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Embedding UX at the University of York

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UX methodology is becoming more firmly established in the Library sector, moving from novelty to maturity. How do we ensure that our internal processes, systems, and ethos support this? How can we make UX truly part of our daily 'business as usual', rather than being a perpetual project? Every institution is on their own journey and this article will focus on the path that we have taken at the University of York.

Where we came from, where we are now and where we're going

Our journey started back in 2015, when a group of staff from York attended the first User Experience in Libraries Conference in Cambridge. They came back enthused to try out what they had learnt but without a focus of what to do. After a lot of internal discussion about what to do next, we agreed to start slowly and employ a summer intern to start to look at the possibilities UX provided to us. Our intern Emma Grey was key in pulling together information into one central place which became the UX Toolkit (more on which below), and she conducted revealing research with 25 postgraduate (PGR) students on their use of the Library. The results were so insightful that we were immediately convinced of the value of UX; this first project initiated a second for which we again employed an intern. It concentrated on our PGR students and involved 11 participants. Combining the findings from our first project with this second gave us in-depth insight into the workings of PGR students. Through these two projects we were able to make some small changes – notably in the PGR space areas – which were positively received.

At the end of 2015 we reached a pivotal moment where we needed to make a decision about how we would continue to undertake UX work. It was agreed that hereafter instead of employing interns we would move to a model where we

would primarily undertake UX projects with our own staff. This was in part due to the ambitious nature of our next UX project, Understanding Academics, and also because we did not want to lose the knowledge and experience gained from each project.

Our most ambitious UX project, Understanding Academics aimed to truly understand how academics approach their teaching and research and then how our services either help or hinder that. The ultimate aim was to really be able to use the results of this project to ensure the 'academic voice' was embedded in our service development. The project used cognitive maps and semi-structured interviews with nearly 100 academics (142 in total[1]) and has been highly successful with huge impact on our processes and policies – you can read more about it in our article in the New Review of Academic Librarianship (Blake and Gallimore, 2018) and in the UXLibs Yearbook 2017 (Gallimore, 2017). Three key themes which emerged from the project in 2016 formed the basis for our new Library strategy: Space, Scholarship and Skills.

In 2017 the Library began a new 12-month UX project to examine how the Morrell Lounge is used. This is the first area that is seen as users come into the Library so is particularly prominent. Library staff conducted more than 40 behavioural mapping sessions, as well as recording numerous smaller observations as and when they happened; we were subsequently able to build up a detailed picture of how the area was used. It was clear that it was not being used in the way we intended it, or in a way which suited the furniture and layout we had.

Customer Services staff were able to suggest several design changes, and we took a prototyping approach, moving furniture from other parts of the Library to better suit the space, whilst looking for funding to solve the problems long-term. This was hugely successful, with both staff and students giving a lot of positive feedback to the new layout, which as a result is still in place. Our ultimate aim is to implement the new design which we worked on with a furniture supplier but currently we don't have funding to do all of this. We were successful in receiving limited funding which will allow us to install a new Fabrick Acoustic Wall for the 2018/19 academic year.

This project provided an opportunity for Library staff who had never used UX techniques to become involved, particularly staff in Customer Services. It was also our first real experience of design prototyping – finding an interim solution, testing

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1   97 interviews were conducted as part of Understanding Academics but a previous 45 had already been conducted using a more standard methodology which were included in the data analysis.

it out, gaining feedback to make better informed decisions. Ultimately the project has succeeded in ensuring that the Morrell Lounge, which has more than 2,600 visits each day on average (rising to 7,000 at peak times) so is perhaps the single most seen area of the entire University, not only functions better but will now look striking and impressive to students, staff, and visitors alike.

Our next UX project (which was identified by the Understanding Academics project) will be Understanding Faculties. We are just starting to scope this now.

Steering and strategy

It would not have been possible to conduct most of these projects without support from senior managers in the Library. Information Services, a converged service of IT, Library and Archives, has been a CSE (Customer Service Excellence) accredited department since 2014. Since 2015 our UX activities have become key in providing evidence to gain compliance pluses around Customer Insight. We have moved from '*The use of ethnographical research is providing an extra dimension to existing insight and this merits a Compliance Plus.*' (2016 CSE Assessor report) to '*The use of ethnographical research to help develop customer insight has come to fruition with recommendations in a number of projects.*' (2018 CSE Assessor report).

