

1. LIBRARY USERS AND NEED

Who are the current or future library users this project will benefit?

All current and future users of Chapel Hill Public Library (CHPL) will benefit from a comprehensive assessment and improvement of user experiences, both in-house and online. At the heart of our strategic plans is the continual identification of and removal of barriers to access, no matter what form they take. By employing user experience (UX) methods and measures, we will be able to better identify and understand the barriers that our customers encounter - from confusing stacks layout and signage to archaic policies and procedures to outdated website design and content.

Signage, policies, and websites are just three of the many, many touchpoints that affect access at a library. A complete list would include parking lot layout, text on a brochure, database authentication, furniture arrangement, and more. The sum of all touchpoints adds up to a user's overall library experience and determines their degree of satisfaction, level of engagement, and overall sense of the library's value. By holistically identifying, auditing, and improving all touchpoints, CHPL's current users will have more access and therefore be more satisfied, more engaged, and place greater value on the collections, programs, and services they already enjoy.

Although we are one of the busiest public libraries in the state, only about 40% of Chapel Hill residents have a library card. With our current LSTA grant focused on using market segmentation and demographic analysis to create a Community Engagement Plan, we are positioning ourselves to reach out to more segments of the community - some who have not used us in a long time and some that have never used us. When we entice these current non-users to come to the library's physical or virtual home, we want them to be satisfied with what they find there, be instantly engaged with the library, and clearly recognize the value we hold for them. A UX audit and the subsequent improvements it yields will make all of our touchpoints more appealing to those that don't yet use us – and help us more readily turn non-users into library lovers.

Describe how the need for this project was determined and the extent of the current problem(s) for the users.

In 2013, CHPL opened a renovated and expanded facility, the result of a \$16 million investment by the community. Our facility is bigger and more beautiful, with more collections, services, and programs than ever before. As in years past, CHPL remains one of the highest per capita circulating public libraries in the state. So why do we need to assess and improve?

Much of our traditional quantitative data reveals that we are busier than ever – circulation is up, door counts have exploded, and meeting room usage is at capacity. However, the anecdotal and qualitative data we collect reveals that we can do much, much better.

After the initial “ooohs and aaahs” of opening a gorgeous new building in the midst of a beautiful park setting, we started gathering a wider variety of comments from our users and tracking them in a more systematic manner. That's when we noticed people frequently mentioning that they had trouble finding things in the stacks. And on our website. And that they were bothered by the fact that a quiet study area is right next to the Teen Room. And that the signage is hard to see and really doesn't help get them anywhere. And that the tables in the study rooms are placed too far from the power outlets. In the year and a half spent in our new building, the comments from both new and long-standing users have revealed that CHPL needs to become as useful and useable as it is beautiful.

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Based on user comments, we know that our physical space can be made much more user-friendly. Based on the quantitative data we've begun analyzing from our website, it is clear that our virtual space needs improvement as well. We've only just begun to use web analytics to understand how people are – and aren't – using our website.

Those numbers reveal that we have well over 1,000 distinct pages on our website. Over the past three months, 998 distinct pages were viewed on our website with a unique pageview count of 142,568. Of those many pageviews, 40% of the pages had only one unique view. We could easily interpret this data to mean that we have spread our information out too thinly and many of our information-rich pages are under accessed. Over this three-month period, 82% of sessions on our website began on the homepage, with an exit rate of 56%. This data means that most of our users start on the home page and most of them leave without going to another page. We could interpret this to mean that the information is spread out too much when most users would rather find everything they need on one page.

Furthermore, our website does not have responsive design (a limitation the CMS) and therefore does not translate to customer's mobile devices. Consequently, the separate mobile site we have to maintain does not include all of our pages. This means mobile users do not even have access to some of our web-based resources. Staff express disappointment in other ways with the website's CMS. It is a good option for webmasters, but not for content contributors. On the basis of features like performance, SEO, usability, functionality, plugins, themes, and add-ons, other CMS options are considered better and more reliable.

