INVESTIGATING USER NEEDS AND APPLYING IT TO YOUR PLANNING

Dave Green
Project Director, ERIAL
Associate University Librarian
Northeastern Illinois University
Investigating user needs: methods

ERIAL: background and structure

Investigating user needs: ERIAL as case study

Research process interview: example and exercise

The power of observing the users’ experience

Ethnographic tools and how to use them
So You Want to Do Anthropology in Your Library?
or
A Practical Guide to Ethnographic Research in Academic Libraries

Andrew Asher
ERIAL Lead Research Anthropologist

Susan Miller
Resident Anthropologist, ERIAL Chicago Libraries

The ERIAL Project
Exercise:

- What are your current methods of investigating user needs and how do you use that data?
- What do you want to know about your users that you currently don’t know?
Investigating user needs: methods

- Market research: “What people say”
- Ethnography: “What people do”
- Participatory design: “What people make”*

Investigating user needs: methods

Figure 1: Topography of Design Research

Investigating user needs: methods

- Ethnography: the art and science of describing a group, culture, or social process
- Ethnography involves:
  - Study of a local culture
  - Fieldwork
  - Multiple methods and data sources to develop a full picture of a process and its context
Using qualitative methods like ethnography

“...builds evidence in a manner similar to a court case, examining individual observations and gradually building a holistic picture of phenomena. This approach can have great explanatory power because qualitative data can directly demonstrate what research subjects actually do, think, and feel in the midst of real-world situations.”

A Practical Guide to Ethnographic Research in Academic Libraries (The ERIAL Toolkit) p. 3
ERIAL: background and structure

- Funding: LSTA grant from the Illinois State Library totaling $337,000
- Funding period: two years
  - 2008-2010
- Applied research project
- Participants: five Illinois academic libraries
  - About 25 librarians
  - Two full time anthropologists
- www.ERIALproject.org
ERIAL: background and structure

- Five academic libraries

![Logos of UIC, DePaul, IWU, NEIU, and UIS combined to form ERIAL]
## General institutional profiles

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<th>IWU</th>
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<th>DePaul</th>
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<th>NEIU</th>
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**ERIAL: background and structure**

- **General institutional profiles**

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ERIAL: background and structure

- General institutional profiles
ERIAL: background and structure

- **ERIAL organizational structure**

  - **Northern Libraries**
    - DePaul University
    - Northeastern Illinois University
    - University of Illinois at Chicago
    - Susan Miller
      - Resident Anthropologist

  - **Central Libraries**
    - University of Illinois at Springfield
    - Illinois Wesleyan University

  - **Coordinating Team**
    - Dave Green
      - ERIAL Project Director
    - Dr. Andrew Asher
      - Lead Research Anthropologist
    - Susan Miller
      - Resident Anthropologist

  - **Other**
    - Dr. Nancy Foster
      - University of Rochester, Project Consultant
ERIAL: background and structure

- ERIAL organizational structure
ERIAL: background and structure

- **ERIAL organizational structure**

  **Face-to-Face**
  Up to 20 meetings per month (research teams)

  **Face-to-Face + Phone Combination**
  Up to 4 meetings per month (coordinating team)

  **Phone Conference**
  Up to 4 meetings per month (anthropologists)
ERIAL: background and structure

- ERIAL research question
ERIAL: background and structure

- ERIAL research question

Diagram:

- Students
- Librarians
- Teaching Faculty

Academic Impressions    Seattle 2013    Dave Green    3/25/2013
ERIAL methods

- 9 Data Collection Methods
- 719 Research Contacts (over 600 unique participants)

- 280 Semi-structured Ethnographic Interviews
  - 49 Librarians
  - 75 Faculty Members
  - 156 Students

- 60 Research Process Interviews
## ERIAL methods

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ERIAL methods

- Observational
  - Participant observation
  - Research process interviews
- Retrospective
  - Interviews
- Elicitation
  - Mapping
  - Photography
- Visual
  - Library maps
  - Design focus groups
Investigating user needs: ERIAL

ERIAL methods: mapping diary (elicitation)
Investigating user needs: ERIAL

- ERIAL methods: cognitive maps (visual)
ERIAL methods: semi-structured ethnographic interviews (retrospective)

