

CIPFA Research

Survey of Visitors to UK Archives 2014 Manual of Guidance

A guide to conducting a survey of visitors to archive's search-rooms

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Introduction

The survey of visitors to archive services is ostensibly a survey of visitors to the search-room. Consequently the point at / from which the questionnaire could be issued includes:

- Once the client is settled within the search-room
- At the desk
- A specifically created set-up point for the duration of the survey
- A point of entry, e.g. the reception or foyer.

Some key points to note:

- Choose customer friendly staff to approach clients, rather than those who maybe reluctant to do so
- **All** visitors to the search room(s) must be approached and invited to take part (provided they are aged 17+)
- Ensure continuity during staff handover, so that staff are aware who has been approached and who has not
- **Provide a drop-off box for completed surveys**, so that the client can retain their anonymity if required
- Recording some details of those who refuse to take part – see specific guidance on this in the **keeping count** section
- That questionnaires are only issued during normal public opening hours
- That **the emphasis is on your archive** rather than any national imperative to take part.

Tips / advice on approaching search room visitors:

- In terms of the approach taken to invite your clients to take part we would recommend that:
 - You consider what is appropriate to each person, i.e. whether you should take a light-hearted approach such as: *"We are asking all those who visit the search-room to take part in a survey, rating our facilities and services, as this really helps us to monitor and improve the services we offer"*
 - You could add, if you think it might be of concern to the individual: *"It is completely anonymous and there is a box [point to it] to return it to"*
 - Adding if you wish: *"and please do it today!"*.

We would encourage you to consider other approaches as you will undoubtedly tire from the repeated usage of the same spiel!

To pre-warn your clients we also recommend the use of a poster to pre-promote your survey. It should go up about 2 to 3 weeks before your survey starts and be there for the whole duration. A suggested form of words is as follows, see overleaf...

We are undertaking a survey of users to this archive between Monday, 12 May 2014 and Sunday, 6 July 2014¹

During this period a member of staff will invite you to take part.

Your help is appreciated to monitor and improve services.

[HEAD OF SERVICE / CONTACT DETAILS]

¹ Amend as applicable

Keeping count

We need to be able to determine how successful your survey is based on two criteria, these are:

- To what extent does the profile of respondents (by age group and gender) match that of visitors to the search room, i.e. is the survey subject to any bias
- What proportion of visitors agree to take part and what impact does that have on the statistical validity of the results.

You must consider the following actions mandatory, i.e. a failure to undertake these steps will result in your survey being qualified².

1. When **a respondent does not wish to participate** in the survey, i.e. they refuse to take part, **you need to record their gender and age group on a rejection sheet**. You'll find a copy of this in the appendices. If you are not sure as to which age group they fall into then make an educated guess, we do not expect you to ask them!
 - a. The rejection sheet is broken down by 5 age groups (under 25, 25 to 44, 45 to 64, 65 to 74, 75 or older) and gender (male and female). **All you need to do is mark each refusal in the style of a 5 bar gate system**. At the end of the week you can complete the totals column
 - b. Adopting this approach means that any questionnaire that has been refused can be re-issued, thus saving on unnecessary printing / wastage
2. **Every time someone agrees to take part the act of issuing a questionnaire counts as a proxy / substitute for a unique visitor count. You do need to keep a tally of how many people agreed to take part each day.**
 - a. The simplest way to do this is to note the first questionnaire issued on that day and then the last questionnaire, provided of course they are issued in sequential order. If they are not then you need to find a different mechanism to record this, for example if you are issuing questionnaires from different locations within the building
 - b. You may find that a number of people agree to take part but then never return the questionnaire. Hopefully this should happen infrequently and ideally not at all!
 - c. **A log sheet is included in the appendices for you to tell us how many questionnaires you issued**, i.e. those who agreed to take part; how many completed questionnaires you obtained and how many for each age group / gender combination who refused to take part.

And finally, some archives attract **visitors from outside of the UK**. In question 17 we ask that they write this down, instead of a postcode. **Where this occurs you will need to code this response using the list of codes included within the appendices of this guidance**, starting on page 13. This can be done at the end of each day or week.

