SPEC Kit 322

Library User Experience

July 2011

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EXECUTIVE SUMMARY

What is UX?

The term "User Experience" (UX) originally emerged from the web usability and application interface design community. Over the past few years, other service-oriented industries, such as the marketing and retail services community, have adopted the term as a holistic approach to describe designing the ideal customer experience. More recently, innovators have applied the design of such experiences to libraries. As Aaron Schmidt points out in his *Library Journal* column about the user experience, a goal for UX design is to minimize "pain" points throughout library processes, whether they are physical (library facilities, for example) or digital experiences (Schmidt, 2010). Furthermore, user experience as applied to the research library includes both the traditional customer service approach of reacting to user concerns, as well as proactively including users in the library design and strategic planning process by employing a variety of means, including focus groups and advisory boards.

A review of the literature suggests that there is a lack of controlled vocabulary when defining user experience within the library context. This is a relatively new field with little standardization, especially in academic or library environments. As a result, and as the data from this survey demonstrates, user experience is interpreted to include a wide range of activities in library organizations, including but not limited to assessment, user engagement, library design, outreach, and marketing. As Knemeyer writes in "Defining Experience," *everything* a company produces should be viewed through the lens of the user's experience (2008). Therefore, every part of the organization has a stake in improving that experience. Research libraries are beginning to adopt this integrative design approach and develop unique organizational structures to manage the user experience.

The Survey

The purpose of this survey was to explore recent and planned user experience activities at ARL member libraries and the impact these efforts have on helping the libraries transform to meet evolving user needs. The survey elicited examples of successful user experience activities to serve as benchmarks for libraries looking to create or expand efforts in this area. It also explored whether libraries have created positions or entire departments focused on user engagement and the user experience. The survey was conducted between February 7 and March 4, 2011. Seventy-one of the 126 ARL member libraries completed the survey for a response rate of 56%.

User Experience Projects/Feedback Opportunities

All but one of the survey respondents indicated that they engaged in at least one user experience project or activity over the past three years. Most of these past activities were both project-based and on-going. Almost all of the respondents report they plan to engage in at least one user experience activity in the coming year. As with the past UX activities, a large majority indicated that future activities would also be both on-going and project-based. Below are some examples of future activities:

- Our metadata and collections units are developing a User Experience Team to develop usability assessment and evaluation tools as well as run focus groups with various

campus groups (students and faculty) to better understand user needs and information seeking behaviors as discovery systems and collections continue to be amalgamated, redesigned, and/or acquired.

- Strategic planning, website usability, and OPAC usability testing.
- We plan an observational study of our library spaces in the spring of 2011, and an ethnographic study of how scholarly methods are changing due to new technologies and formats, also in Spring 2011.
- We will be starting a summer study of how researchers do their scholarly work, with a special emphasis on data management needs.

The survey asked respondents to select up to two user experience activities the library had recently undertaken that had the biggest impact or were most innovative. They were then asked a set of questions about those activities. They described 121 different activities. Many respondents reported on activities to solicit user input related to building renovation and redesign. Other UX projects included assessing the OPAC, user input regarding access to electronic resources, and general website usability.

Respondents were asked to describe techniques and tools they used to gather user input. The most frequently mentioned tool was surveys. The simplest were homegrown instruments that were printed and distributed in libraries or that were created using web survey sites. The most commonly mentioned survey tool was LibQUAL+® or a variant such as LibQUAL+® Lite. Many respondents indicated they regularly use LibQUAL+® every two to three years, creating a set of longitudinal data. A number of respondents also noted that they employ LibQUAL+® to identify broad areas of user concern and then utilize focus groups or targeted surveys to further understand those areas of concern.

Combined, the passive techniques of gathering anecdotal user comments or suggestions received physically or online were the second most frequently mentioned form of user input. Nearly two-thirds of the examples cited by respondents incorporated this type of feedback at some point in the data collection process.

