Like Peas and Carrots: A Case for Assessment and UX Teams

Michael Luther, Emory Libraries
Emily Daly, Duke University Libraries
1. AUX = Assessment + User Experience
Why A + UX?

- Holistic: online and physical spaces, services, collections, programming
- Assessment and UX use similar methods and techniques
- Assessment lifecycle lends itself to UX improvements
- AUX teams can serve many functions. Flexibility is encouraged!
Drivers of AUX

- To report information
- To track performance
- To discover unknowns
- To inform decision-making
- To understand user behavior
2. Our stories

How AUX at Emory and Duke came to be
Start of AUX at Emory

- Assessment program began in 2005
- Assessment Integration Group (AIG) founded in 2015
- AUX Team founded in 2018; Head of AUX hired in 2019
- AUX is in the Services Division to be closer to users
Emory’s AUX Team:

- Kristan Majors: Assessment Coord. Services Division
- Chris Pollette: Service Design Librarian
- Michael Luther: Head of AUX
- Doug Slaughter: Collections Analyst
- Pat Culpepper: Assessment Program Coordinator
EUL: AUX roles & functions

Assessment
- Data management
- Data visualization
- Data reporting
- Biennial library survey (with AIG)
- Outcomes Assessment

User experience (UX)
- Springshare Product management
- Website UX
- Smaller projects, studies

Consulting
- Lots of Committee work related to eBooks, Digital Libraries Program, LibGuides, Discovery Layer
- Less formal consulting also
Start of AUX at Duke

- UX department formed in 2013 with 2 staff
- Hired 1 assessment analyst, formed Assessment Core Team (ACT), and became AUX in 2014
- Welcomed 2 staff with expertise in web development, data viz, and project management in May 2018
- Holistic approach from the start - UX of physical and virtual spaces + assessment of all aspects of library services
Duke’s AUX dept

Emily Daly
Head, Assessment & User Experience Department
(919) 660-5879
emily.daly@duke.edu

Joyce Chapman
Assessment Analyst & Consultant
(919) 660-5889
joyce.chapman@duke.edu

Thomas Crichlow
Web Experience Project Lead
(919) 660-6932
thomas.crichlow@duke.edu

Cory Lown
Application Development Project Lead
(919) 660-5885
cory.lown@duke.edu

Angela Zoss, Ph.D.
Assessment & Data Visualization Analyst
(919) 684-8186
angela.zoss@duke.edu

Candice Wang
AUX Graduate Student Assistant
yuxi.wang@duke.edu

From Duke’s AUX Website: library.duke.edu/about/depts/assessment-user-experience
## AUX roles & functions

### Assessment
- Stats and reporting
- Consulting
- Library-wide projects
- Smaller projects focused on services or initiatives

### User experience (UX)
- Duke Libraries website
- Lead Developer and Product Owner for Books & Media catalog
- Wayfinding and UX of physical spaces

### Project management
- Software development
- Short-term teams to focus on issues raised in assessment
- Consulting and facilitation
3. Case studies

Example Assessment + UX projects
Biennial user survey

2020 Student Survey

Use the dashboards and instructions below to explore data from the 2020 Student Survey conducted by the Assessment and User Experience department. If you have questions, contact joyce.chapman@duke.edu.

- Survey instrument: Microsoft Word version of the survey instruments (built in Qualtrics).
- Instructions (PDF): how to use the Tableau dashboards
- Student dashboard: Explore every survey question by library and demographics facet
- Comments dashboard (Staff-only): Explore the topical tags of the 4,000 survey comments left by students by demographics facet

Student survey dashboard

Note: if the embedded dashboard does not appear, view it here.
## Biennial user survey

### High Priority Recommendations

<table>
<thead>
<tr>
<th>Rank</th>
<th>Quadrant</th>
<th>ID</th>
<th>Recommendation</th>
<th>$$</th>
<th>SR</th>
</tr>
</thead>
<tbody>
<tr>
<td>U</td>
<td></td>
<td></td>
<td>Promote the Find Library Spaces tool, <a href="https://library.duke.edu/using/library-spaces">https://library.duke.edu/using/library-spaces</a>, to users, and make it more accessible through the DUL website.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CB</td>
<td></td>
<td></td>
<td>Provide support for online and physical exhibits, which help highlight DUL collections and provide opportunities for users to connect with or see themselves in exhibits and programming, especially exhibits and programs that feature minoritized user groups.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CR</td>
<td></td>
<td></td>
<td>Review labels and terms used in the Libraries’ catalog interface, and aim to make these labels more user centered.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>DA</td>
<td></td>
<td></td>
<td>Increase students’ awareness of their ability to access library resources when they are off campus.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Duke University Libraries Catalog
Find books, ebooks, journals, movies and music, government documents, and more

New From Duke Authors

- **Reading Hindi: Novice to Intermediate**
  - Kusum Knapczyk and Peter Knapczyk.

