



Assessment jumpstart tools

Synopses of space programming
and planning assessment tools
covered in the workbook

Surveys and comments

When to use: Surveys provide quick, often anonymous, insight into opinions; comments offer a constant stream of feedback.

How these work:

The survey is a topical, focused, timely capture of opinions. It must be carefully crafted, and not overwhelm. Data are collected and analyzed for meaning.

Comments via flip chart, button on Web page, and freely offered by customers are analyzed in same way as survey data.

Structured Conversation

When to use: For deep investigation into customer realities. Use at start of program planning.

How it works: Provides scripted interviews for 1-on-1 engagements so inexperienced interviewers can participate in discovery. Interviews may be recorded, videotaped, and / or notes taken. Scripting focuses questions on essential fact-finding. Afterward, the planning team views videos or reads transcripts together, makes notes, discusses, extracts meaning, translates findings into programming.

Design charettes

When to use: With intended customers to test draft of physical layout, or to elicit their layout solutions without reference to your work; or to provide reaction to virtual layouts like the library Webpage.

How it works: Capitalizes on the innate wisdom and experience of customers. Subjects love to convey their insight via modeling, remixing, drawing, mashing-up. The observer elicits reasons for the decisions being made. Subjects work solo or in teams. All “constructs” and their logic are collected and reviewed by assessment team for meaning & insight, then transferred into programming.

Survey tours (with photographs)

When to use: To witness where, how, and why customers use specific locales to achieve learning or productivity needs.

How it works: Prepared with scripts and digital camera, teams descend on locations (e.g. study areas or offices) to interview & take pictures of subjects at work. Responses are written / recorded, then reviewed by assessment team for trends, meaning, insight and applied to needed solutions around space and resource planning.

Affinity focus groups

When to use: As customer brainstorming exercise to elicit their responses to programming and physical elements of space.

How it works: Invitees in groups of 8-10 participate in 4 phases of work under direction of facilitator to: generate many ideas / elements, group these into related clusters, and suggest literal and metaphoric titles for each cluster. Assessment team then looks for overarching ideas to incorporate into programming & physical design.

Lunch invitations

When to use: Just prior to space planning work; to provide ongoing dialogue with customers.

How it works: Planning team reps (or dean and / or senior administrators related to ongoing dialogue) invite related groups of customers (undergrads, grads, related majors, faculty, etc.) to informal lunch, either around a topic, or for wide-ranging discussion. In a no-stress, welcoming setting, guests are subjected to a pre-planned 'short and simple' series of questions to explore their opinions. Confers message that library is genuinely interested in learning how to better respond to their needs.

Structured conversations

When to use: For helping library staff to overcome reluctance of engaging 'imposing' groups (think 'faculty') in discovery.

How it works: Talking points are carefully composed to elicit opinions on a topic. Particularly effective in jump-starting needed library staff engagement with faculty. Faculty are visited in their offices to portray their habits, practices, and logic around a central theme. Useful when exploring class assignments and learning expectations, assumptions about how the library helps students, and skills they hope to see students master.

Videotaped interviews

When to use: During early data-gathering phase of building project. Excellent for insight into graduate student and faculty behaviors.

How it works: Requires interviewer & camera operator. Prepared script may focus on work habits, organization of resources, research methodology and network of primary relationships, as well as challenges, needed tools & resources, ideal library support, etc.. Taped interviews are screened by assessment team for apparent and subliminal themes to inform planning. These concepts can be tested, shared, and incorporated into final solutions.

Sand boxing / experiments

When to use: To test solutions, especially new concepts, prior to large-scale commitment. Reduces risk & builds confidence / suggests new paths.

How it works: As your discovery around elements of the built space emerge, especially unfamiliar, bold, or even 'questionable' concepts, create small-scale, inexpensive installations to track, assess, refine, or possibly discard. Be sure to include target audience in assessment. When constructing your new or renovated facility, include 'zones' that can be converted into sand box spaces to conduct ongoing experiments.

Campus & outside experts

When to use: Whenever expertise is missing on the planning team, or to enhance existing talent with ‘experts’.

How it works: When planning halts over a complex issue, or when many informed opinions are required, seek out experts on campus (or outside if necessary) to ‘un-stick’ the process, gain confidence in decisions, and (perhaps especially) to challenge or inform your solutions. Obvious experts are anthropologists, ergonomists, R&D divisions of furniture companies, assessment offices, qualitative data analysts, education technologists, and even academic classes to construct solutions as part of a ‘for credit’ activity.

Student & faculty advisory groups

When to use: Always good to have on hand, especially around building projects or ambitious initiatives.

How it works: Formally construct, then charge the group with substantial authority and license to work with the library on substantive projects. Project team leaders may facilitate, perhaps including dean or other senior staff person. For building projects, provide them complete insight into every step of assessment, programming, and final solutions. Look for ways to incorporate their assistance in the work to be done. Sends important message to campus that the library is transparent and focused on user needs.

Learning commons oversight council

When to use: Created at end of building project as the 'hand off' team to oversee, support, and evolve the programmed space; includes partners.

How it works: Individuals representing key components of the built space, both library & partner staff, provide ongoing oversight and facilitate successful outcomes for commons staff and their users. Decisions informed by ongoing assessment, observations from front-line staff. Has authority to create new positions, infuse new or upgraded resources, and make needed corrections or request new experiments as commons evolves.

Report cards & post-occupancy assmt.

When to use: Upon delivery of new space, a comprehensive analysis of the process and outcomes is created to inform future projects. New assessment is conducted throughout life of the space.

How it works: Senior team coordinates report with primary input from all work teams (coordination / facilitation, staffing, training, technology, furnishings, policies, etc.). Participants indicate what assisted planning, and what should improve for future projects. Post-occupancy assessment is ongoing and critical to the work of oversight council and each element of the space.

“Jumpstarting the Assessment of Library Learning Spaces”

A workshop presented at the 2008 Library Assessment Conference

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Dear Colleagues,

Welcome to this workshop on jumpstarting assessment of learning spaces!

We share your passion for creating and sustaining great learning spaces that are informed by intelligent assessment. In your correspondence with us prior to arriving in Seattle, you indicated several motivations for attending: a renovation is being talked about but requires a compelling argument to go forward; you have just begun a planning process for a learning commons and want to get all the elements right; or you are living with a learning space that needs refreshment or expansion to an additional audience. Each of you is looking for assessment techniques that will supply irrefutable data and deep insight for your work. We all aspire to hit a home run as we mitigate the risks and pitfalls of space / program design and nurturance!

Each technique in this workbook is used in libraries today to inform space design and to elicit intended outcomes (we are particularly indebted to the superb assessment work of the University of Rochester, conducted under the guidance of Nancy Foster). We see good results arising from these techniques. Our premise is that these tools can be learned and applied by library staff without assistance from experts. An added benefit is that libraries that use their staff to conduct assessment report that these experiences are valued, motivational, and instill an appetite for more engagement with customers.

Over the course of the half day, you will be exposed to the assessment tool kit, hear a bit about how each technique works, and have opportunities to apply these tools to scenarios. We also hope to have time at the end of the workshop to address some of your specific assessment needs.

We have set an ambitious agenda. The more you engage in the day's proceedings, the more you will take away from the workshop. We are committed to instilling you with the knowledge, conviction, and confidence to use the tools when you return home.

Let's jumpstart!

Crit and Todd

Table of Contents

Assessment Techniques

Surveys & Comments	2
Design Charettes	4
Survey Tours (with Photographs)	6
Affinity Focus Groups	8
Lunch Invitations	10
Structured Conversation	12
Videotaped Interviews	14
Sand Boxing / Experiments	16
Campus and Outside Experts	18
Student and Faculty Advisory Groups	20
Learning Commons Oversight Council	22
Report Cards / Post-Occupancy Assessment	24
Learning Commons Building Planning Process	26

Case Studies

Learning Commons A	32
Learning Commons B	34

<i>Bibliography</i>	36
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Technique: Surveys & Comments

Definition of Terms:

Survey: structured questions, typically on a single topic, administered via print or online.