Half of the UX activities used focus groups and a third employed some form of usability testing. The latter technique was used primarily for redesigning websites. As might be expected, more labor intensive techniques, such as individual interviews and observations, were not cited as frequently; their use was noted in ten and five per cent of the responses, respectively.

For approximately half of the examples, respondents used a combination of both open recruitment and direct invitations to solicit participants for feedback. A fourth used open recruitment only and the other fourth used direct invitation only. The survey data indicates that libraries used a variety of techniques to recruit participants. The most frequently mentioned example was e-mail, closely followed by an invitation on the library's web page or personal contact from a library employee. More than half of the respondents used all three of these approaches. Around a quarter of the respondents used social media tools, and a like number used in-house media, such as a library newsletter, in their recruitment. Libraries planning to recruit feedback participants should budget for some type of incentive, as over 70% of respondents indicated that they provided incentives. The most common incentives were food and gift cards. Nearly three-quarters of the respondents indicated that the costs associated with their feedback projects were borne by the library's operating budget; the remainder were financed by library foundation funds or special, one-time funding such as a grant.

Funds spent on soliciting user feedback seemed to generate a high return on investment; 43% of respondents noted that the feedback led to a complete redesign of, or major modifications to, library services or spaces. Another 39% noted that the feedback led to minor modifications to existing services or spaces.

For nearly 90% of the projects mentioned, libraries reported feedback results to important constituencies, such as users and library administration and staff. Also, many respondents indicated that they share survey results and other products of user experience activities in written form with institutional governing bodies. Examples include:

- Library of Congress Executive Committee and Management
- Data used in budget presentations to the President's Executive Team
- Campus Renovation Committee
- Senior levels of the university administration via the library's annual report
- The Learning Commons design process mentioned in the annual report and in the faculty newsletter
- Institutional Research Planning

Some respondents also indicated they share results within the library community via conference presentation and publication. For example:

- Conference presentations (IUG, ALA Annual, and possibly IFLA) as well as an intended article for *Library Trends*
- Publishing the results more broadly, e.g., in an academic article
- Communicating to the broader academic library community through conference presentations

A smaller number indicated they share results with the general user community via more widespread and public means such as social media, posting results on websites, and through the use of open forums.

Organizational Structure

Several questions in the survey sought information on how libraries organized activities and staffed positions related to assessment and, more specifically, the user experience. Nearly all respondents indicated that their library at least periodically conducts assessment activities, but a surprising number indicated no formal assessment structure in their organization. Most respondents indicated that assessment activities were often ad hoc and conducted by one or more library units that hoped to benefit from the particular information sought. Still, half of the respondents reported a dedicated Assessment Coordinator position, and a quarter identified a dedicated position focusing on user experience. Based on respondent comments, one

might expect a future upward trend for these types of positions. Numerous comments alluded to new or recently revitalized assessment efforts and new organizational structures and personnel to support such programs. The comments also indicated a very broad and growing awareness of the need to have activities focused solely on measuring and improving user experience. Indeed, while many respondents noted that user experience efforts were but one component of a broader assessment program, the importance of the user experience component appears to be growing substantially. One particularly appropriate comment demonstrating this trend is the following:

(UX activities) are the heart of our assessment activities. Most of our other "assessment" activities are merely keeping statistics about usage and involve very little actual assessment at this point in time.

As noted above, many of the responding libraries do not currently have one person dedicated to coordinating an assessment or user experience program. An inherent danger in not having a coordinator is the potential lack of a consistent message or brand in this area. In general though, responding libraries seem to have some awareness of this issue and have assigned fairly high-level supervision here. When asked to name who in their library has primary oversight of user experience activities, libraries that do not have dedicated user experience and/or assessment coordinators routinely indicated oversight by another department head level position or by someone at the associate dean/AUL level. When asked to whom this coordinator reports, over three quarters of the respondents indicated the coordinator reported to someone at the dean or associate dean level.