- Research Assignments
- Relationships with librarians/professors
- Demonstration of search practices
Investigating user needs: ERIAL

- ERIAL methods: research process interviews (observational)
- Example of first-year student
  - Attempted to locate video as a source for a research assignment
  - Student has already had two library instruction sessions
Research process interview: example and exercise

- 10 minute small group work with report (co-viewing worksheet)

Co-Viewing Worksheet

In this exercise, we will be watching a video of a research process interview with a student. We will stop the video at three points to discuss what we are learning in our small groups. As you watch, please use this worksheet to record your observations.

1. Stopping Point 1

What is the student doing well?

__________________________________________________________________________________________________________________________________________

What are some obstacles the student is facing?

__________________________________________________________________________________________________________________________________________

What else is interesting, strange or unusual about what is happening?

__________________________________________________________________________________________________________________________________________

How would you help this student?

__________________________________________________________________________________________________________________________________________
Research process interview: example and exercise

- Step 1: Identifies item in the catalog
  - Misinterprets call Number as “Video Room 315.”
  - “RM” shelving is located on the fourth floor.
  - Not sure about where to go, the student goes to the reference desk for help.
Step 2: At the reference desk

- The student staffing the reference desk is not there, leaving no one to help.
- The student consults a bookmark giving call number locations, decides that the item is on the fourth floor based on where “V” call numbers are shelved.

“I’m guessing--it starts with VID so that’s on the fourth floor.”
Step 3: At the circ desk

- Decides to ask at the circulation desk.
- Is given incorrect information: “Videos are on the third floor.”
- Videos are shelved in the stacks by call number.
Step 4: At the media center

- The student goes to the third floor, but is confused because she can't find "Room 315."
- Asks for help at the media center, but the student tells her that she should ask at circulation.

"The circulation desk downstairs deals with where things are. We’re mainly to check out equipment. . .things like laptops. I’m sorry."
Step 5: The floor plan

- The student consults the third floor signage, but can't find the call number on the map because it shows only one floor.

“This is not helping me...”
Step 6: At the circ desk again
- The student returns to circulation desk, and is finally given correct information
- Finds video in the stacks
- Total time to find item:

10 minutes
Power of the users’ experience

- Very powerful and persuasive: hard to ignore
- Changed mindset of (some) observers
- Precipitated organizational changes
- Invigorated the relationship with teaching faculty
- Strong supportive response from the university community
- The process itself builds strategic relationships
Power of the users’ experience

- Students
- University Administration
- Teaching Faculty
- Library staff
Impact on the observer (library staff)

“I came to understand that if we are less judgmental about our students’ desire to dig into their research the way we think they should, and understand what it is they are coping with, we could be much more effective service providers.”

Fifi Logan, Head of Reference Services, University of Illinois at Chicago
Impact on the observer (library staff)

“The biggest value is that the reflection on practice is lost in the day-to-day, and doing a study like this is showing the librarians the importance of reflecting on their practice. Just the fact that we had a forced engagement and had to sit down and ask ‘what are we doing, what are students doing, what are we doing for the students, and how can we be doing it better’ has inherent value. It honestly made me a much better librarian.”

Dr. Paula Dempsey, Coordinator of Reference Services,
DePaul University
Impact on the observer (library staff)

“The ERIAL Project has had a lasting impact on how I view my work and the collective work of the library. Employing a range of ethnographic methodologies led to a much deeper understanding of our students and their needs, and did so in a way that I could not have envisioned before this project. The ERIAL experience has transformed how I teach in the classroom and work with individual students…”

Lynda Duke, Academic Outreach Librarian, Illinois Wesleyan University
Impact on the teaching faculty

“...Moreover, our findings dramatically changed the conversation with teaching faculty and administrators on why, and how, to incorporate information literacy into the curriculum.”

Lynda Duke, Academic Outreach Librarian, Illinois Wesleyan University
Impact on the teaching faculty

“When we go to the empirical, we are going into their (the teaching faculty) territory and it raises their interest. They are much more interested in hearing what we found empirically, and that is what we are seeing. To the extent that faculty are passionate about teaching, and I know that faculty at DePaul are, they are very interested in what we are finding out about the students and they want to relate to that.”