² Being qualified means that we, CIPFA Research, had sufficient concerns about certain aspects of the survey that render it invalid

Other considerations

The survey window opens on Monday, 12 May, 2014 and closes on Sunday, 6 July, 2014. The minimum length you can run your survey for is one week, the maximum is 8 weeks. Ideally you should run your survey over a continuous period of time but this is not absolutely essential.

If someone has taken part in the survey elsewhere then they can still take part in your survey. However for some visitors they may prefer not to, in this case you must record them as a refusal to participate. We do however only expect someone to respond only once at each archive / office, this may be an issue if you are conducting your survey over an extended period of time. It may prove challenging to know who has and who hasn't taken part so be mindful of this!

Each questionnaire should only be completed by one person. That person must be aged 17 or older. Do not approach, or invite to take part in your survey, anyone who appears to be younger than 17 years old³.

Be careful what people are using to complete the survey. If they are using pencil then it should be HB, if pen then either: black, blue or green will be fine⁴. Essentially you need to ensure that any mark they make on the questionnaire does not find itself erased or impossible to interpret.

The questionnaire for the 2014 visitor survey is, we believe, radically different to its predecessors. The emphasis is very much on the concept of a journey that a 'typical' visitor to an archive may experience. We think that those making use of archive services are becoming increasingly sophisticated, given the advanced resources (web sites) now available to them. In these cases the demands on archive staff grow increasingly complex and the requirement has shifted from simply acting as a signpost to information to that of assisting them beyond this point. We hope that in adopting this concept of a journey these increasing levels of demand will be captured in a meaningful way.

A number of satisfaction questions have been retained and for the most part ask respondents to tick an applicable box, e.g. very good. However for some key questions, regarding the staff and overall satisfaction, we ask them to provide a rating out of 10. Do bear in mind that for these 'out of 10' questions the lowest score they can give is 1 (one) and the highest a ten, a zero is treated as 'not answered'. The instruction regarding this is included on the front page of the questionnaire and with each individual question to make sure they don't forget this! A copy of the questionnaire is included in the appendices.

CIPFA Research offer a printing and scanning service. If you wish to take advantage of the scanning service then you must also allow us to print your questionnaires and you must not return any photocopied questionnaires to us for scanning. For more details about these services, including the charges, please contact us at research@cipfa.org

³ There are strict guidelines that apply when surveying children and young people, none of which have been implemented within the method being followed here

⁴ If you are making use of the CIPFA Research scanning services then these guidelines must be followed

Appendices

Rejection sheet

	Gender:		Totals:	
	Male	Female	Male	Female
Age group:				
Under 25				
25 to 44				
45 to 64				
65 to 74				
75 or over				

Log sheet

	Archon code:	
	Survey start and end date, e.g. 12-May to 01-June	
	Total number of issued questionnaires:	
	Total number of completed questionnaires:	
	Under 25:	
	25 to 44:	
Male	45 to 64:	
	65 to 74:	
Refusals (from rejection sheet, total number)	75 or over:	
<i>[If there are no refusals amongst any of these groups please enter a zero (0) to signify this, rather than leave blank]</i>	Under 25:	
	25 to 44:	
Female	45 to 64:	
	65 to 74:	
	75 or over:	

Sample questionnaire



Public Services Quality Group

<<name_of_archive>>

You have been invited to take part in this survey of users of archive services.

- We estimate that it should take you approximately ten to fifteen minutes to complete this survey
- You only need to answer those questions that apply to you
- You should only take part if you are over 16 years of age
- There are instructions on how to answer provided with each question. Most ask you to put an X in a box or to provide a mark out of ten, **where 10 is the highest and 1 is the lowest score**, like this:

8 out of 10

- We promise that the information you provide will be kept anonymous and you will not be identified in any way
- If you have any questions about this survey or require any assistance in completing it do ask a member of staff for help
- Once you have finished the survey, either return the questionnaire to a member of staff or place it in the box provided.

Thank you for your help.