Strategic Planning

While there was not a specific question about it in the survey, a number of respondents referred to the library strategic plan or planning process. Several comments noted how user experience, or in a broader context, assessment activities provided input into their most recent strategic plan. Two respondents specifically mentioned the use of focus groups for user input,

while one noted individual faculty interviews. Two respondents also remarked that their student advisory boards provided input during this process, and one indicated that their University Library Committee reviewed strategic directions. On the output side, a number of respondents indicated that user experience and/or assessment were identified as strategic priorities or as action items within their recent strategic plans. One respondent noted that library user experience activities were funded by their parent institution as a part of the campus strategic plan. While the total number of references to strategic plans was limited, we might expect to see an increased emphasis on user experience and assessment activities in strategic plans as the UX field matures and becomes more commonplace in research library agendas.

Advisory Boards

Over 80% of the respondents indicated that they had some type of formal advisory board in place. In their responses they described 117 separate boards, of which 60 were composed solely of students. Half of the student boards included both undergraduate and graduate members, or the respondent noted only that the board had student members but made no distinction on their classification. The other half of the student boards was split almost evenly between "undergraduates only" and "graduates only." Nearly all the student boards were noted as providing a mechanism for student advice and input. When asked what specific outcomes resulted from these boards, respondents noted three primary areas: general input on policies and services, review of and possible extension of service hours, and input on library renovation and space utilization, especially as it pertained to the creation of quiet study zones.

Thirty-three of the advisory boards were composed of faculty only or a combination of faculty and staff. The majority of these boards were considered to be of an advisory nature, although a few had targeted missions. When asked about outcomes here, respondents indicated that for nearly half the boards the primary outcome was establishing and maintaining communication between the faculty and library administration. Interestingly, a fourth of the faculty boards had no outcomes listed at all. The remaining boards had outcomes listed of improving services and collections, reviewing and/or approving proposed policy changes, and assistance in survey development.

Sixteen boards were composed of faculty and student members. The most common faculty/student board structure reported was of a faculty senate committee that included limited student representation. Notably, these boards more closely resembled faculty-only boards than student-only boards in their roles and outcomes. Two-thirds of the respondents indicated the primary board role was advisory in nature, and two-thirds associated no specific outcomes as a result of the board.

Eight of the boards did not include student members and had little or no faculty representation. These boards were primarily associated with library development efforts.

Based on the information submitted in this survey, it appears that a majority of boards associated with user engagement activities contain only student members. For the most part, respondents noted well-defined roles and outcomes for these boards. Boards composed only of faculty members or faculty members with limited student participation were often viewed as important communication tools but had less well-defined outcomes or no outcomes noted at all. Institutions seeking active student input on user experience activities may be better served by the use of student-only boards rather than boards with limited student participation.

Summary

This survey revealed that nearly all responding ARL member institutions are employing a form of user engagement, whether or not they refer to it as such. For some libraries, the activities may be limited to small surveys or perhaps a focus group, while other libraries are engaging users through formal advisory boards and are sponsoring comprehensive ethnographic studies. Organizationally, the responding libraries range from an institution with no formal assessment program that periodically conducts ad hoc exercises to an institution with a user experience department. While there appears to be a lack of common vocabulary or program standardization, there is a growing

awareness of the need to assess libraries from the user perspective with new positions and even departments created to accomplish this goal.

It is clear that creating the structure to measure and change the user experience takes time and effort. As one respondent noted, "You can't just suddenly tell staff 'Ok, today we have a new user experience' and expect everyone to jump on the bandwagon. I hope in your study you will communicate that making this transition to a UX culture takes time and staff have to be ready to move forward because they believe in it, not because an administrator says we need a new UX or because we created a UX librarian position."

Overall, respondents feel that efforts made in assessing the user experience are well spent. They articulated numerous projects that resulted in major program updates and facility revisions and that were well received by library administration, governing/funding boards, and most importantly, by library users.

These trends are significant because it suggests that user experience activities have been adopted by almost all respondents, and furthermore, that these activities and projects are long term in nature. Thus, the trends point to a present and future with UX activities more central to the operations of ARL libraries.