We have very little data regarding the numerous online resources we subscribe to beyond monthly vendor-provided use statistics. These costly subscription resources may be of great value to our users, but disparate usage statistics counted in non-standardized ways do not indicate usefulness, accessibility, or value. We need a better way to measure whether or not our customers are finding the resources we provide, and whether or not those resources meet their needs. We do know that when staff personally introduce many online resources to customers, they respond with surprise and statements like, "I never knew this was available from the library!"

We recently deployed BiblioCommons as a discovery platform for our catalog and it is overwhelmingly popular with our users, in great part because it was designed with their experience in mind. It is a modern, clean, interactive, and intuitive portal to our collections that is easy to navigate and use. The comments have been overwhelmingly positive and statistics show that not only has this upgrade increased the number of people accessing our collection, it has increased the usage of items in our collections.

- Comparing Jan and Feb 2014 (pre BiblioCommons) with Jan and Feb 2015 (post BiblioCommons), we see an increase of 1,051 checkouts, 4,821 renewals, and 4,241 holds per month.
- In a year-long model (which extrapolates from the first 57 days of 2015), we predict an increase of 16,631 checkouts, 33,805 renewals, 48,618 holds in 2015 over 2014.

In the few months we've had Bibliocommons, users are beginning to ask why our website isn't as easy to use as our catalog.

But back to the question of need. Why do we need to do a UX audit and make these improvements? In large part, because we've never done it before. For decades, checking out lots of books and answering lots of questions was what libraries did. Our stuff and our expertise defined our value – we didn't need to think about our users too much. However, in the age of ebooks and Google, there are lots of avenues to get stuff and many outlets for getting questions answered. Does that mean that

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libraries don't have value anymore? Of course not! It means that we need to shift our focus outward and focus on how we can best serve users, regardless of whether they want a print book, an ebook, a database article, or just a place to come and work.

In order to remain relevant and become ever more responsive, libraries must continually assess, improve, and evolve. In the past at CHPL, as is true of many libraries, that assessment and improvement was too often based on assumptions and inferences by library staff. For the future, CHPL - and libraries everywhere - must assess and improve based on data and desired outcomes as well as evolving user needs and interests. And CHPL, like many libraries, does not have a track record of data-driven decision making or user-focused planning. Projects like this allow us to build that foundation and set us up to more effectively and intelligently allocate resources to serve users now and in the future.

In sum, we allocate a great deal of money to providing the "free" items on our shelves and resources on our website, yet we do not spend enough time considering those that actually use them and improving their experience with and access to all that we offer. Getting in tune with and attuned to the UX perspective - and making subsequent improvements - will help increase access to these resources and make them more visible, valued, and valuable to all users.

2. INTENDED OUTCOMES

INFORMATION ACCESS

When this project is complete, access to both physical and digital resources will be improved and usage will increase. Because things will be easier to find and use both in our stacks and on our website, more current and future users will find and use them.

Outcome: CHPL will have a new, mobile-ready website that incorporates best UX design practices and principles.

Outcome: CHPL will have a new furniture and stacks layout that will increase satisfaction with physical environment of library and improve experiences for all different types of users.

Outcome: CHPL will have a new and improved signage and wayfinding program that will allow users to more easily find what they want in a more appealing and intuitive visual environment.

INSTITUTIONAL CAPACITY

When this project is complete, CHPL will have increased its capacity to achieve key strategic goals (see Section 8). CHPL staff will have gained new, important skills that will equip them to better make decisions and create new services based on user needs and perspectives. Our capacity for providing outstanding experiences both in house and online will increase.

Outcome: CHPL staff will have a UX research skill set that will contribute to their development as well as the continual improvement of user experiences in the future.

Outcome: CHPL staff will increase capacity. With improved wayfinding, signage, and stacks layout, staff will spend less time answering directional questions, freeing up more time for more valuable, engaging work.

3. PROJECT DESCRIPTION

What do you want to do to solve or address the problem stated above?

In order to improve access to our collections, services, and online resources, CHPL will work with a UX expert to complete a top-to-bottom UX audit of our physical and virtual collections and spaces. CHPL will then work with the UX expert to make improvements in-house and online based on that audit. CHPL staff will receive training on UX approach and UX research skills so that continual assessment and improvement can be made well after the grant-funded project ends.