Comments: opportunities to provide ad-libbed remarks and observations

When to use:

Survey:

Provides a quick and relatively easy way to sample opinion on a topic. The survey might appear on a login screen as an optional request for information. Should be used infrequently because surveys are perceived as a nuisance . . . perhaps no more than twice per year. Another technique is to distribute a print survey 'guerilla style' throughout the library on tables tops for students to fill out and return to a drop box near the exit (or even left on the tables for pick-up by library staff). Experience shows that up to 25% of surveys will be filled out.

Comments:

Here we mean a 'send us your comments' button on the library Web page, a comments box positioned at a popular destination in the library (circulation or reference desk), or set-up as a large flip chart that poses a question to passers-by.

Surveys and comment feeds may be used at the beginning of a planning project, or after a renovation or new building is completed to generate ongoing feedback.

How Surveys & Comments work:

Surveys

Surveys should be deployed with care. Commons mistakes are to: make them too long; ask the wrong questions; ask self-serving questions; or ask too many 'yes / no' questions that don't supply deep insight. One might turn to assessment experts on campus to review a draft survey prior to using it. Our users also complain that we survey them too frequently, so deploy surveys infrequently.

Here is an example of a survey created by a library wanting to understand how to improve its multimedia production facility. A student survey is written to pop up on all multimedia production screens when one logs in (it may also be distributed in print throughout the multimedia center). The survey might ask the following questions:

- What is your major?
- What classes or projects have prompted you to use the multimedia center this year, and who is the instructor in the course?
- On average, how much time do you spend in the multimedia center each semester?
- What applications do you use when you are here?
- What applications not currently offered would help you?

- What situations prompt you to ask the assistant for help?
- What expert assistance not currently offered in the center would help you?
- If the center were to offer training sessions of 30- or 60-minute length, what topics would interest you, and what time of day or evening would you most likely attend the session?
- Why do you use this multimedia center rather than others on campus?
- What would make this the perfect multimedia production facility for all your needs?

Analysis of feedback is carefully undertaken. For the example above, some considerations are: What themes arise in the feedback? What feedback is most directly tied to learning outcomes or other stated goals of the multimedia center? What are the most ambitious and far-reaching desires, and are they attainable as either immediate or incremental improvements? What are the implications for staff: depth of knowledge, appropriate coverage of all useful applications, training skills, purchase of additional technology, hours of operations, etc.? Is the library already engaged with faculty whose classes make heavy use of the center, or do these contacts need to be established? Should more effort go into working with faculty to identify the multimedia fluencies that they expect their students to attain via training sessions and expert assistance offered in the center?

As a result of this analysis, an improvement plan is developed to characterize costs, training and staffing issues, technology needs, potential for expansion, etc..

LibQUAL+ with its "library as place" dimension is a helpful tool for identifying contemporary concerns that users may have about library space. Perhaps most revealing are the narrative comments that survey respondents provide. Comments relating to space / building issues can apprise staff of overlooked or minimized issues. Are the recommendations or requests for improvement achievable, either at once or incrementally? Users care deeply about aesthetics, comfort, ergonomic concerns, and other elements that contribute to ambiance and productivity. Is the library meeting these basic expectations?

Comments

"Send us your comments" button on the library Web page: the button / mechanism should be persistent across all library pages, and easy to recognize. Users will provide feedback if it is easy to do. If you have a home page for a learning commons, a comment button belongs there.

Flip charts are a simple technique for gathering feedback about a space. A 2' x 3' pad can be mounted on a stand and placed in a high traffic area or near an elevator. At the top of each page is written a specific invitation to provide comments on a topic. Use it when you are first opening a new facility to solicit impressions, or use it ask about hours of operation, technology suggestions . . . any 'small bite' topic is appropriate.

Feedback gained via "send us your comments", flip charts, and suggestion boxes is analyzed in the same manner as for surveys.

Technique: Design Charettes

When to use:

As programming elements for a space renovation or new building begin to accrue through assessment and other forms of discovery, the concepts are plowed into a floor plan created by architects and planners. Design charettes provide opportunities for intended users and others to provide their own solutions to space. Sometimes planners and intended users can be poles apart in their sense of what is needed. The design charette can help to make important adjustments to imagined spaces up to the last minute. Degree of difficulty: low.

How Design Charettes work:

Design charettes is employed toward the end of the physical layout and space articulation phase of your project. It is a powerful tool to provide to users (faculty, students, other affected audiences) to capture their wisdom about how to layout the properties of the space. Expect to have elements of your layout ideas overturned by the invited subjects. Imagine that you will be surprised and delighted by the outcome of the charette exercise. And commit in advance to let go of any layout element that seems to be contradicted by the invited subjects.

The exercise should not require more than one hour of the subjects' time. (Note: this exercise might also be set up in virtual space.)

Imagine that an architect has taken your programming ideas and created a physical expression of your needs. It will be represented as a floor plan with all properties, furnishings, offices, service points, productivity areas, classrooms, etc., placed in specific locations. Your planning team will have spent time with the architect explaining each element, juxtaposition of services, offices, user work areas, etc.. You now have an opportunity to bring outside audiences in to provide their own solutions to space layout.

Working from the new building documents, create an empty floor plan of the space showing exterior walls, windows, and points of entrance / exit. Then create correctly scaled pieces of paper representing the furniture, computer stations, service desks, and all other elements of the space, perhaps color-coordinated by function or property.

Invite groups of individuals who will use the space:

- Send invitations to students to participate in a floor planning exercise. Invite individuals who have no prior exposure to the planning process (so library student assistants would be excluded from the exercise). Imagine running two sessions of 8-10 invited guests. Indicate the time commitment is approximately one hour.
- When the invited individuals arrive, tour the floor or spaces that will be renovated, but without saying where the new elements are expected to be placed. Provide an overall sense of what will be supported in the space.
- Now bring the subjects into a room that has several tables to accommodate the assembled audience into groups of 2-3. Provide each table of subjects with a large copy of the empty floor plan. Provide a pile of cutouts representing all the elements that you expect to put into the space.

- Review these elements with the groups so that they know what the charette kit is composed of, and the number and function of each element. Answer questions that might arise, such as “How were these elements identified?” (your answer might be that the elements were identified via other assessment techniques).
- Instruct the groups to create their own layouts using the cutouts. Invite them to explain their decisions in the margins of the floor plan.
- As they work, invite the teams to create additional amenities to incorporate into the floor plan that make sense to them per their understanding of what the space is intended to accomplish. These additional elements may be drawn in, or cut out from colored paper that you have supplied. For these additional items they might add, invite them to explain their inspirations in the margins of the floor plan.
- Once the groups have finished their layouts, visit each one and ask them to explain their logic. Record their remarks in the margins of the floor plan.
- Thank the groups for their good work (sometimes incentives are used to attract subjects to participate; it’s always a good idea, at a minimum, to provide refreshments as they work).
- Take pictures of each newly created floor plan, and tape up and conserve the paper plans as well. You’ll refer to these in the future.
- With the architect and planning team (and student advisory council if you have one), review the subject-created plans looking for inspiration. Inevitably your or your architect’s wisdom will be challenged. For layout solutions that were frequently repeated, it is likely that the user has the better answer. Adjust your master plan accordingly.
- If you’re creating community excitement and engagement around your project, post the subjects’ plans in a public place and invite additional public comment via adjacent flip charts. These comments might lead to additional insight into layout.

Technique: Survey Tours (with Photographs)

When to use:

Useful interview tool when gathering information on how students behave, convene, and study on campus. This technique can also be used in the learning commons or elsewhere in the library after a renovation to determine what students are doing, what is working well for them in the space, and what might be improved. Degree of difficulty: low.