The demonstrable benefits of UX as we've made changes to policies and spaces and received positive feedback from library users, have made it easy for senior managers to understand and value its importance. In order to build on the success of our UX activity we wanted to formalise some elements. Senior managers agreed to:

- Establish a UX group with membership from across the Library
- Commit to one major UX project per year
- Commit to the UX principles of doing things quickly (not waiting till the end of a project before making changes)

A small UX group was created in 2017 to provide expertise in UX and ethnographic techniques. The group were identified due to their roles as being key to ensuring UX becomes central to our approach, as they have influence within their teams and are likely to be leading or heavily involved in projects. The group is sponsored by a member of the senior management team who acts as a conduit between the two. The UX group are responsible for keeping up to date with UX techniques (for example, through a book club: for each group meeting there is a nominated UX

article or chapter which all members read beforehand and discuss at the meeting). Members can be used as a sounding board and to give advice to staff about the use of UX and what techniques may be most appropriate. We recognise that UX is a valuable method to use in projects; however, the premise of UX is to really understand our users. It may not always be the best method and therefore the named individuals above should be able to recognise where UX will and will not be appropriate: other engagement tools can also be used. In addition, all members of Academic Liaison are comfortable using these techniques and available to help in projects requiring the use of UX.

We have made explicit connections between how our UX activities fit into our Library strategy, ensuring that each project is associated with at least one of the strands (Space, Scholarship and Skills). We feel that by committing to one major UX project per year we can continue to embed UX as a core part of our approach. Over the last three years we have completed or are working on:

2016: Understanding Academics

2017: UX Space

2018: Understanding Faculties

Although only one major UX project will be undertaken in any year, other projects and activities are encouraged to utilise UX and ethnographic techniques. For example, any project that involves planning library spaces will involve UX methodologies; our current catalogue improvement project will have at least three 'rounds' of UX as part of the process; and a recent project to understand poor feedback from one department benefited hugely from ethnographic fieldwork and analysis. This use of UX isn't confined to the Library either: the University's recent Inclusive Learning & Assessment policy was informed by ethnographic work that our Academic Liaison Librarians undertook with disabled students. All of this, we hope, will ensure that UX becomes embedded within all our activity and becomes our default where we no longer have the need to refer to UX specifically.

Our UX and ethnographic techniques enable us, as a Library, to demonstrate that we are a research-based organisation. Continuing to invest time and resource in using these methods gives us evidence on which to base our decisions. UX has started to become embedded in our working practices, research methodologies and overall customer service ethos.

Training and support

Training and support are essential in ensuring that UX isn't the sole purview of one or two enthusiastic individuals. At York we offer this support both face-to-face and online: it is important to empower people to truly understand not just the techniques of UX but the *ethos* and approach, and to know how and when to apply it. This is what makes UX spread and start to happen all over the institution independently.

Anyone at York with an interest has access to our UX Toolkit – a set of resources online, designed to *equip* people to undertake UX work in a very practical way.[2] It contains templates for things like cognitive maps, and consent forms for all of the different ethnographic fieldwork we've undertaken. It includes examples of completed maps, interviews, love-letters, as well as written reflections from people who've done the work on what works and what doesn't. It includes reports from conferences like UXLibs and useful presentations shared with us by peers at other institutions. Finally, the Toolkit also contains a master list of every single UX project we've undertaken, with links to the outputs, so that anyone new to the area can get a practical idea of what we've actually *achieved* with the UX approach.

A toolkit such as this doesn't need to be flash or built in expensive software. At the time of writing ours exists as set of a folders and documents on Google Drive, although it will have evolved into something with a more useful and accessible front-end by the time you read this – the key thing is that it is readily accessible, not just for those undertaking UX but any other interested parties. We'd really recommend creating something similar to this: it's extremely useful to have a central place which links off to all the relevant materials, projects, examples and outputs, not just for people new to UX but those of us involved with it year-round.