- **The Lie That Binds**
  - Ilyse Hogue and Ellie Langford.

- **Upstream: The Quest to Solve Problems Before They Happen**
  - Dan Heath.

- **Privilege: A Novel**
  - Mary Adkins.

- **Reporting Quantitative Research in Psychology: How to Meet APA...**
  - Harris Cooper.
<table>
<thead>
<tr>
<th>Task Description</th>
<th>Sprint 54</th>
<th>9 issues</th>
</tr>
</thead>
<tbody>
<tr>
<td>Small August: sprint to finish up a few things and prepare for name authority searching stories.</td>
<td></td>
<td>06/Aug/20 8:51 AM • 01/Sept/20 8:51 AM</td>
</tr>
<tr>
<td>Move NCSU expand search to WorldCat into TRLN Argon</td>
<td>TD-119</td>
<td></td>
</tr>
<tr>
<td>Add transactional cleanup features to Spofford</td>
<td>TD-825</td>
<td></td>
</tr>
<tr>
<td>Detailed bibliographic information (content will differ by format, if needed)</td>
<td>TD-219</td>
<td></td>
</tr>
<tr>
<td>Index 100,000 Duke records with name authority data</td>
<td>TD-1066</td>
<td></td>
</tr>
<tr>
<td>Estimate AWS cost for indexing name authority data based on Duke sample</td>
<td>TD-1067</td>
<td></td>
</tr>
<tr>
<td>Investigate how to transform the batch data from LOC and dump it into a database</td>
<td>TD-1008</td>
<td></td>
</tr>
<tr>
<td>Draft model for the name authority data in the Solr documents</td>
<td>TD-1009</td>
<td></td>
</tr>
<tr>
<td>Investigate Solr-based solution for &quot;Did You Mean?&quot;</td>
<td>TD-1016</td>
<td></td>
</tr>
<tr>
<td>Create a separate Syndetics OCLC field that will be excluded with standard qualifier text</td>
<td>TD-1012</td>
<td></td>
</tr>
</tbody>
</table>
Reserve a Seat

Reserve study seats and equipment

Students, faculty, and staff with Duke IDs and email addresses can reserve study spaces. Affiliates and visiting scholars are not eligible for this service.

- Bring your Duke ID and SymMon pass when you come to the library.
- Wear a face mask and practice social distancing while in library spaces.
- Covered beverage containers are permitted. No food allowed.
- Library stacks are open only to library staff. If you need library books, request them through Library Takeout.

Reserve study seats by location

- Study seats in Perkins Library (in The Perk), 8:30 a.m.-11 p.m.
- Study seats in Rubenstein Library, Floor 2, 8:30 a.m.-11 p.m.
- Study seats in Rubenstein Library, Floor 3, 8:30 a.m.-11 p.m.
- Study seats in Bostock Library (in The Edge), 6-11 p.m.
- All study seats in Perkins, Bostock, and Rubenstein Libraries (up to 6 hrs total per day)
- Study seats in Lilly Library, 2-11 p.m. (up to 6 hrs total per day)
- Study seats in Music Library, 10 a.m.-3 p.m. (up to 3 hrs total per day)
Reserve a Seat