How Survey Tours work:

Survey tours provide an excellent method for observing students in their preferred settings. Gives insight into amenities, aesthetics, resources, study practices, accommodations and communities in settings outside the classroom. Survey tours are usually conducted by pairs of individuals who bring along note pads and (frequently) Polaroid cameras to record what they learn. The discovery is driven by a series of questions that are posed to each individual or group of students who are found in the popular site.

Detailed description of the technique:

When contemplating what is required in a learning space, we can learn a lot from campus computer labs and popular study spots. Students are usually “here” because the space offers the best combination of characteristics required to sustain the student or group over long periods of time. The questions posed should be simple, and crafted to get at the heart of why students are in these places. The data helps to inform the amenities you provide in your learning space.

1. Determine the opportunity to explore, and craft a questionnaire to provide the best insight. If you don't know where the most popular study sites are, students and others can clue you in. Try to determine when the largest number of students might be in the space (remember, evenings are when most students study, so consider conducting some of this discovery in evenings). When you descend on a site, try not to disrupt. Make a quick appraisal of the area, then approach the first table or gathering of students, indicate you're from the library, and ask if you might interrupt them for 5-7 minutes to ask a brief series of questions (in our experience, students almost always tolerate the interruption).

Example: one university created the following questionnaire to explore the properties of the most popular studying sites on campus. The answers were used to inform the properties of an undergraduate learning commons.

Questions:

- May we ask why you study here?
- What are you studying / working on today? Is your use of this space always for the one course, or do you work on other class assignments here as well?
- (if addressing a group studying together, which is usually the case) How often do you study as a group?
- What are the benefits to each of you for studying as a group?

- What technologies do you use here?
 - What aesthetics about this space appeal to you?
 - Are there individuals in this building or in this space who are part of an extended community that you rely on? (If 'yes') Explain who these other individuals are and what they contribute to your efforts.
 - Do you ever study in the library? (If 'yes') How often?
 - Why are you not studying in the library now?
 - What would the library need to do to make it your preferred destination for study?
 - Is there anything else you want to say about this space or about the library?
2. If you brought along a camera, take a picture of each interviewed individual or group. Try to capture all the materials, laptops, etc., scattered across the table. On the back of the picture, make brief notes indicating where it was taken, time of day, and perhaps some link to the answers that this individual or group provided.
 3. Interview all individuals / groups in the space.
 4. When all popular study areas have been surveyed, gather the teams of interviewers together to gather their first impressions.
 5. Have each team type up the interviews:
 - A) Create synopses of what each group said. One team may have interviewed 20 groups, so each interview's feedback will be recorded, 1 through 20.
 - B) Now create a summary of feedback that records the relative occurrence of each sentiment / observation posed by interviewees, listing both common themes and outlying answers. Indicate the relative frequency that each theme was mentioned.
 6. Convene the interview teams to review their summary documents. What are the big, most-repeated ideas? What are the surprise themes (especially if frequently repeated by students), and what meaning can the group tease out of them? Are there opportunities to test some of the concepts on a small scale in advance of incorporating into the built space? If possible, also convene groups of students and library and partner staffs to hear the results and reflect on them. If you have a student advisory council, they should also be given an opportunity to react to the data. There may be a role for them to play in gathering the data . . . for example, as members of interview teams.
 7. The assessment coordinator should now make a composite document of the reports, along with recommendations arising from the interview teams, and incorporating helpful feedback and reaction from other audiences who have reviewed the findings.

Technique: Affinity Focus Groups

When to use:

A brainstorming exercise for quickly generating ideas to inform space planning, assets, technologies, furniture, amenities. Difficulty: low to moderate.

How Affinity Focus Groups work:

A large number of subjects can be engaged to generate ideas, analyzed for trends, themes, and commonly held notions. A core of ideas will be repeated across the groups, helping the library know where to focus its resources, amenities, technology, etc., and mitigate the risk of otherwise “guessing” what the client group requires to be productive, successful, good learners, etc.

Detailed description of the technique:

Overview

Groups of 8-10 individuals are convened for a 1-hour interview composed of four phases:

- idea generation
- grouping ideas into 5-8 clusters of related characteristics
- labeling the affinity clusters with a literal title
- labeling the clusters and the entire exercise with metaphoric titles

The focus group participants may be grouped by academic major, class year, etc.. The content generated by each focus group is merged and themes are extracted. Ideas about furnishings, technology, support, aesthetics, etc. are reviewed, with the most frequently mentioned ideas given serious consideration for inclusion in the new or renovated space.

Detail: Part 1

Groups of 8-10 individuals are convened for a 1-hour interview composed of four phases:

- Tools & layout for the focus group: provide light refreshment to assembled group, seat them at a spacious table (circular or square), and provide pens and Post-It pads at each seat. The room you convene in must also have a large white board or other vertical surface on which Post-It notes will adhere; this display surface should be a minimum of 10 feet wide.
- Tell the group that you will take them through an hour-long exercise to generate ideas for a new space. All ideas are good, out-of-the-box thinking is great, the more ideas the better.
- Introduce an overarching question to drive their idea generation. For example, if the library is considering creating a dynamic, group-engagement space, the overarching question might be: “The library will renovate a floor for group engagement. A lot of students will come into the space, and it will likely support several different learning activities. What does this space look like? What can one do in the space? What technologies and furnishings are found there? Imagine that you are flying over the space and reporting what you see.”
- Invite focus group members to start suggesting ideas. Tell them to address only you, and no one else at the table. Their idea can be a word, phrase, or sentence. Have them record each concept on a Post-It note which they peel off and arrange in front of themselves.

- Invite focus group members to start suggesting ideas. Tell them to address only you, and no one else at the table. Their idea can be a word, phrase, or sentence. Have them record each concept on a Post-It note which they peel off and arrange in front of themselves.
- Push them to generate at least 75 ideas. If they don't address an essential element of the space (for example furniture, technology, helpers or assistants) have them do so. Push them hard, keep the pace moving. It takes around 20 minutes to generate the 75 or so ideas.

Detail: Part 2

- Now instruct the group to collect their Post-It notes and convene at the large white board. They are not to speak to each other. If they have questions, they only speak to you.
- Have the members place their notes into related clusters on the wall. They may move their notes or other's from one cluster to another. Repeat several times that you want them to cluster their ideas into affinities or related groupings. Have them reduce the original number of clusters by merging related topics. You hope to reduce the number of clusters into 5-8 groupings. This exercise may take up to 15 minutes to achieve 5-8 clusters of ideas.

Detail: Part 3

- Tell the group they can now speak with each other. Instruct them to create a word, phrase, or sentence 'label' for each cluster of ideas that best describes what they have assembled. Invite them to be creative. Encourage them to work together on one cluster at a time. If they struggle over naming a group, reflect back to them the words they've bandied about as a way of focusing their attention and getting them to arrive at a label for the cluster. Each title will be written across the top of a cluster. Time for this component is 10 minutes.

Detail: Part 4 (in 2 parts)

- Instruct the group to continue talking by creating metaphors for each cluster of ideas (you may have to define 'metaphor'). It can be a word, phrase, or sentence. Push them to be creative. Have them focus together on one cluster at a time. Help them if they struggle by reminding them of what you've heard them say. Have them write each metaphor above its cluster. When all clusters have a metaphoric title, instruct the group, as their last effort, to create an all-encompassing metaphor for the ideas they've generated. It can be word, phrase, or sentence. Provide assistance as before to help them arrive at a metaphor. This exercise should be take approximately 10 minutes.
- Thank the group for their hard work. Indicate that you will share the overall findings with them after all the groups have met, and the data has been analyzed.

The data/ideas generated from each focus group are captured as transcripts of the exercise. Facilitators retain the Post-Its in their affinity groupings, and with the various titles—literal and metaphoric—assigned to each. Someone, ideally a facilitator since he/she is most familiar with how the data were derived, then writes a report summarizing the findings:

- major themes / categories
- relative merit of each concept and how it might incorporate into programming; and
- ideas which seem to have no place in the ultimate programming being designed.