What is UX exactly? What started as a concept in the world of web design has expanded into many areas of both for-profit and non-profit businesses, from the automotive industry to humanitarian NGOs. Googling the term renders many hundreds of definitions, but here's one [from the Nielsen Norman Group](#), a leader in the UX field, that is straightforward and simple:

“User experience encompasses all aspects of the end-user’s interaction with the company, its services, and its products.”

And here's one [from a UX expert](#) that should resonate with public libraries:

“User Experience is a commitment to developing products and services with purpose, compassion, and integrity. It is the never-ending process of seeing the world from the customers’ perspective and working to improve the quality of their lives.”

Indeed, libraries across the country are realizing the benefits of incorporating UX principles into the design of their buildings, websites, services, and organizations. The benefit of thinking like your users means happier, more engaged, more satisfied users. Those types of users in turn signify a library that is responsive, relevant, and ready for the future, regardless of what future users might need or want.

The popularity of the UX approach in the library world can be measured by the number of articles, books, conferences, and resources about it. In just the past year:

- The Southeast Florida Library Information Network (SEFLIN) [hosted a day-long virtual conference on the topic.](#)
- A new [open access, peer-reviewed journal](#) dedicated to library UX professionals has published its first two issues.
- The Gates Foundation funded the development of [“Design Thinking for Libraries: A Toolkit for Patron Centered Design.”](#)
- Library Journal hosted a WebCast series, [LIBRARY UX: Transforming Libraries, Engaging Communities](#)

One of the thought leaders in the library UX arena is Aaron Schmidt, founder and principal at [Influx Library User Experience](#), [Library Journal columnist](#), and co-author with Amanda Etches of [Useful, Useable, Desirable: Applying User Experience Design to Your Library](#). Our project would engage Schmidt to assist with the following:

- Comprehensive UX audit of our physical and virtual environments
- Implementation of improvements based on that audit
- Staff training in basic UX concepts, research, and skills

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For details about each of these, please see “Project Activities” for more information.

How will library staff be trained and prepared? Library staff will participate in the audit, giving them a chance to see the library from our users’ point of view. Library staff will also be trained in basic UX skills and research, increasing their capacity for continually improving library experiences and increasing access for all.

How will the target audience be made aware of the project? While there will be some user surveys, focus groups, and user interviews during the audit and assessment period, the target audience for this project will become aware of the project through the improvements and outcomes of the project. They will notice and enjoy the fruits of the labor - better signage, more intuitive stacks arrangement, a new website, etc. – and not the labor itself.

What will happen to the project after the funding period has ended? Because of the nature of the improvements and the staff training involved, the project will continue well after the funding. In years to come, users will enjoy increased access and satisfaction because of the project. Because of staff engagement and training, UX will become foundational to the CHPL approach and to future staff orientations. Staff will be well equipped to use UX methods and measures to make continual improvements, no matter who those users are and what they need.

After the project ends, CHPL would be happy to share what we learned with other libraries - through NCLA conference sessions, NCPLDA presentations, etc. We plan to document the project along the way, photographing library spaces before and after, capturing survey comments and focus groups sessions, etc. - all of which would make great content for a presentation. With grant funds, we plan to purchase several copies of Schmidt’s book, *Useful, Usable, Desirable* for our staff to read and afterward could make those available for libraries throughout the state – think of this as a traveling book club kit for library leadership teams interested in UX. Also, part of our proposal includes funding for bringing Schmidt to Chapel Hill for four visits. We would be happy to host a UX workshop for NC libraries while he’s here, something akin to the upcoming Toby Greenwalt sessions. We could leverage our project – which will already bring Schmidt here – to extend the learning beyond CHPL to libraries statewide.