Check in when you arrive: bit.ly/library-reservations

Clean up after yourself when your time is up
Reserve a Seat

Popularity of Study Spaces

<table>
<thead>
<tr>
<th>Location</th>
<th>Building Zone</th>
<th>Seat Group</th>
<th>Number of Seats Booked</th>
<th>Number of Seats Available</th>
<th>Time Booked (Hours)</th>
<th>Time Available (Hours)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perkins, Bostock</td>
<td>Rubenstein</td>
<td>Rubensteing Gothic Reading Room, Power</td>
<td>26</td>
<td>26</td>
<td>4,952.3</td>
<td>8,294.0</td>
<td>60%</td>
</tr>
<tr>
<td>&amp; Rubenstein</td>
<td>Library Floor 2</td>
<td>Rubensteing Gothic Reading Room, No Power</td>
<td>4</td>
<td>4</td>
<td>606.5</td>
<td>1,276.0</td>
<td>48%</td>
</tr>
<tr>
<td>Study Seats</td>
<td></td>
<td>Rubenstein 249</td>
<td>5</td>
<td>5</td>
<td>736.3</td>
<td>1,595.0</td>
<td>46%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Rubensteing Floor 2 Seats Power</td>
<td>10</td>
<td>10</td>
<td>1,294.0</td>
<td>3,190.0</td>
<td>41%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Rubensteing Floor 2 Seats No Power</td>
<td>3</td>
<td>3</td>
<td>128.5</td>
<td>957.0</td>
<td>13%</td>
</tr>
<tr>
<td></td>
<td>Rubenstein</td>
<td>Rubensteing 357</td>
<td>2</td>
<td>2</td>
<td>426.5</td>
<td>638.0</td>
<td>67%</td>
</tr>
<tr>
<td>Library Floor 3</td>
<td></td>
<td>Rubensteing 353</td>
<td>2</td>
<td>2</td>
<td>426.5</td>
<td>638.0</td>
<td>67%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Rubensteing 355</td>
<td>2</td>
<td>2</td>
<td>414.0</td>
<td>638.0</td>
<td>65%</td>
</tr>
</tbody>
</table>

Users and Spaces

Unique Users of Study Spaces
(Number of unique users who made a booking. Note that some of these bookings were cancelled by the user.)

1,532

Number of Bookings Per User (including cancelled)

603 users made 1 booking during this time period.

One user made 52 study space bookings during this time period!

Date Filter Start: 9/1/2020
Date Filter End: 9/30/2020

Number of Study Space Bookings

Bostock Seats

25 26 366.8 8,294.0 44%
Collection Mgmt. Dashboard

- Cost/use data for firm orders
- Filterable
- Hovering over circles gives title-level detail
- Informs decision-making

Visualization by Doug Slaughter
Website UX (task analysis)

- New main site launched Jan. ‘20
- Built off work conducted by Viget (contractor) during design phase
- 24 tasks, 14 participants, 3 user groups
- Combining success measures, technical observations, and illustrative participant comments
- Themes identified; Errors notated
Database Types Study

- Do users and librarians understand database types the same way?
- Understand user behavior
- Card sorting activity
4. Privilege & Tribulations

It’s not (always) easy being green
Joys of this approach

- Range of expertise and skills sets in a single dept
- Number of people to move work forward and infuse an AUX mindset throughout the library
- Administrative buy-in -- we’re a department, with a budget!
But challenges, too

- Expectation that we can do it all
- Notion that UX and assessment can be left entirely to one dept
- Increased pressure to prioritize, coordinate, communicate
Lessons learned

- Importance of prioritizing and scoping work, and revisiting the scope frequently
- Not all staff have an interest in assessment or UX improvements; some staff might even feel threatened
- Need to advocate for AUX work with library leadership and staff -- re-establish buy-in
Don’t have an AUX dept?

- Form a cross-departmental team like Emory’s AIG or Duke’s ACT
- Add a UX or assessment phase to existing/new projects
- Consider consulting as a service
- Team up with peer libraries to form an assessment or UX community of practice
5. What the future holds

Iterative improvements in our departments and libraries
What’s next at Duke?

- Continue successful AUX practicum and graduate assistantship
- Assess and improve Fall 2020 services for Spring 2021
- Lead in-depth user study of international students
- Migrate the library website, with focus on streamlining content
And at Emory?

- Improve capture, visualization, and analysis of Springshare data
- Needs Assessment of Emory Libraries (4 libraries, 5 divisions)
  - Inventory of assessment practices and products
  - Survey of AUX strengths, challenges and opportunities
  - Followed up with interviews/articulating needs
- Finishing touches on a “Library Profile” dashboard of core metrics
- Library survey rescheduled for Spring 2021
Thanks!

Any questions?

Michael Luther,
michael.emory.luther@emory.edu

Emily Daly, emily.daly@duke.edu