In terms of face-to-face training, this is given by staff experienced with UX techniques to every member of Library staff doing ethnographic fieldwork for the first time. Training happens mostly in group workshops, but in some cases – for example, behavioural mapping for the first time – we've done brief one-on-one sessions with each and every member of staff undertaking the work. Those who will likely use UX techniques regularly, for example in the Academic Liaison Team, have had related training on topics like asking open questions.

We've also taken our training out to the rest of the University, and this is an area

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2   The toolkit works alongside an overview, reproduced on Ned's website, which is designed to introduce anyone new to UX to the key concepts: <ned-potter.com/ux-in-libraries-resource-list/>.

that can potentially be really exciting for libraries, inspiring changes in the wider working culture. We've offered a general introduction to anyone interested, which was attended by Departmental Administrators, staff from sections such as Planning, Accommodation, Timetabling, and Careers, and will be repeated soon. One service has already brought in Library staff to offer specialised training for their own staff over more than one session, as they start to use UX approaches for themselves. The training here has included not just ethnography but design techniques too. Over time we hope to empower several Departments across the University to gain better understanding of their user groups through UX.

Dissemination of findings

We've tried to take a proactive approach to disseminating our findings, to both specialist and non-specialist audiences. Our Lib-Innovation Blog (<libinnovation.blogspot.com>) was created primarily as a tool to discuss UX work, and is aimed at the Library industry in general: we've put up a range of useful links including summaries of projects and presentations that we've delivered. We've spoken at various Library UX conferences, including of course UXLibs, and to User Experience experts in the Human Computer Interaction research cluster at York, as well as going outside HE entirely to talk to The Good Things Foundation, a charitable organisation focusing on digital inclusion.

We've put all of our presentations onto Slideshare and this has proved particularly fruitful in spreading our work beyond our normal networks. A presentation given in a room in Wales to around 70 people has now been seen over 880,000 times online on Slideshare (Potter, 2017) and we've had colleagues from Europe visit the University to talk to us about UX, specifically as a result of seeing the presentation online.

A crucial audience for dissemination is of course the internal one. We write interim and final reports which are distributed to relevant staff across the entire University, and we try wherever possible to give these to participants in the ethnographic studies themselves before they're circulated more widely.

Top tips for embedding UX at your own institution

We thought we'd end with five tips for embedding UX. We're not trying to suggest we're the experts here, or that we've perfected our strategy. But we have gone a long

way to make UX part of the culture at York, and here are some of the things we consider to have been most important in achieving that:

1. **You need buy-in from the top.** Of course you do, this is news to no one. The key is to link UX to the existing aims and strategy of your organisation and management. People are much less likely to buy in to something in UX silo than they are to buy in to something which helps them achieve what is already on their agenda. Persistence is important too. Many institutions have found it's a lot easier to get permission to diagnose problems through ethnography than permission to try and solve them through actual design changes; but don't be discouraged, keep suggesting ways to improve things, and celebrate successful changes widely – and publicly. Which brings us neatly to…

2. **Go beyond the walls of your own institution.** The more you shout about your UX work to the wider world, the more it is appreciated inside your own institution. In a strange way, external validation can influence how valid something is considered internally, and if your work is out there and talked about this can help enormously.

3. **Repeat after me: UX is not cool.** The sooner UX is no longer framed as this hip new thing, the better. UX is a suite of useful tools that enable us to better know our users and improve our services for them. Nothing about that is *faddish*. UX is not trendy; UX is essential to improving library services.

4. **Time is SO important for UX.** It is important to be realistic about just how much time UX takes. We've found the 4:1 ratio – the idea that for every hour of fieldwork you'll spend four hours analysing and making recommendations – to be remarkably accurate. It's a messy business, ethnography, and only worth it because of how incredibly productive it can be. Investing time in staff so that everyone feels like they can truly understand and utilise these techniques is important. Time to keep up to date through networking at events, attending presentations, and reading the literature. Time for each project. Time to analyse results. Time to act on the data.

5. **You get more impact from quality than you do from quantity.** Embedding UX at an institution is not about trying to crowbar it into every facet of working life, in fact the opposite is true. Focus the way you use your resources and aim for true impact on the users of your service.

UX truly takes root not because you do it all the time, but because when you *do* it you make a genuine impact, you truly learn, and things change as a result.

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