The planning team, perhaps joined by neutral outsiders, look at the findings with the facilitators and other individuals associated with the project. Talk thru the findings. Sometimes the conclusions are irrefutable and frequently in line with the planning group's early vision. At other times the findings are surprising/unexpected/contentious. Unexpected results have the potential to deliver epiphanies to the planning group. With luck, the major themes suggested by the groups are consistent with your emerging vision, and enhanced by other qualities that you had not considered. When in doubt, trust the focus group findings over your own vision.

Technique: Lunch Invitations

When to use:

Invite client populations to lunch to explore a topic with customers in a non-threatening environment. Exploratory lunch discussions can be especially useful in the early planning / conceptualization phase of a building project. Feedback from invitees is personal in nature. It is melded into other assessment data to provide nuance, anecdote, and deeper insight. One can make a case for a perpetual series of lunch engagements with client populations as a way of tracking perceptions and soliciting ideas for needed changes in the library.

Degree of difficulty: low.

How Lunch Invitations work:

For a building / renovation program, imagine that you extend invitations to various populations of students to capture their opinions about an aspect of the initiative. Many of the invited individuals will not be known by library staff. They may not even use the library. Invitations may be issued randomly by perusing a directory, targeting a discipline, or relying on library staff or student advisory council to suggest individuals. Over the long run, most invitees should fit the "We don't know each other" category.

The invitation may be sent via email or phone contact. Ask for RSVPs if sending email invitations, and send a reminder of the lunch appointment 2 or 3 days in advance of the engagement. The lunch space should be comfortable, attractive, and away from disruptions. You may ask invitees to indicate from a list of lunch options what they prefer to eat. Sandwiches will usually suffice.

Lunch guests may number from 6 – 10, plus 2 or 3 library (and perhaps partner) personnel. A lunch series on a topic that schedules several lunch engagements should be coordinated and facilitated by the same person or persons throughout the series. These facilitators are tasked with taking notes, compiling findings, and making recommendations based on the findings. Consider providing a seat or two at the table for staff (rotated for each lunch) who are interested in the topic, or affected by outcomes that may arise from the conversations. They will typically be quiet observers. This provides these extra library staff a mentoring opportunity in engaging users, and helps them appreciate how feedback from the target audience is used to inform decisions. The lunches also provide opportunity for the library dean to witness, first hand, client reactions, wisdom, and vision for the library and can be deeply informative for a person who otherwise has few occasions to mix with students and faculty.

Lunch Engagement Example 1 "Information Instruction":

Imagine that the library wants to improve its information instruction program. As one component of a discovery process, lunches might be convened with faculty who teach required or watershed courses. Create a list of questions or topics to cover in advance of the lunch series. Typically two or three leading questions will provide an ample framework for discussion. Frame the questions to be open-ended rather than library-centric. You *would not begin* by asking "So how can we improve our instruction programs to help your students become more information proficient?" Take a more open approach by asking faculty what undergraduate courses they currently teach, and what the learning outcomes are. The next question might relate to what papers, presentations, or capstone projects the students are required to deliver. And from this, a next question might focus on the quality of the student submissions or presentations,

and where faculty would like to see improvement. Then one might ask the faculty to consider if there are skills or special training provided by others that would better prepare students to do a good job in the course (research methodology, writing, multimedia, etc.). A last question might ask them to imagine if there is a role for information fluency engagement in the course, and the shape it might take. Notice that the focus in a lunch engagement is on the invitees, finding out what they do in the classroom, what they assign to students, and their impressions of what is lacking in the students' performance and deliverables. This attention paid to their larger agenda is appreciated, and provides opportunity for the library to better appreciate the challenges they face. Only at the end of the conversation are questions posed about specific roles the library or its partners might play to support needed outcomes.

Lunch Engagement Example 2 "Learning Commons":

The library invites groups of students to lunch over the course of several weeks on the topic of a renovation to benefit undergraduates. It is early in the process, and the library is curious to know how students interpret this opportunity to transform a part of the library to help them with their academic work. General questions are posed: What are your majors, and what are the academic challenges you face? What kinds of academic assistance do you seek? What services and support should the university offer to help students succeed? What would you want to see in the library's renovated space that would give it great appeal for you? Where should we look for the answers?

The well-managed lunch conversation elicits lots of uncensored opinions. The facilitators almost exclusively listen rather than engage in extensive dialogue or reacting with one's own opinions. Your insight is being informed by your audience's wisdom, so make it an experience that squeezes as much out of them as possible. The well-managed conversation provides opportunities for deep understanding of issues, establishes relationships with new individuals, and demonstrates the library's commitment to engage its community to imagine its future.

Analyzing lunch audience input requires you to be objective, dispassionate, and without any personal agenda that influences your interpretation of the data. The facilitator / convener is responsible for doing the analysis and creating a report. Major themes will be identified, along with non-related remarks that might benefit other aspects of the library. Findings will be used to influence the emerging programming of the space, or to indicate where more user-centered assessment and discovery is required.

Technique: Structured Conversation

When to use:

For intensely concentrated focus on a constituent's needs. Use when you want to attain deep understanding of a topic. Degree of difficulty: moderate.

How Structured Conversations work:

We are often unpracticed and uncomfortable when interviewing constituents face-to-face. This is especially true when engaging faculty. The structured conversation provides a script of questions to pose to the interviewee, taking the pressure off of "what to ask next".

The structured conversation requires the interviewer to:

- create a set of questions appropriate to the discovery to be conducted
- set up interviews
- provide a context for the conversation
- pose questions
- listen carefully
- take comprehensive notes, and
- collect all interviews into a summary document that reports trends, themes, and the implications for the library's program.

With careful instruction, almost any staff member is capable of conducting the structured conversation. Additional benefits: creates confidence in the interviewer and an appetite for other conversations with clients. And by being personally engaged in data collection via the interviews, the interviewee attains a strong sense of ownership around the findings.

It should be noted that most structured conversations begin with open, user-centered questions that eventually end with library-specific questions. To only ask questions about the library's agenda can undermine the potential for unexpected insight, and curtail rich discussion and revelation. Subjects are "warmed up" by initial questions that have them report on familiar topics.

How the technique works:

Individuals like to reveal themselves, their work, their passions. When given the opportunity, most individuals open up quickly, especially if the questions posed are focused on what is near and dear to the interviewee.

- Prepare questions to ask (coordinated by the project facilitator or other individual, and vetted to be sure the questions will indeed produce the needed discovery).
- When interviewing faculty or researchers, spend time investigating the courses they teach, their research interests, and publications. You do not have to understand the content, just be aware of the overarching subject matter or class focus.
- Imagine interviewing a minimum of 15 – 20 individuals, so more than one interviewer may be used to share the burden. Interviewees may be strangers or familiar to the interviewer.

- Request an invitation to the subject's office (in the case of faculty, graduate students, researchers). If interviewing undergraduate students, you may invite them to your office or a comfortable meeting space.
- Indicate why you are conducting the interview ("the library is planning for a facility that supports graduate students, and we are interviewing a number of you to inform our ideas about what will be most valued." Tell the interviewee the interview will take no more than ___ minutes (30 is ideal, but 45 minutes to an hour may be tolerated if the individual indicates that's OK).
- As you pose questions, take careful notes. Indicate to the interviewee that you will not attribute specific statements to the individual.
- If statements are made that arouse your curiosity, ask for a deeper explication.
- After the interview, take the time to record a few personal observations. What was intriguing or surprising? What reported behavior or suggestions have the potential to influence planning?
- One or more individuals coordinating the structured conversation assessment will analyze all the interview notes, draw out common themes, and compile a report that portrays the findings, with special attention paid to potential services, resources, and engagements that might be incorporated into the planned space. Great effort must be expended to not interpret the data to suit one's predisposed thinking. One technique for keeping the findings objective is to share the data with disinterested or objective parties to contribute their own interpretations.

