings are then merged into a combined top ten concerns. Paralleling SCONUL members' concerns over the financial future, the top rated concern in the 2008-09 UCISA survey was *Funding and sustainable resourcing of IT*. Figure 3 compares the top ten concerns from the most recent SCONUL and UCISA surveys.

Figure 3: SCONUL and UCISA Top Ten Concerns in Rank Order

Ranking	SCONUL	UCISA
1	Funding & financial management	Funding & sustainable resourcing of IT
2	E-environment, including e-resources & e-learning	Business systems to support the institution
3	Space & buildings	Organisational change and process improvement
4	Policy & strategy	IT strategy & planning
5	Institutional issues	Service availability and resilience
6	Management issues	E-learning
7	Access to services	IT/IS service quality
8	IT issues	Governance of IT
9	Staffing & HR management	Development of an architected, enterprise-wide IT infrastructure
10	Quality Issues	Data centres

SPACE AND BUILDINGS TOP CONCERNS

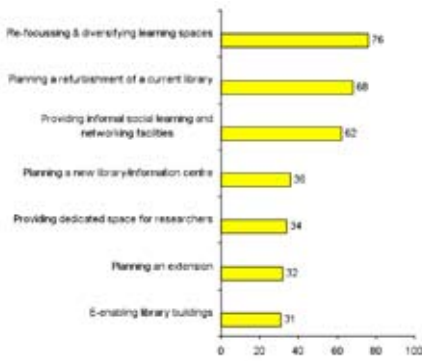
As space and buildings had been the top rated concern in the 2008 SCONUL survey, some additional questions on this area were added to this year's survey. Within this area, the three highest rated concerns were:

- Re-focussing and diversifying learning spaces (a high concern of 76% of respondents)
- Planning a refurbishment of a current library/information centre (68%)
- Providing informal social learning and networking facilities (62%)

Additional free-text comments included:

- *Adapting current library space to accommodate additional services*
- *Making the case for an extension*
- *Integration with other student services*

Figure 4: Space & Buildings: Top Concerns Over the Next Twelve Months

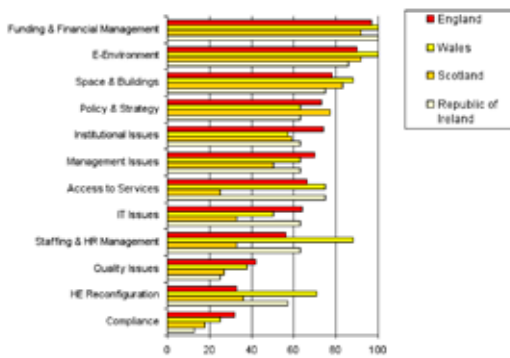


TOP CONCERNS OF SUB-GROUPS

The survey included some demographic questions. Respondents were asked to indicate their home country, their type of institution (based on the SCONUL *Statistical Return*), the size of their institution in terms of student FTEs and their type of organisation (again, based on the categorisation in the SCONUL *Statistical Return*).

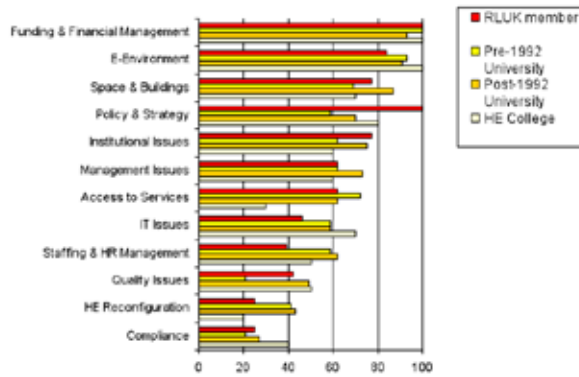
This allowed cross-tabulation of this data against the top concerns ratings over the next twelve months. The demographic response rates broadly matched the make-up of SCONUL members but, inevitably, some of the sample sizes were small, so there should be a cautious interpretation of these results.

Figure 5: Top Concerns Over the Next Twelve Months by Country



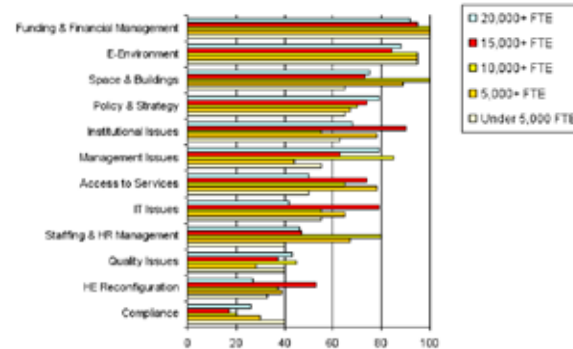
Response rates by country broadly matched the number of SCONUL members in each country but the sample size from Northern Ireland was too small to be included. Most responses were very similar to the overall ratings for these issues. Minor variations were attributable to policy differences across the countries; for example, Higher Education reconfiguration remains a significant issue in Wales.

Figure 6: Top Concerns Over the Next Twelve Months by Type of Institution



The categorisations are based on the four broad groupings used in the SCONUL *Statistical Return*. Again, the similarities in the ratings for issues over the next twelve months are striking.

Figure 7: Top Concerns Over the Next Twelve Months by Size of Institution



Despite the very wide variations in size of institution across the SCONUL membership, the same broad concerns appear to be shared between the largest and the smallest institutions.

Figure 8: Top Concerns Over the Next Twelve Months by Type of Service



The categorisation of organisational structure is based on the SCONUL *Statistical Return* once again. As was suggested by the UCISA survey,

both separate library and converged services have broadly similar concerns.

CONCLUSION

For the last three years, the SCONUL Top Concerns survey has provided useful input into deciding SCONUL strategic priorities. The 2009 survey showed once again that SCONUL directors and librarians have to balance an increasingly complex and demanding set of issues.

Unsurprisingly, the funding situation this year meant that finance was a dominant concern for the next twelve months. As in previous surveys, this was also the case across the various sub-groups within the SCONUL membership. It also paralleled the primary concern in the UCISA Top Concerns survey, carried out in January 2009. We may all be increasingly gloomy about our financial futures, but we can take solace in the fact that we are not alone in our pessimism.

REFERENCES

- 1 C.M. West 'What's in our in-trays? The SCONUL top concerns survey 2008', SCONUL Focus, 44, 2008, pp41-45 <http://www.sconul.ac.uk/publications/newsletter/44/15.pdf>
- 2 UCISA Top Concerns Survey 2008 (Oxford: UCISA, 2009) <http://www.ucisa.ac.uk/publications/topconcerns08.aspx>

(Web sites accessed 28 May 2009)