Dr. Paula Dempsey, Coordinator of Reference Services, DePaul University
Impact on the teaching faculty

When faculty at NEIUU learned the degree that students were struggling with understanding and using information sources, they responded with an overwhelming surge in library instruction requests.
Impact on the teaching faculty

Number of Class Instruction Sessions by NEIU Librarians
Impact on the teaching faculty

- Changes in orientation requirements (NEIU)
- Changes in instruction requirements (NEIU, IWU)
- Changes in the curriculum (NEIU, IWU)
Impact on the university administration
- Support from NEIU Administration
- Funding for a new comprehensive building plan
- Funding for full service coffee shop and lounge
- Funding for commercially produced tutorials
- Funding for evening/weekend late hour staff positions
- Growing view that Library is important campus leader
Ethnographic tools and how to use them

Participatory Design in Academic Libraries
Methods, Findings, and Implementations
With introduction by Nancy Fried Foster
October 2012

So You Want to Do Anthropology in Your Library?
or
A Practical Guide to Ethnographic Research in Academic Libraries

Andrew Asher
ERIAL Lead Research Anthropologist

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A Practical Guide to Ethnographic Research in Academic Libraries
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Ethnographic tools and how to use them
Ethnographic tools and how to use them

Do Your Own Study

Do you want to study your own students, or some other aspect of your library? If so, you may have questions about how to develop your research interests, how to choose research methods, and what sort of time and financial resources you will need in order to complete your project successfully. The ERIAL Project’s Toolkit is designed to help you begin to think about these questions, walking you through these parts of the research process:

- Pre-project planning
- Developing a research question
- Tying your research question to library design
- Choosing research methods
- Developing and refining instruments
- Gathering data
- Analyzing data
- Writing your report and disseminating information

The Toolkit is primarily geared toward assisting those interested in ethnographic methods, but it also provides basic information that can assist those wishing to use other types of research methods.
The sections of the toolkit follow the chronology of a project:

1. Pre-Project Planning – Logistics
2. Pre-Project Planning – Research Design
3. Collecting Data
4. Analyzing Data
5. Generating Action Items & Presenting Conclusions
Ethnographic tools and how to use them

Comments on:

- 1. Pre-Project Planning – Logistics
- 2. Pre-Project Planning – Research Design
- 3. Collecting Data
- 4. Analyzing Data
- 5. Generating Action Items & Presenting Conclusions
Ethnographic tools and how to use them

- Research Question Exercise (10 Minutes)
Ethnographic tools and how to use them

Comments on:

- 1. Pre-Project Planning – Logistics
- 2. Pre-Project Planning – Research Design
- 3. Collecting Data
- 4. Analyzing Data
- 5. Generating Action Items & Presenting Conclusions
Comments on:

1. Pre-Project Planning – Logistics
2. Pre-Project Planning – Research Design
3. Collecting Data
4. Analyzing Data (sample query NEIU data)
5. Generating Action Items & Presenting Conclusions
Ethnographic tools and how to use them

Comments on:

- 1. Pre-Project Planning – Logistics
- 2. Pre-Project Planning – Research Design
- 3. Collecting Data
- 4. Analyzing Data
- 5. Generating Action Items & Presenting Conclusions (sample lists from NEIU and IWU)
Building implications for NEIU

- The new library design should communicate that the library building is the cultural and intellectual anchor for the NEIU campus; and support those functions which make it so.
- The design should inspire but not intimidate students.
- The design communicates relevance to the lives of the students.
- The design accommodates all needs (the only building open on campus during certain times).
- The design is focused on ease of access and developing relationships between users and librarians and supports various kinds of interactions.
- The design allows for students’ mobility.
- The design allows for a complete set of diverse and opposing needs.
- The design communicates function and expectations.
Investigating user needs: methods
ERIAL: background and structure
Investigating user needs: ERIAL as case study
Research process interview: example and exercise
The power of observing the users’ experience
Ethnographic tools and how to use them
Questions?