4. PROJECT PARTNERS

N/A

5. PLANNING PROCESS

We were awarded a 2013/14 Planning Grant that is focused on data-driven community engagement. We are currently working with Civic Technologies and their Community Connect service to use our ILS data, Census data, and proprietary market segmentation data together to better understand our community of both users and non-users. The result of that project will be a Community Engagement Plan that will be a road map for us to better understand our current users and begin to reach out to segments of our community that may not have previously been engaged with the library.

The ultimate goal of the Community Engagement Plan is to welcome new users into the library – mainly, the 60% of Chapel Hill residents that don’t currently have cards. As we entice new users to engage with the library, we want them to find our services simple, consistent, and easy to use. We don’t want users to have difficulty navigating our stacks or finding resources on our website or bumping up against user-unfriendly policies & procedures. The project outlined here will dovetail perfectly with the current Planning Grant as well as with our short and long term strategic goals.

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The planning for this proposal began with a few key senior staff reading Schmidt and Etches' book, passing it along to others, and discussing it. Chapter 5 – on Customer Service Philosophy – was photocopied and distributed to the in-house team tasked with developing such a philosophy for CHPL. Many staff members attended a SEFLIN webinar where Schmidt talked about the principles of UX and what they can mean for libraries. When they are published, Schmidt's articles from Library Journal are quickly shared amongst staff.

Slowly but surely, a cadre of UX supporters is forming at CHPL, inspired by Schmidt's work. However, we do not have a UX subject matter expert on staff, and those that are excited about it are at capacity with their regular functions as Youth Librarians and Catalogers and Reference Librarians. We could slowly continue to build interest, create capacity, plan and deploy an audit, and then finally make improvements. Or we could leverage current staff interest, our current implementation of organizational restructuring, and our strategic goals with this LSTA opportunity and bring one of the UX experts of the library world to kickstart this work and help us improve sooner rather than later.

While Schmidt was our immediate first choice when we started framing this proposal, we did consider other UX experts, including [all of the speakers that were a part of the SEFLIN webinar](#). While each of them has expert knowledge, many are focused on one particular aspect of UX – web design, building design, UX research. Schmidt and his partners at Influx are the most well-rounded and well-suited for this project. Their book is evidence of their practical approach, their broad expertise, and their understanding of public libraries specifically. We are confident that they are the best choice for this project.

6. PROJECT ACTIVITIES

As outlined above, the project consists of three main parts:

- Comprehensive UX audit of our physical and virtual environments
- Implementation of improvements based on that audit
- Staff training in basic UX concepts, research, and skills

We've worked with Schmidt and his Influx Group to detail just how these will be accomplished:

UX Audit

Influx will conduct a systematic assessment and scoring of the library's UX using the framework in the book *Useful, Usable, Desirable*. This will encompass all aspects of the library's operations, including but not limited to the physical building, customer service, programs and services, policies and procedures, and the website. To conduct the audit, Influx will use a variety of methods including onsite visits, staff interviews, user interviews, and surveys. The main deliverable will be a report outlining the library's strengths, and highlighting opportunities for improvement in both physical and virtual experiences.

User Research Jumpstart for Staff

This "jumpstart" will demonstrate the value of user research, increase the library's user research skill set, get a fresh set of eyes on the library, and deliver an action plan that will help CHPL create a better user experience. Activities will include an "Intro to UX" series of workshops for staff, usability testing, user interviews, and journey mapping. After the User Research Jumpstart, CHPL staff will have a developing user research skill set and better knowledge of the lives of their users and their needs. CHPL staff will also be engaged in and see themselves as an instrumental part of

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improving the user experience at CHPL. The two main deliverables are staff workshops and a collection and analysis of user research data that CHPL will use to guide design decisions.

Virtual Experience Redesign

Based on the information gathered in the Virtual UX Audit, Influx will lead CHPL through a website redesign process consisting of three main phases: Research & Discovery, Design & Development, and Testing & Launch. The R & D phases will be focused on lessons learned from the Audit, the D & D phase will also include staff training on writing for the web and best practices to maintain the website post-launch, and the Testing and Launch phase will engage key CHPL staff in the deployment of the site and the ongoing maintenance. The main deliverable will be a new and improved website that reflects best UX principles and practices.

