

Making Service Decisions Based on Evidence

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BACKGROUND

Usability testing and a user survey were conducted to better understand user perceptions and to aid decision-making about Interlibrary Loan (ILL) and Document Delivery (DD) cost and user experience.

Why? The problem

- Strong, differing opinions about service interface and user experience
- Decisions made on anecdotal evidence from users, i.e., non-users and reasons missing from the picture

What? The solution

An IRB-approved study to gather evidence using multiple methods:

- Usability Study (reported here)
- Survey (reported here)
- Financial Analysis
- Institutional Inquiry
- Technical Analysis

When?

- October 2010 – August 2011

Who?

- Cross-functional task force from administration, interlibrary loan, public services, and information technology
- Chaired by a senior manager

METHODS

Usability Study

10 usability test sessions were conducted with participants recruited from the UNC Health Affairs schools. Participants were asked to think aloud while completing a series of (known item) search tasks. Post-task and post-test interviews and questionnaires were administered to measure user satisfaction and perceptions.

Survey

An IRB-approved online survey was administered via Qualtrics for one month using questions from instrument in the literature augmented with service-specific questions. 70 of 87 responses were analyzed for self-reported usage patterns, awareness of service availability and service costs, performance, expectations and service satisfaction.

LESSONS LEARNED

This evidence-based approach really works!

- helped produce consensus and create buy-in
- moved group from anecdotal opinions/perceptions to objective fact
- having effort led by an “outsider” had (mostly) advantages
- multi-modal approach built the big picture
- confirmed strengths as well as identified areas needing improvement
- may learn more than you thought you would

IRB process could be improved and shortened

- would have liked help at the beginning

Communication is key

- solicited feedback from affected staff throughout process
- noticed info gaps (e.g., a page for each subgroup, none for on-campus affiliates)
- identified and addressed areas of confusion and uncertainty
- told users what the service does!

Figure 1: "Choose Your Affiliation" screen before

"Ugh, I remember coming here for the first time. I'm like ok now what do I do? And I had to go to so much hell, let me rephrase that, it wasn't hell, it was just a nuisance. 'Cause I wasn't sure if I was a Health Affairs Affiliate [highlights the text], I just wanted the book and I'm a student here."

Figure 2: "Choose Your Affiliation" after initial changes to streamline page

Figure 3: HSL Interlibrary Loan page before

Figure 4: HSL Interlibrary Loan page after removing fees and adding information for UNC Health Affairs affiliates

Figure 5: HSL Book Request before

Figure 6: HSL Book Request after removing fees and adding instructions, turnaround time, automatic form pre-population, and change default Not Wanted After Date

FINDINGS & RECOMMENDATIONS (SELECTED)

Consider eliminating fees

- Not all users could accurately identify the cost of an ILL request. 2 out of 5 participants incorrectly expected article requests to be free (when it would cost \$5).
- Participants were generally confident that they knew the cost of their request (even when they were wrong).

Service performance is an area of excellence.

- Satisfaction with ILL and DD services is high. 42/45 (93%) of ILL were “satisfied” or “very satisfied”, 26/30 (87%) of DD users “satisfied” or “very satisfied”
- Opening and reading an article was easy. 38/41 (93%) of respondents rated “very easy” or “somewhat easy.” 1/41 rated “somewhat difficult.”
- Turnaround time expectations matched actual performance.

Increase awareness of campus delivery

- More users know about ILL than DD. (93% vs. 77%)

ILL/DD is one way to get a resource not available from the library

- 32% of respondents would purchase a book (18/57 “use methods such as Amazon or a publisher to obtain items instead of the UNC-CH Libraries, Interlibrary Loan or Document Delivery” from a few times a year to daily. The main circumstance in which they do this is if they want to own the item.)

Improve article search and annotate resource lists when possible.

- Locating an article or book from a citation was difficult. 2 participants repeatedly unsuccessfully searched by article title in the catalog and web site search.
- Providing resource name alone was insufficient to some users. Two participants commented that they didn’t have enough information to know which resource to use.

Add direct access to ILL/DD from search results pages.

- “No results found” pages for Electronic Journal, Article and site search don’t contain links to ILL/DD. Links from Catalog and Article Linker are not very prominent.

Remove requirement for user to choose affiliation

- Choose Your Affiliation was confusing and/or annoying to users who just wanted their book/article. 3 participants volunteered comments.

Allow Onyen access to ILL system

- Participants could successfully register, reset password and log in to ILLiad.
- Many users expected to use Onyen to log in. Participants were not specifically asked about Onyens, yet two mentioned this expectation. Two participants knew to log in with a separate ILL account from experience. 9 survey respondents mentioned setting up an account/logging in as a dissatisfaction.

Improve ILL request experience to better match user expectations

- Provide immediate confirmation of request success.
- Prepopulate book and article request forms from the catalog.
- Add estimates for turnaround time. Participants were unsure how long a request would take to be completed – especially the difference between a rush and a regular request as there is a cost distinction.
- Shorten the “Not Wanted By” default date. 5 participants thought that the default date was today and not a year from today. 3 participants changed the month or day (not the year) and commented that they expected to receive the item within weeks or months.

NEXT STEPS

- Repeat usability testing to see if changes were effective (April – May 2012)
- Assess impact of dropping fee on service demand, staffing (ongoing)
- Change to LDAP authentication to allow Onyen login (May 2012)
- Merge patron databases to eliminate need to choose affiliation once registered (May 2012)
- Repeat the user survey to get further feedback (under consideration)