ARCHON CODE	REF NO
<input type="text"/>	<input type="text"/>

SECTION A: THE REASON FOR YOUR VISIT

1. (a) Is this your first visit to **any** archive? [Please mark X in one box]

Yes No

(b) If No at (a) above, have you visited this archive before?

Yes No

(c) If Yes at (b) above, are you a regular user of this archive?

Yes No

2. (a) Why are you visiting this archive today?

[Please mark X in all boxes that apply]

Academic research

Architectural / building / site research

Family history research

Military research

Local history research

General browsing / familiarising myself with the archive

Accompanying a friend / family member who is undertaking research

To find information relating to my work

To gather information for a talk / publication / presentation

To find information for the organisation I volunteer at

Am in the area / here on holiday / have time

Other, please specify:

(b) Please tell us more information about your research interest or the purpose of your visit

3. What, if any, of the following did you do to prepare for your visit today?
 [Please mark X in all boxes that apply]

Went online to check archive opening times / find directions etc.	<input type="checkbox"/>
Researched family history resources / family tree	<input type="checkbox"/>
Asked friends / relatives for information	<input type="checkbox"/>
Emailed / telephoned archive	<input type="checkbox"/>
Conducted online research	<input type="checkbox"/>
Searched archive's online catalogue to find records / reserve documents	<input type="checkbox"/>
Reviewed my research / undertook background reading	<input type="checkbox"/>
Visited library / museum / other organisation	<input type="checkbox"/>
Visited another archive	<input type="checkbox"/>

Other, please specify:

SECTION B: OUR STAFF, SERVICES & FACILITIES

4. Please mark our staff out of 10 for the following aspects; where 10 is the highest and 1 is the lowest score

If you did not have any contact with the archive staff, please leave this section blank.

Availability of staff	<input type="text"/>	out of 10
Attitude of staff	<input type="text"/>	out of 10
Quality and appropriateness of the staff's advice	<input type="text"/>	out of 10

5. How satisfied are you with the following:

If you did not use a service, please select the "Don't know / not applicable" option or leave blank

[Please mark X in one box in each row]

	Very satisfied	Fairly satisfied	Neither satisfied nor dissatisfied	Not very satisfied	Not at all satisfied	Don't know / not applicable
Opening hours	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ease with which you found us	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appearance / upkeep of the building	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Physical access to and in the building	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lockers / toilets / rest or refreshment area	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Welcome / reception	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. Please rate the following services used during your visit to this archive

If you did not use a service, please select the "Don't know / not applicable" option or leave blank

[Please mark X in one box in each row]

	Very good	Fairly good	Neither good nor poor	Poor	Very poor	Don't know / not applicable
Availability of our computers	<input type="checkbox"/>					
Speed of our computers	<input type="checkbox"/>					
Usability of our online catalogue	<input type="checkbox"/>					
Quality of our online catalogue	<input type="checkbox"/>					
Quality of our other online resources	<input type="checkbox"/>					
Access to other online resources	<input type="checkbox"/>					

7 (a) Please rate how satisfied you are with the following services.

If you did not use a service, please select the "Don't know / not applicable" option or leave blank

[Please mark X in one box in each row]

	Very satisfied	Fairly satisfied	Neither satisfied nor dissatisfied	Not very satisfied	Not at all satisfied	Don't know / not applicable
Availability of seating	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality of our paper catalogues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality of our other paper resources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Document ordering system	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Document delivery system	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Microfilm and microfiche facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our copy services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Self-service photography	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

(b) Regarding Welsh language provision, how satisfied are you with the following services? (For users of Welsh archives only)

	Very satisfied	Fairly satisfied	Neither satisfied nor dissatisfied	Not very satisfied	Not at all satisfied	Don't know / not applicable
Verbal communication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Printed catalogues or resources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Online catalogue or resources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8. Please mark the archive overall out of 10; where 10 is the highest and 1 is the lowest score

Overall, how do you rate this archive? out of 10

SECTION C: YOUR VISIT

9. What was your primary method of travel to this area / archive today? [Please mark X in one box]

Private transport, e.g. car, motorbike

Public transport, e.g. bus, train, metro / tram

On foot

Bicycle

Other, please specify:

10. What else are you doing in the area today, in addition to visiting this archive? [Please mark X in all boxes that apply]

Nothing else

Staying with relatives / friends

Paying for overnight accommodation

Eating out

Attending conference / event

Meeting with a society / group, e.g. in relation to my research topic

Visiting other places of interest

Using local transport

Returning to work

Other, please specify:

11. Approximately how many hours have you spent at this archive today? [Please write in to the nearest whole hour, e.g. 4]

12. Please write below if you wish to add anything about your experience at this archive today:

SECTION D: OUTCOMES

13. What benefits have you experienced from using archives? Please indicate whether you agree or disagree with the following statements:

[Please mark X in one box in each row]

	Agree	Disagree	Not applicable
I improved my knowledge in an area of interest	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I developed new skills or improved existing skills (in research, use of ICT, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I have a greater understanding of my community, its history and people	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I enjoyed myself	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am inspired to find out more	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

14. If you are using archives on behalf of an organisation (school / business / voluntary body) what will be the benefits?

SECTION E: ABOUT YOU

15. Your gender?

[Please mark X in one box]

Male

Female

Prefer not to say

16. Your age?

[Please write in, e.g. 53]

 Prefer not to say

17. (a) If you are a UK resident, what is your postcode?

[Please write in]

(b) If not a UK resident, what is your country of residence?

[Please write in]

Staff please add country code:

(c) Prefer not to say

18. What is your ethnic group?

[Please mark X in one box]

Asian

Black

Mixed

White

Any Other, please state:

Prefer not to say

19. Please indicate if you have a disability or condition in any of the following areas:

[Please mark X in all that apply]

None / not applicable

Mobility, e.g. walking short distances or climbing stairs

Hearing, e.g. deafness or partial hearing

Vision / eyesight, e.g. blindness or partial sight

Dexterity, e.g. using a keyboard

Learning / understanding / concentrating

Mental health

Memory

Other, please state:

Prefer not to say

Thank you for taking part in this survey, your response is much appreciated

Country codes

Source: ISO. To aid searching, some entries are duplicated, for example the entry for Hong Kong can be found as either *China, Hong Kong Special Administrative Region* or as *Hong Kong, Special Administrative Region of China*. Use of the codes will ensure that we are able to analyse responses to this question and avoids problems with different organisations collecting the data in differing formats. For those who are undertaking the data capture in-house you could decide to code the responses at the point of data capture rather than following completion of the survey.

Country	Code	Country	Code
Afghanistan	4	Belize	84
Åland Islands	248	Benin	204
Albania	8	Bermuda	60
Algeria	12	Bhutan	64
American Samoa	16	Bolivia (Plurinational State of)	68
Andorra	20	Bonaire, Saint Eustatius and Saba	535
Angola	24	Bosnia and Herzegovina	70
Anguilla	660	Botswana	72
Antigua and Barbuda	28	Brazil	76
Argentina	32	British Virgin Islands	92
Armenia	51	Brunei Darussalam	96
Aruba	533	Bulgaria	100
Australia	36	Burkina Faso	854
Austria	40	Burundi	108
Azerbaijan	31	Cambodia	116
Bahamas	44	Cameroon	120
Bahrain	48	Canada	124
Bangladesh	50	Cape Verde	132
Barbados	52	Caribbean	29
Belarus	112	Cayman Islands	136
Belgium	56	Central African Republic	140

Country	Code
Chad	148
Channel Islands	830
Chile	152
China	156
China, Hong Kong Special Administrative Region	344
China, Macao Special Administrative Region	446
Colombia	170
Comoros	174
Congo	178
Cook Islands	184
Costa Rica	188
Cote d'Ivoire	384
Croatia	191
Cuba	192
Curaçao	531
Cyprus	196
Czech Republic	203
Democratic People's Republic of Korea	408
Democratic Republic of the Congo	180
Denmark	208
Djibouti	262
Dominica	212
Dominican Republic	214
Ecuador	218
Egypt	818
El Salvador	222