Sample structured interview:

Presenting problem: getting insight into undergraduate class deliverables and how the library and partners might better support student success in writing papers, doing effective presentations, and incorporating new media. In this phase, teaching faculty are interviewed. This may be followed up by structured conversations with undergraduates.

- Tell me a bit about the undergraduate courses you teach.
- What are the general learning outcomes you expect of your students?
- Are there major papers or research that students are expected to produce?
- How do you describe the major assignment, and what are the resources you provide to your students as information content, research methodology,
- What characterizes a good student product?
- What are aspects of the assignment that seem difficult for students?
- Do you have (additional) observations about writing fluency, articulation of argument / thesis, information content, and (if applicable) presentations skills, and media and visual fluencies?
- What resources or out-of-class assistance do you expect students to seek out?
- Do you expect the library or librarians to play a role in the assignment? What is it?
- Are there other agents on campus who have a role / responsibility in helping students succeed? What is this role?
- Do you have ideas about how the library can contribute more effectively to this big student deliverable?

Technique: Videotaped Interviews

When to use:

This is a useful interview technique (a variation on Structured Conversations) for acquiring deep insight into personal behavior and values. Use at the beginning of a planning process to better understand your clients' needs in the space.

How Videotaped Interviews work:

Videotaped interviews work the same as structured conversations, with the difference being the recording mechanism, and enhanced capacities to share and interpret the data. Each interview is videotaped, and (preferably) typed transcripts created of each interview. After the interview cycle is completed, videotapes of each interview are reviewed by the planning team to ascertain meaning, implications for the building program, and unstated opportunities for engagement. The time commitment is considerable, but the payoff can be considerable for planning. The videos provide an immediacy and "real voice" of the customer with the potential to surpass the effect and value of any other data gathering technique.

Detailed description of the technique:

Videotaped interviews are built on the structured conversation format. The methodology is identical, with the single addition of the recording format and its power to deliver deep insight.

Each interviewee is informed at the time the appointment is made that the interview will be videotaped. You assure the individual that the only people who will view the tape and read the transcripts are those associated with the project. If quotes extracted from the interview are used in subsequent publications or public postings, you return to the interviewee with a release / consent form to sign (or follow university procedure regarding human subjects). Two staff are required for the videotaped interview, one to pose questions, the other to work the camera. Additional staff may be recruited to transcribe the interviews for later review.

Sample interview:

Let's say you want to gain a holistic understanding of PhD research and writing. To do this, you interview PhD students who are actually engaged in writing by going to their primary workspace. You want to see how they work with and organize materials, see the tools and amenities they bring to their workspace, and to have them demonstrate various critical components or moments in their work. The interview should reveal their ingenuity in organizing, consuming, and generating output. And you hope to understand what frustrates them, poses challenges to their work, and the skills they wish they had to be more productive.

Questions:

- So here we are in your principal workspace. Please describe the tools, boxes of materials, notes, and other items we see here.
- What sorts of information / documents do you collect?
- In what formats do you store this information, and how is it organized?

- What problems do you encounter with organizing all this information?
- What are the sources for the information you need, and how do you acquire it?
- What processes do you use for staying up-to-date in your field of study?
- Who are the most important individuals in your work, and how do you communicate with them?
- How do you benefit from each of these important relationships?
- If you could design the perfect workspace, what would it look like?
- What are the challenges you share with your fellow PhD cohorts?
- If one aspect of the way you work could be improved, what would it be?
- Is there a role for the library or other agency to help you with your work?

Videotape the individual as she talks. As she describes elements of the workspace, have the camera focus on the items being discussed. Be sure to completely capture all elements of the workspace, including lighting, aesthetics / decorations, notes / reminders, food, etc..

As the interviews are completed, transcribe them for future reference. Then convene the interview group to view each interview. This will be done in several sessions because of the abundance of material. Bring an open mind, and charitable attitude to each viewing. You have been given a generous opportunity to peer into someone's private life, so respect for the interviewee is essential – and it prepares you to have an unbiased mind.

Make note of all you hear and see on the tape. Consider both explicit and implicit meanings. Stop the tape when you see something interesting to point out or consider. You are looking for library opportunities to improve the PhD research and writing experience, and these may be different from anything you have supported up to this point. Be open-minded, bold, and alert to possibilities.

After all interviews are reviewed and discussed, write up the principal findings and translate them into potential action items, or as ideas worthy of further investigation or thought.

Technique: Sand Boxing / Experiments

Definition of terms:

Sand Boxing is a technique for testing concepts. It functions as an experimental space or “laboratory”, providing the opportunity to run small, affordable tests of ideas to determine efficacy, scalability, implications for staffing, programming, etc. for future deployment.

When to use:

The planning process may reveal service or resource concepts that are untested or unfamiliar. If time allows, and prior to building the new space, experiments should be run on the concepts to test their appropriateness for the new space. By running sand box experiments on a small scale (often using furniture, technology, and resources at hand in a mock up), risk can be mitigated down the road, and options discarded prior to construction and organizational commitment. Even in new or renovated facilities, space should be identified that might be re-purposed for a short time to test new concepts as they arise.

How Sandboxing / Experiments work:

Identify a space that can be converted for the experiment. It may be in the library (typically) or in another logical location (perhaps in partner’s space, especially if it relates to the partner’s service obligation). Attempt to launch the experiment using inexpensive materials or existing materials and resources. Determine at what scale, staffing level, and completeness the experiment should be set up. Consider how you will assess the experiment when it is launched. Be clear about the vision you are testing so that the experiment is worthwhile.

As the experiment runs, and data are gathered, analyze the feedback and conclude as to its efficacy. Should the test be altered to assess another aspect of the imagined service or resource? Have you done all you can to give it fair trial? Whatever the outcome, you have answers in hand that help you know whether to include the element into the building plans, to modify it, or to drop it altogether.

Technique: Campus and Outside Experts

When to use:

Clarification: experts are really more a resource than a tool, but any learning commons or other building enterprise requires experts to weigh in and provide counsel to achieve great outcomes. Experts are helpful both at the start of a renovation or building program, and during the course of planning and implementation. Experts are used to give shape to assessment instruments; to tap their knowledge in areas that are unfamiliar to the project team; and to be a sounding board for decisions that are being made. Today we see the rise of anthropologists (either on library staff or from elsewhere in the institution), ergonomists, human / computer factors experts, furniture experts, technology experts, and others in library planning. Most campus experts will offer their counsel without charge. Consider bringing in experts from outside if the needed expertise doesn't exist within the institution.

Degree of difficulty: low.

How Experts work:

Examples of using experts to assist with planning learning commons are provided here. This is not an exhaustive list, but illustrative.

- **Anthropologist** – can recommend what discovery techniques may be best for a particular type of discovery, as well as help with crafting the assessment instruments, or reacting to a draft instrument and technique. Experts can also help to focus questions so that the data acquired is essential to user-centered programming. Experts can also provide assistance with training staff in using and interpreting the results of assessment techniques. Anthropologists may assist with identifying elements that help to create a feeling of community in the new space.
- **Ergonomist** – helpful in articulating characteristics of furniture, lighting, and aesthetics that contribute to comfort and utility. These individuals may have useful contacts in industry who would contribute their expertise . . . especially major furniture companies.
- **Human / computer factors** – these individuals may have insight into ideal work surface dimensions, size and placement of display screens, etc..
- **Computer / technology** – can make recommendations of your technology team or IT partners re: workstation capacities, software and productivity applications, infrastructure capacities, soon-to-be-released technologies, etc..
- **Education technologists** – provide assistance with constructing or reengineering instruction programs, or when shifting information fluency programs to student-engaged pedagogy. May also assist with identifying instruction and training components deployed in technology centers like multimedia studios, data analysis centers, etc..
- **Student research assistants** – some students, especially in graduate programs, may be interested in conducting assessment for you, or exploring solutions for a presented challenge. Consider students in architecture, anthropology, human / computer studies, and even engineering. In the best circumstances, the work they do for you complements work in a course, so they may not require payment.