Physical Experience Redesign

Based on the Physical UX Audit and what we learn during the User Research Jumpstart, CHPL will work with Schmidt to make improvements to the current layout of the building, including overall wayfinding, collection signage, furniture layout, and zones of usage. We will accomplish this by prototyping improvements, collecting usage and survey data, and implementing successful designs. While the specifics depend on our findings, the end result – and main deliverable - will be a refreshed physical environment that deepens engagement with and increases access for our users.

PROJECT TIMELINE

Activity (Explanations below)	Estimated Completion	Completed By
LSTA Grants Announced	June 3, 2015	State Library
Chapel Hill Town Council Approval of Funds	June 30, 2015	Town Council
Schmidt to CH for Audit	August 2015	Schmidt/CHPL
Schmidt to CH for Audit Presentation and Jumpstart	October 2015	Schmidt/CHPL
Virtual Experience Redesign (includes visit to CH)	October 2015-February 2016	Schmidt/CHPL
Physical Experience Redesign (includes visit to CH)	January - April 2016	Schmidt/CHPL

7. EVALUATION

- a. CHPL will track statistics before, during, and after the project. This will be done through a variety of processes, including but not limited to:
- Web analytics software on our website, catalog, and mobile apps
 - ILS reporting for patron and circulation data
 - Data extraction from our meeting and study room reservation software
 - Database logging of customer feedback
 - Community Connect data from current LSTA project

During the project year, CHPL staff will learn new statistic tracking techniques from Influx, based on the to-be-determined targets of our UX improvements. Additionally, understanding the importance of having pre-project implementation data, we are already recording and analyzing data on the virtual experience, patrons, circulation, room usage, community make-up, and customer feedback using our own tools and methods. There are dedicated staff members responsible for tracking this data and we use tools such as Google Analytics, Millennium, Microsoft Excel, CommunityConnect, and embedded reporting tools in our various software.

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b. The hope is that the data will bear out an improvement in information access through an increase in membership and activity at the library by a wider and more diverse swatch of our community. Exactly what form that takes is dependent on the discoveries of the UX audit and redesigns. During and – especially – after project completion, staff will have a better user research skill set and better knowledge of the lives of this community and its needs. This can be illustrated by a more engaged staff that sees the library from the perspective of its users and is empowered to enact change on behalf of these users. CHPL plans to share our experience and knowledge gained from this project with our colleagues in other departments of the Town of Chapel Hill. We have several inter-departmental meetings at various levels that offer presentation opportunities. CHPL also plans to submit presentation applications to the soonest NCLA conference and NCPLDA meeting upon completion of the project. We hope the lessons learned and benefits gained will be productive for the rest of the North Carolina library community.

8. GOALS

As a municipal library, CHPL operates under the broad umbrella of Chapel Hill 2020, the town's comprehensive plan. Our annual business plan is based off of this vision for our community and is divided up into core and strategic goals, including:

Core Business Goals

- Increase access to building spaces and physical resources
- Increase usage of physical collections
- Increase usage of digital collections
- Increase usage of online resources and databases

Strategic Initiatives

Improve customer experiences in library and online.

- Review, rethink, and re-do floor plans in order to provide better user experience.
- Review, rethink, and re-do library website and content.

This project will support these goals as well as our short term goal of removing barriers to access/ increasing discovery of resources and our long-term mission of becoming “a place for everyone, where connections are made, choices are offered, and community is enhanced”

This project will also support Goal #3 of the LSTA Five Year Plan by increasing access to all of our resources, physical and digital, and thereby offering increased support for literacy and learning. Combined with our current year LSTA grant, the outcome will be that more people have more access to more resources to support their needs, interest, and aspirations for life, school, and work.