Country	Code
Equatorial Guinea	226
Eritrea	232
Estonia	233
Ethiopia	231
Faeroe Islands	234
Falkland Islands (Malvinas)	238
Fiji	242
Finland	246
France	250
French Guiana	254
French Polynesia	258
Gabon	266
Gambia	270
Georgia	268
Germany	276
Ghana	288
Gibraltar	292
Greece	300
Greenland	304
Grenada	308
Guadeloupe	312
Guam	316
Guatemala	320
Guernsey	831
Guinea	324
Guinea-Bissau	624

Country	Code	Country	Code
Guyana	328	Latvia	428
Haiti	332	Lebanon	422
Holy See	336	Lesotho	426
Honduras	340	Liberia	430
Hong Kong, Special Administrative Region of China	344	Libya	434
Hungary	348	Liechtenstein	438
Iceland	352	Lithuania	440
India	356	Luxembourg	442
Indonesia	360	Macedonia, The former Yugoslav Republic of	807
Iran (Islamic Republic of)	364	Madagascar	450
Iraq	368	Malawi	454
Ireland	372	Malaysia	458
Isle of Man	833	Maldives	462
Israel	376	Mali	466
Italy	380	Malta	470
Jamaica	388	Malvinas (Falkland Islands)	238
Japan	392	Marshall Islands	584
Jersey	832	Martinique	474
Jordan	400	Mauritania	478
Kazakhstan	398	Mauritius	480
Kenya	404	Mayotte	175
Kiribati	296	Mexico	484
Korea, Democratic People's Republic of	408	Micronesia (Federated States of)	583
Kuwait	414	Monaco	492
Kyrgyzstan	417	Mongolia	496
Lao People's Democratic Republic	418	Montenegro	499

Country	Code
Montserrat	500
Morocco	504
Mozambique	508
Myanmar	104
Namibia	516
Nauru	520
Nepal	524
Netherlands	528
New Caledonia	540
New Zealand	554
Nicaragua	558
Niger	562
Nigeria	566
Niue	570
Norfolk Island	574
Northern Mariana Islands	580
Norway	578
Oman	512
Pakistan	586
Palau	585
Palestine, State of	275
Panama	591
Papua New Guinea	598
Paraguay	600
Peru	604
Philippines	608

Country	Code
Pitcairn	612
Poland	616
Portugal	620
Puerto Rico	630
Qatar	634
Republic of Korea	410
Republic of Moldova	498
Réunion	638
Romania	642
Russian Federation	643
Rwanda	646
Saint Helena	654
Saint Kitts and Nevis	659
Saint Lucia	662
Saint Martin (French part)	663
Saint Pierre and Miquelon	666
Saint Vincent and the Grenadines	670
Saint-Barthélemy	652
Samoa	882
San Marino	674
Sao Tome and Principe	678
Sark	680
Saudi Arabia	682
Senegal	686
Serbia	688
Seychelles	690

Country	Code
Sierra Leone	694
Singapore	702
Sint Maarten (Dutch part)	534
Slovakia	703
Slovenia	705
Solomon Islands	90
Somalia	706
South Africa	710
South Sudan	728
Spain	724
Sri Lanka	144
State of Palestine	275
Sudan	729
Suriname	740
Svalbard and Jan Mayen Islands	744
Swaziland	748
Sweden	752
Switzerland	756
Syrian Arab Republic	760
Tajikistan	762
Tanzania, United Republic of	834
Thailand	764
The former Yugoslav Republic of Macedonia	807
Timor-Leste	626
Togo	768
Tokelau	772

Country	Code
Tonga	776
Trinidad and Tobago	780
Tunisia	788
Turkey	792
Turkmenistan	795
Turks and Caicos Islands	796
Tuvalu	798
Uganda	800
Ukraine	804
United Arab Emirates	784
United Kingdom of Great Britain and Northern Ireland	826
United Republic of Tanzania	834
United States of America	840
United States Virgin Islands	850
Uruguay	858
Uzbekistan	860
Vanuatu	548
Venezuela (Bolivarian Republic of)	862
Viet Nam	704
Virgin Islands (United States)	850
Wallis and Futuna Islands	876
Western Sahara	732
Yemen	887
Zambia	894
Zimbabwe	716