Technique: Student and Faculty Advisory Groups

When to use:

A good time to set up a student or faculty advisory group is at the beginning of a building project. The advisory group represents a formal commitment by the library to give these constituents a place at the planning table, recognizing their potential to: gather information, react to proposed programming directed to students or faculty, and to run interference with their colleagues or peers when challenges arise. Degree of difficulty: moderate to high.

How Constituent Advisory Groups work:

While faculty advisory groups or faculty library committees have long existed, they are usually tasked with modest responsibilities in the library's agenda. The advisory group you set up should be empowered to have substantial responsibility for contributing to program planning. Caution: if student or faculty advisory groups are not used in essential ways, the gesture can become a liability by demonstrating that the library only pays lip service to its clients. The library must give the group meaningful work and responsibilities related to the building project.

The advisory group is facilitated by a library leader, frequently the AUL for public services, or the library dean who sets the agenda for the group. In the case of a building project, the project facilitator will coordinate the engagement of the advisory group.

To effectively sustain an advisory group requires a serious commitment on the part of the library. A vision and goals for either a student or faculty advisory group should be created in advance of recruiting members. The vision and goals should be shared with prospective members. Each prospect should have an opportunity to "interview" with the advisory group facilitator and the building project leader to get a sense of their potential contribution and work load.

For learning commons planning, a student advisory group seems a logical vehicle and complement to the enterprise. Your aspiration should be to recruit the best students, leaders who have visible roles in principle student organizations as well as being scholars. Individuals to consider are editors of school newspapers; members or officials of honor societies, professional societies, and influential student organizations; current or former officers of student government, etc.. The greater the name recognition and regard for the student, the more politically effective these individuals might be. Their track records as leaders help to assure that they will be productive and influential in the library's agenda to deliver a learning commons or other student-focused programs.

Example of an actual student advisory group's charge and mission

Mission and charge:

The Library is in a dynamic period of change. With other campus partners, the Library is developing services, resources, and physical spaces to have a positive impact on student learning, in step with changes in pedagogy. Undergraduates are the preponderant users of Library spaces. They, along with graduate students, must be engaged in a sustained dialogue with the Library to assist with the creation of superior learning environments. We believe an effective mechanism for engaging students in this dialogue is via a student advisory council.

The work of the Library Student Advisory Council complements the strategic vision of the Library and its partners-in-collaboration. The primary focus for this Council is to assist with the evolution and renovation of Library spaces to facilitate student learning and productivity, and to revitalize "library as indispensable place" for student success. The Council also provides commentary and recommendations regarding other aspects of the Library's agenda. The Council is imagined to be a permanent component of Library administration.

Characteristics of the Library Student Advisory Council:

- The Council is comprised of 8 – 10 student members.
- The composition and appointment of new student members is determined by the Council in consultation with Library administration. Each student member nominates his or her successor.
- The Council is facilitated by the Library. The facilitator shapes the group's agenda, provides resources, and communicates critical information between Council and Library (and other critical partners). The facilitator assures the work of the Council complements the mission and goals of the Library, and of its critical partners.
- The Council's agenda complements the work of the Library administration and its partners to create outstanding learning spaces, services, and resources.
- The Council assists with capturing, evaluating and interpreting the feedback, opinions and wisdom of students regarding Library improvements.
- The Council is committed to long-term, critical thinking about essential issues related to student learning outcomes.

Engagement of a student advisory council around a learning commons:

Imagine that these students could be volunteers to assist with discovery . . . sitting in on or helping to facilitate lunch engagements, affinity focus groups, design charettes, etc.. With each element of discovery that is intended to inform programming of the learning commons, the council will receive an update and be invited to respond to the data and its interpretation. Council members could also assist with inviting students to focus groups.

As the building project begins to move to physical solutions, the student advisory council should have ample opportunity to weigh in, question decisions, and make recommendations. Ultimately you look for their buy-in and endorsement. By engaging them in all aspects of planning (as much as they can tolerate with their busy schedules), their sense of ownership and confidence in the outcome will be greatly enhanced, and their role in portraying the emerging vision to their fellow students will be made easier.

Technique: Learning Commons Oversight Council

When to use:

An oversight council is an agency rather than a tool, but with assessment data as its lifeblood. The oversight council has primary responsibility for seeing that the new space and programming are working as intended. It should be created no later than opening of the new space. Degree of difficulty: moderate.

Detailed description of agency:

Imagine that you create an oversight council of individuals representing commons collaborators, primarily staff with direct responsibility for, and engagement in, your learning commons, as well as the commons manager if there is one (recommended). The council manages, observes, assesses, and evolves the learning commons. It is a necessity if the commons is a collaboration of two or more units (e.g. the library and IT, CETL, student services, counseling, tutoring). The council is also suitable for commons that are exclusively staffed and managed by the library. It may be facilitated by one individual or co-facilitated.

Most decisions of the council regarding staffing, learning outcomes, faculty engagement, technology performance and refreshment, community building, finances, etc., are informed by qualitative and quantitative assessment data. In a learning commons, there are many elements to track. Here is an illustrative list of the types of data that might be useful for the advisory council (and staff working in the commons) to have for making decisions:

Quantitative

- Heads counts at various times in the 24-hour cycle
- Daily gate counts (especially noting use over special extended hours)
- Productivity software being used, including type, frequency, and duration of use
- Workstation logins and average time spent at the station
- Frequency and type of one-on-one assistance at each service point
- Frequency and types of training, attendance, and disciplines of students and faculty at training sessions and classes run in the commons
- Frequency of use of reserve-able spaces (presentation practice spaces, group study rooms, etc.), and statistics on the performance, durability, and efficacy of each space.
- Professor & course affiliations of students working in the multimedia center
- Uptime / downtime of workstations
- Types and number of peripheral tools being checked out (digital cameras, camcorders, laptops, webcams, wireless projectors, etc.)

Qualitative

- Lunch engagements with students and faculty who are known to use the commons, and that focus on a programming theme or service in the commons. What are their observations, recommendations, criticisms, etc.? (Tool: Lunch Engagements)
- Interviews of students (and faculty) at work in the commons and / or throughout the library to understand what they are doing, what is working well, and what can be improved (Tool: Survey Tours with Photos)
- Reviewing all “send us your comments”, suggestion box, and “flip chart” feedback regarding the learning commons for user perceptions and suggestions (Tool: Surveys / Comments)
- Ongoing conversations with front line staff on all shifts to hear where they are getting good uptake of services, and where there are problems. Student assistants should be included if they have engagement responsibilities in the commons.
- Meetings and interviews with academic faculty, curricula coordinators, and faculty whose students use assets of the commons. Identify courses to target for engagement and training in the multimedia center, to refine information instruction sessions, and to identify skills training to benefit both students and faculty.
- Pop-up exit surveys on workstations to elicit user comments around use of resources on the workstation and in the commons, and with an invitation to suggest what would make the workstation tools or peripheral services more beneficial.
- One or more easy-to-identify staff living on the margins of the commons (especially a commons coordinator) whose door is always open, and marked with an invitation to customers to drop in and share their experiences in the space.
- Data generated by LibQUAL+ and other survey instruments that may be *open-ended* or focused on a topic. These surveys generate myriad suggestions for improving the user’s experience in the built environment. (Tool: Surveys Comments)
- Soliciting internal meeting minutes from library departments and partners that relate to the commons or other built enterprise.

The council meets regularly to review the health of the built enterprise. It identifies gaps in needed data, then determines what assessment approaches will supply the most comprehensive and trustworthy data to interpret and work from. The council keeps the vision and goals of the commons up to date.

The decisions of the advisory council should be shared broadly (as appropriate) with all partner units and individuals working in the commons. The advisory council might also establish a Web site for the commons where seminal documents are posted portraying how the commons came to be, data used to inform programming, and new documents that record recent decisions about new directions, services, etc..