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9. BUDGET TABLE

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Category	LSTA \$	Matching \$	Total \$
I. Salaries, wages, benefits			
II. Consultant fees	<p>\$5,500 Travel costs for eight onsite days over four trips</p> <p>\$ 85,000 Contract with Aaron Schmidt of Influx Design for:</p> <p>UX Audit \$15,000 UX Jumpstart \$15,000 Physical Redesign \$15,000 Virtual Redesign \$40,000</p>		
III. Travel			
IV. Supplies/materials	<p>\$650 10 copies of <i>Useful, Usable, Desirable</i></p> <p>\$8,850 Design, fabrication, and installation of signage and wayfinding system</p>	\$16,150	
V. Equipment			
VI. Services			
VII. Total	\$100,000	\$16,150	\$116,150

10. BUDGET NARRATIVE

The budget covers the two main phases of this project, first the initial UX audit and staff training, and second, the improvements made based on the audit.

CONSULTANT FEES (\$90,500)

These numbers were provided by Schmidt and reflect his standard fees for this type of work at other libraries. Schmidt, and his Influx Group, is recognized as a leader in UX for libraries. In addition to his book, *Useful, Usable, Desirable*, and his regular *Library Journal* columns, Schmidt has successfully worked with a number of libraries looking to improve the experiences they provide their users, including:

- Seattle Public Library
- District of Columbia Public Library
- Darien Library
- University of Pittsburgh Library
- University of Houston Library

For a full profile of Schmidt and Influx, visit their website – www.weareinflux.com – where you can see the type of work they do and the perspective and expertise they offer.

Schmidt is based in Oregon, so travel will require airline tickets, lodging, and associated expenses. This project will require four visits to CHPL for a total of eight days on site. **(\$5,500)**

To recap the fees and the deliverables associated with each budget line:

- UX Audit will conduct an assessment and produce a report outlining the library's strengths, and highlighting opportunities for improvement in both physical and virtual experiences. **(\$15,000)**
- UX Jumpstart will result in a series of staff workshops and an associated collection and analysis of user research data that CHPL will use to guide design decisions. **(\$15,000)**
- Physical Redesign will result in a new design for library furniture and stacks layout, zones of usage, and recommendations for user-focused signage and wayfinding. **(\$15,000)**
- Virtual Redesign will deliver a new and improved website that reflects best UX principles and practices. This will include research, design, testing, and launch, as well as staff training on writing for the web and maintaining the site in the future. **(\$40,000)**

SUPPLIES & MATERIALS

Ten copies of Schmidt's book, *Useful, Useable, Desirable* will be purchased so that CHPL staff can more deeply understand the UX approach. After the project is complete, CHPL will make this set of books available to libraries throughout the state, as a "UX Book Club Kit." **(\$650)**

Based on user comments and our cursory knowledge of UX practices, we are certain that a redesign of our signage and wayfinding will be recommended in the UX audit. We will employ Schmidt to provide us with recommendations on how to best do this this, incorporating UX design into a wayfinding system that works with our building and works for our users. Based on estimates from similar sized libraries that have done

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signage and wayfinding projects recently, we estimate this at \$25,000. This number includes design, fabrication, and installation. **(\$8,850 LSTA + \$16,150 local = \$25,000)**

Not all of the improvements will have direct costs associated with them. We anticipate that many recommendations from the audit will have only indirect or in kind costs attached, such as moving furniture, relocating service points, etc. This work would be done by Town of Chapel Hill Public Works staff. Improvements such as decluttering service points, rewriting policies, streamlining procedures, or reclassifying collections will be done by CHPL staff.

11. MATCHING FUNDS/LOCAL COMMITMENT

The Friends of the Chapel Hill Public Library will provide the matching funds for this project. Letter of support attached.

12. ABSTRACT

To help us meet our strategic goal of continually identifying and removing barriers to access, CHPL will contract with a leading expert on User Experience (UX) to conduct a top-to-bottom UX audit of its physical and virtual experiences. This will provide us with a greater understanding of what barriers to access our current and future users might encounter and identify areas for improvement. CHPL will then make those improvements to its physical surroundings (such as signage, wayfinding, furniture placement, stacks layout) and its virtual environment (primarily website redesign) as well as train staff in the fundamentals of UX research. The ultimate goal of the project is to increase access for all by creating physical and virtual experiences that are useful, usable, and desirable to those who use us now and those who will access us in the future.