



# Listening to Users: How User Communities Can Inform Design

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Panel Discussion

# Panel Discussion Overview



- “Listening to Users: The California Digital Library”  
Felicia Poe, CDL Assessment Coordinator
- “The Calisphere Project”  
Ellen Meltzer, CDL Information Services Manager
- “The Web-at-Risk Project”  
Tracy Seneca, CDL Web Archiving Coordinator
- Discussion, questions

# The California Digital Library



- Established in 1997 by UC Office of the President
- 80+ employees
- Develop tools and services for 10 UC campus libraries
- Access services, digital preservation, scholarly communication, bibliographic services
- Located in Oakland, California

# Coming to Know Our Users



- Early recognition of user-centered design
- CDL Assessment Program established (2004)
  - Two FTE; additional solid knowledge within CDL
  - Logical evolution of the CDL maturation process
  - Core activity; organized and supported
  - Promotes collaboration with user groups, grant partners, and others outside organization

# Why Involve Users?



- Digital services and tools are expensive, risky endeavors; limited resources.
  
- Goals:
  - ❑ Facilitate an understanding of how and why CDL services are utilized.
  - ❑ Better position the CDL to meet the needs of the campus libraries, our service users, and the expectations of university administrators.
  - ❑ Integrate user needs assessment and evaluation activities into design process.

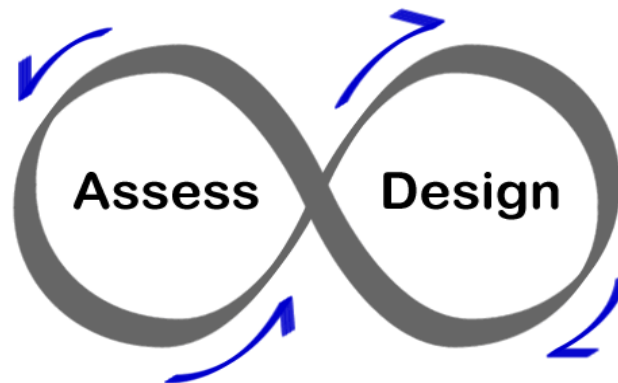


# Strategy:

## Allow Users to Inform Design

Involved at several stages of project/service lifecycle

- Early stage user needs assessment interviews
- Mid-stage UI usability testing
- Post-launch reviews



# Step 1: Plan and Define Purpose and Objectives



## Plan

Gather

Analyze

Present

Apply

- “Determine the extent to which libraries value online exhibit building and how they view this activity within the context of their organization as a whole. Identify organizational and barriers to building online exhibits.”
- “Understand the perceptions of the campus library staff about the communication they currently receive from the CDL and what is available to them. Determine the types of information the campus library staff need from the CDL in order to perform their work.”

# Step 2: Execute Plan and Gather Relevant Information



Plan

**Gather**

Analyze

Present

Apply

Methodologies include:

- Interviews
- Focus groups
- Online surveys
- User profiles / personas
- Usability testing
- Get out on the campuses!



# Metasearch Project:

## Understanding Search Behaviors



- Search across multiple distributed databases
- Range of possible audiences – what are their research behaviors? Do they need metasearch?
- Four phases of user feedback
  - 1<sup>st</sup> – FG: humanities / social science undergrads (5)
  - 2<sup>nd</sup> – Out-of-the-box user interface: undergrads (11)
  - 3<sup>rd</sup> – FG: humanities grads & faculty (14)
  - 4<sup>th</sup> – FG: health sciences grads & medical doctors (25)

# Metasearch Project:

## Focus Group Objectives/Questions



### Plan

Audience: Humanities faculty / grad students

Gather

Analyze

Present

Apply

- What are the research *behaviors* of users who possess domain expertise?
- What are the research *needs* of users who possess domain expertise?
- Can the metasearch tool play a role in research for users who possess domain expertise?

# Metasearch Project: Information Gathered



- Plan
- Gather**
- Analyze
- Present
- Apply
- “Research is usually serendipitous. I’ll page through hundreds of catalog records.”
  - “I open two browser windows, one for Amazon, one for Melvyl. It’s a way to vet. I browse via Look Inside and following citations.”
  - “I’m overwhelmed by the vast array of databases and rely on a handful of familiar choices. I don’t venture out.”

# Metasearch Project: Findings & Recommendations



- Plan
  - Gather
  - Analyze
  - Present
  - Apply
- Welcome the ability to work within a single interface to search several resources
  - Prefer a basic search interface with choice of fielded searching & limits
  - Table of contents and bibliographies are highly valued discovery tools
  - Want database recommendations
  - Compatibility with EndNote is essential

# Metasearch Project:



## Present Findings/Recommendations

- Plan
  - Gather
  - Analyze
  - Present**
  - Apply
- Narrative report
  - Basic list of findings / recommendations
  - Presentation to full CDL development team via meeting
  - Presentation to campus project partners via conference call

Reports publicly available:  
[www.clib.org/inside/assess](http://www.clib.org/inside/assess)

# Metasearch Project: Present Findings/Recommendations



- Plan
- Gather
- Analyze
- Present
- Apply

# Step 5: Apply (continuously!)



Plan

Gather

Analyze

Present

Apply

- Build time for user feedback into the project plan and grant proposals
- Foster connections between service managers, developers, and assessment team members
- Create an organizational culture of user awareness and respect

# How and Why: The Basics Reviewed



Plan → Gather → Analyze → Present → Apply

- Facilitate an understanding of how and why your tools and services are used.
- Better position yourself to meet the needs of your users and the expectations your funders.
- Integrating user needs assessment and evaluation activities into the design and development process results in better tool and services.



# Questions?



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