Technique: Report cards / Post-occupancy assessment

When to use:

At the moment a new facility / renovation is open to the public. Planners will have learned a lot during the process. Some elements were easy to deliver, others not so. The report card is prepared by participants to inform the library (and partners) about how to do a better job with the next renovation. The report card also helps to uncover issues that staff feel are unresolved or require additional attention. Degree of difficulty: moderate.

How Report Cards work:

Space planning projects typically engage a number of individuals from the library and partner organizations. The work will likely have been apportioned or assigned across several work groups or teams of individuals. These teams may have focused on: staffing, technology, classrooms, furniture, service points, communication / PR, programming, leadership / coordination, etc.. Whatever the breakdown, much will have been learned in the process. The report card / post-occupancy assessment provides planners with insight into how to manage a project more successfully in the future. It provides insight into perceived lack of preparation in some quarters, or issues that were overlooked and still need to be addressed.

Depending on how the work was apportioned, the project facilitator asks each group to provide a self-assessment of the thing they delivered. Does it appear that the service, resource, or technology is working well? Are there staff training issues that haven't been met? What is the early feedback and reaction from customers, and have they identified problems or a sense of what else is needed to make the property work better? Was the planning process handled well, and how could it have been improved?

The reporting entities may want to assign a grade to their project to indicate their perception of the quality of their work. As reports are received by the project coordinator, a summary document is created that distills the feedback into its essence, with commentary / reflection from the coordinator. 'Lessons learned' should be a part of the summary document. Solutions for important issues should be proposed or enacted.

This is a practice in accountability and closure. It signals to the organization(s) that their efforts are appreciated and that lessons that arise from the report card will inform future work. The document might also be shared with all members of the affected organizations as a public expression and accounting for the thing delivered.

Technique: Learning Commons Building Planning Process

Elements, Risks, Outcomes, and User-Centered Assessment

Introduction:

The preparation and planning for a learning commons or related project, especially a collaboration with partners outside the library, must be carefully considered. The process must result in a vision and goals, programming elements, outcomes, staff engagement, and customer insight that leads to the best possible built environment and programming.

Here is an outline of the basic elements of a well-considered learning commons building planning process. This guide may also have value for other built environments and customer engagements. Each institution's unique circumstances will influence the type of process selected. The best building programs result from planning processes that deeply engage the organization, students, faculty, and logical campus entities.

Planning Process Highlights:

Ingredients of success:

- Select talented individuals to both lead and comprise a senior planning team
- Create a mission and goals centered in customer needs and outcomes (not those of staff)
- Devise a planning process that is comprehensive, flexible, inclusive, transparent
- Supplement the senior team with topical teams focused on developing critical elements
- Approach the project with few preconceived ideas or solutions
- Don't rush to physical solutions . . . forestall concrete solutions to the last moment
- Conduct deep user-centered assessments that lay groundwork for understanding potentials and achieving goals
- When interpreting assessment data, invite objective outsiders to review your logic
- Communicate often (with constituencies, teams, affected organizations)
- Create excitement for the project; the leader should be an effective "cheerleader"
- Experiment / test / "sand box" emerging ideas as time allows
- Push for bold, flexible solutions
- Expect that new, unfamiliar, or "hybrid" jobs will emerge
- Look for furniture, infrastructure, and built environment solutions that are easily changed; the facility will continue to evolve after it is delivered
- Vet your emerging vision with all affected parties (staff and consumers); solicit feedback, critiques, alternative solutions until the last moment

Traps to avoid:

- Failure to conduct needed assessment / discovery
- Failure to interpret the data correctly (self-serving; to bolster preconception)
- Failure to communicate the emerging vision to all staff, students, and faculty
- Failure to adequately engage staff in planning and create buy-in
- Resisting transformative models of service by playing it safe & avoiding conflict
- Creating a co-location of services rather than a genuine collaboration
- Failure to ground the vision in customer needs and success

- Space solutions that are difficult to modify as needed changes are identified
- Failure to embed new approaches to information access and exposure to collections
- Failure to create bold new staff positions
- Failure to make draconian but practical decisions re: reference collections, service points, staff offices . . . when faced with options, give up space to users
- Resistance to conduct on-going assessment after the enterprise is built
- Failure to provide students opportunities to create community in the spaces
- Failure to embed a comprehensive suite of services to address each moment in the learning and skills development cycle.
- Creating spaces that only perform in one way, for one purpose, rather than multi-functional across the 24-hour spectrum

Example of a planning process that might be adapted to your circumstances:

Leadership / facilitation

In most cases, a committee or senior team is tasked to deliver the learning commons. There should be an official written statement from library dean, perhaps co-written or co-signed by other top stake-holders, announcing the project, and appointing the leader(s). Other members of the project management team may be identified in this “launch document”. This announcement indicates why the project is important, ideally includes an endorsement by the Provost or other top official of the institution, and suggests that the project will enjoin many individuals both within the organization(s) and outside. This communiqué might also indicate that difficult decisions will be made for the good of the enterprise, even as the welfare and engagement of staff is guaranteed.

The senior team is facilitated by a single leader or co-leaders. The facilitators / leaders are chosen for their abilities to: organize and inspire teammates, communicate effectively, work comfortably with complexity and tight deliverables, build consensus and reduce friction, think beyond the common or ordinary way of doing things, gain the respect of their colleagues. They are not necessarily the most senior members of the organization. Rather, they are chosen for their track records and perceived ability to deliver the goods.

Senior team composition

If the project is a collaboration, the senior team should have proportionate or balanced representation from each major partner. The team should be no larger than 6 or 7 individuals, including leader(s). One of the senior team members should be familiar with using project management software (otherwise, such an individual might assist the senior team with this). Individuals are well connected with their organization’s programs, and enjoy the respect of their peers because they are trusted, forward-looking, ask hard questions, communicate effectively, and are deeply committed to the new enterprise.

First Orders of Business

1. *Establishing rapport and trust:* This begins with co-facilitators if there is more than one leader. The co-facilitators should have great trust and confidence in each other, and promise their commitment to the project. The co-facilitators may be tasked with identifying the other members of the senior team, in which case they are looking for the best talent (described elsewhere). Once the other senior team members are identified, committed, and announced to the organization(s), the senior team convenes. It spends its first meeting or two getting to know each other (if the players are unfamiliar to each other). All aspirations, concerns,

issues they bring to the team should be brought up in confidential conversations (unstated issues will later dog the process, so be candid and forthright about concerns).

2. *Agreeing on planning process:* The team should agree on the planning process they will follow. A proposed planning process may have been developed by the facilitator(s) in advance of these first meetings. If not, the senior team identifies the process that will be used. This is the time to adjust the planning process so that all are confident that it will serve the task well.
3. *Vision and goals:* The team first drafts a vision and goals for the project. This is vetted with others, including the library dean and heads of the other partner organizations. Ideally, the vision complements a primary element(s) of the institution's mission, and may focus on facilitating student learning, critical skills development, incorporation of the library's information agenda, and increased student expertise in various fluencies and research competencies.
4. *Identifying important milestones:* The team should receive a deadline for doing its work that includes time for user-centered discovery and programming, vetting with appropriate parties, interpreting the programming elements into a physical floor plan, cost estimation and corrections to conform to financial constraints, bidding, construction, and occupancy. Project management software should be used to guide the work.

Engaging the right mix of individuals for work groups:

5. Much of the work to be done will be assigned out to others in the organization(s). The topical 'work groups' will report to and be under the guidance of the senior team. These additional individuals will likely come from the departments most affected by the learning commons (reference staff, instruction staff, education technologists, systems experts, units engaged in mentoring, tutoring, advising, writing, presentation skills, etc.). And the invitation to engage may be opened to the larger organization so that others have the potential to contribute.
6. In the first meeting or two of the senior team with assembled staff, the vision and goals of the project are presented, assurances are made that no one will lose his or her job in the new scheme, and with assurances that no decisions have yet been made about how the learning commons will be articulated (Note: few if any specific decisions about programming should have been made by the senior team; specific solutions, especially physical or building solutions, should be set aside until these assumptions can be thrown into the mix of all that will be vetted). Most of the first and second meeting (if needed) prepares potential volunteers to understand the scope of the project and to portray themselves to the group. Each person, including senior team members, is invited to tell the group what her / his current job responsibilities are; personal aspirations for the project; and what may be causing anxiety, fear, or consternation. By getting each person's 'baggage' and expertise on the table, there arises an appreciation of each individual (and insight into impediments that may need to be addressed or which suggest the individual may not be a good addition to a). This is especially important in collaborations with other units where little is known of the other program or staff responsibilities. If this "getting to know you" step were omitted, the project would move along much more slowly and with weaker results. The project facilitators help each person to feel welcome and appreciated. They also provide assurances that they will keep the project on track and accountable.

Launching work groups:

7. If it has not already done so, the senior team determines the various topical or related deliverables that will flesh out the project: technologies (productivity applications, infrastructure, flavors of workstations); training requirements for staff; consolidations / new efficiencies in service programs; consolidation of service points; characterizing the functionality of special spaces. The senior team will use these main themes to create individual documents for each describing brief goals, deliverables, deadlines, resources at hand. These documents become the guides for the work groups. (Note: if these work group documents have been created in advance of the volunteer meetings, share them with the volunteers to further illustrate the nature of the work for which they are volunteering themselves.)
8. At the next large group meeting of potential volunteers, distribute and explain the work groups to be created. Take time to answer questions and provide clarification. Indicate that each work group will select its own facilitator or co-facilitators. And announce that one member of the senior team will be assigned as a resource to each workgroup to provide connection back to the coordinators, handle communication issues and questions, and so that the senior team has a witness to the working of each group. Then invite individuals to indicate by writing on slips of paper the teams (1st and 2nd choices) they would like to work on.
9. The senior team meets to review the preferred assignments, right balance of talents for each work group, and seeks additional, complementary individuals if that seems needed. Take the time to create strong, balanced work groups. When completed, announce the decisions to selected members, and invite them to hold their first meeting with their senior team facilitator to select their own work group facilitator(s). Review the document created by the senior team for their work, and begin work.
10. Provide consistent support and encouragement to the work groups. Assist the work groups in conducting needed assessments. Consider their logic, the techniques they will employ, and offer to provide assessment assistance if it is needed. As assessment data is gathered and interpreted, the senior team will review the logic and emerging solutions and provide critical feedback and course correction if it is warranted. You want each work group to own and take pride in its work, but you also want to keep them on track and focused on the best outcomes. The senior team takes all input and recommendations from workgroups "under counsel". It is the senior team that makes final decisions about all components of the project.
11. As much as possible, make project documents, drafts, working papers, resources materials, and gathered data available to everyone in the project. This provides everyone the opportunity to see what is going on, and may inform their work. The senior team leader(s) incorporate reports, recommendations, and other materials arising from the work groups into a master document(s). This distillation of decisions related to every aspect of the built space results in a comprehensive narrative of the program that is used to create working drawings, architectural plans, etc..

Communicating rising vision and interpreting it into a physical plan

12. At occasional intervals, hold meetings with library and partner staff to update and to invite reaction to rising vision. Also consider inviting outside experts to react to your plan. Incorporate helpful suggesting into the planning process. Toward the end of project planning cycle, share the vision with the broader campus in one or more community meetings. Well-informed suggestions and reactions may still influence the final environment and programming it supports. For the most part, these last public meetings are intended to portray your vision to the institution, and create excitement around the enterprise.
13. Create a document that combines all elements of the program into a single narrative, with useful support documents appended. Bring in campus architects, facilities planners, furniture reps, etc., for their reaction and suggestions. It is the responsibility of these agents to help you physically realize your vision, and they will have useful observations to make. Have the architects / facilities planners create a floor plan of the imagined facility to share with others. Final assessment / reaction gathering should be conducted to test the building concept, locations of services and resources, and to determine if flexibility and multi-purposing of spaces can be achieved. Imagine running a series of design charettes (Tool kit: Design Charettes) to test your floor plan and to elicit the wisdom of users in this very last phase. Incorporate insight / improvements into the plan. Hand off to appropriate campus officials for specs, bid documents, etc..
14. Use the interval prior to the delivery of the built space to work on staff training, furniture and technology selections and purchases, creation of an advisory group to manage the built enterprise, etc..
15. Once the environment is built, begin to assess it, make improvements, etc.. The new space and services should be considered a grand experiment that continues to evolve to meet primary goals.

Case Study: Learning Commons A

Endeavor University:

“How do we make the case for a learning commons?”

Current status of library:

Built in 1960, with modest cosmetic updates to some areas of the library in the intervening years. Its student body is an equal mix of those living on and off campus. Attendance in the library has fallen off for the past decade as more students opt for studying in newer dormitories and “found spaces” in various buildings across campus.

The print collection, currently growing at a modest rate due to the transition to digital journal subscriptions, fills up 90% of the stacks. In the 50 years since the library was built, some user space was sacrificed to collection storage. Library outreach is achieved via information components taught in some academic courses supplemented by topical classes and training sessions offered in the library. Reference transactions are falling, but the print reference collection has not been deeply reduced. Book circulation has remained steady. A large space combining visual collections with viewing equipment for all formats is scarcely used. Use of special collections has fallen off slightly in the past few years. A few academic courses require students to use certain collections. The campus IT division runs a popular (but rather grungy) computer lab on the lowest floor of the library.

Opportunity:

The provost has recently toured several other campuses. On the tour, she was impressed by a recently opened learning commons in a competitor’s library. Upon her return, she has tasked the library director to determine what it will take to create a learning commons in Endeavor University’s library. The library director has been given six to nine months to create a document for learning commons installation that includes detailed programming and cost estimates. The provost suggests that the library director should consider working with the campus IT office and student services offices as potential partners in the learning commons.

What assessment can be done to inform the vision for a learning commons?

- How will the needs of students and faculty be determined?
- How will the roles of the potential partners be identified?
- What sorts of information and data will you want?
- What assessment tools / techniques might be used to get needed data?

What are 3 important things you learned from the exercise:

1.

2.

3.

Inspired by this exercise, what 3 things might you find useful to do when you return to your library?

1.

2.

3.

Case Study: Learning Commons B

Experienced University:

“How do we expand the undergraduate learning commons for faculty and grad students?”

Current status of library:

A learning commons, in partnership with two other campus units, was installed five years earlier for undergraduates. The enterprise offers a full spectrum of computer workstations, support services, skills training and mentoring, along with a café, interposed casual areas, and group study rooms. It has been wildly popular, and even draws in a significant proportion of graduate students to the workstations, informal study spaces, writing clinic (though tailored for undergrads), and presentation practice rooms.

The library committee of the faculty senate has proposed that the library next concentrate on engaging faculty and graduate students in a suite of services, resources, training, and spaces to meet their teaching and research needs. Skeptics both inside and outside the library believe there is no role for the library to play, and suggest that it continue to attend to undergraduates.

Opportunity:

The provost and library dean have charged a task force to determine how the library, perhaps with other campus partners, might find new ways to help faculty and graduate students. They would like to see a fairly well developed plan for their consideration.

What assessment can be done to inform potential engagement with faculty and graduate students?

- How will the needs of graduate students and faculty be determined?
- How will the roles of the potential partners be identified?
- What sorts of information and data will you want?
- What assessment tools / techniques might be used to get needed data?

What are 3 important things you learned from the exercise:

1.

2.

3.

Inspired by this exercise, what 3 things might you find useful to do when you return to your library?

1.

2.

3.

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- Project Kaleidoscope Web site for a rich array of planning documents and "think pieces" around planning new academic spaces. While there is a strong focus on science facilities, extrapolations can be made to apply to other built environments. <http://www.pkal.org/collections/Publications.cfm>



