Guiding Special Collections Users through Multiple Discovery Platforms

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For: Boston Public Library

Research Plan, User Study Design & Materials
BSI UX Capstone Project
SI 487
13 January 2023

Executive Summary

The purpose of this research plan is to gain insight into the current state of the Boston Public Library Special Collections online catalog search. By conducting user surveys and usability testing, our team hopes to get feedback from current BPL patrons (familiar users) as well as those from a larger audience (unfamiliar users) in order to better understand and design for user needs. We will be focusing on how to guide users to the best tools for finding Special Collections materials they are interested in and how to eventually get to the system for requesting to view materials they wish to see in person in the Reading Room. This research plan will describe the project's goals while underlining the focus areas of our usability research in order to achieve these benchmarks.

Project Description

The Boston Public Library mission is dedicated to four main areas, including "reading and literacy, spaces and programs, reference and instruction, and special collections and cultural heritage."[1] In order to uphold these principles, the Special Collections department wishes to improve their digital catalog search and guide patrons to their desired research materials. During the Covid-19 pandemic, the library took initiative to make more of their materials available digitally and thus began the long process of adding a variety of items to their digital catalogs. With this came updates and increased usage of the online search system and a need to make Special Collections more accessible to patrons, which was one of the platforms that was digitized.

BPL currently uses several discovery systems in order to organize their Special Collections materials digitally. This has caused issues wherein patrons are unable to identify different materials and artifacts that they are looking for. Currently, these platforms cannot be unified into a single one, so the goals is to improve the online navigation experience of the BPL Special Collections website to inform users about what these unique platforms contain and how they work, so it's been the case that individuals, especially those new to the platforms, struggle with using and navigating the systems. In the past, there was not a condensed online space that informed users about what these unique platforms contain and how they work, so it's been the case that individuals, especially those new to the platforms, struggle with using and navigating the systems. Thus, Special Collections' staff have often had to provide guidance, which can be time-consuming. As of now, however, the BPL has attempted to resolve this issue by

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[1] "About the BPL," Boston Public Library, accessed January 11, 2023., https://www.bpl.org/about-the-bpl/.

creating a web page (www.bpl.org/special-collections/search/) that describes and provides links to each of their discovery platforms.

Project Goals

For this project, our primary goal is to provide a way for the BPL stakeholders to more easily access and navigate Special Collections materials offered through the multiple discovery platforms, which has discoverability effects on users as well as having impact on how staff assist users in finding content. This should allow users to spend less time figuring out the search system and more time accessing their desired content.

Another goal is to center our research and design around user needs and complaints. By conducting extensive user research, we hope to highlight the primary concerns of current BPL patrons. We will attempt to measure the success rates of users when finding desired materials and aim to make this process more intuitive.

Our final goal is to improve the experience of Boston Public Library staff wherein they will be able to spend less time directing patrons on how to use the Special Collections search catalog. One of the aims of our project is to ensure that the staff are able to similarly navigate the Special Collections pages easily.

Research Goals

1. Gain insight on what motivates familiar users to use the Special Collections over other resources and positive aspects of the website
2. Better understand how familiar users go about finding and requesting materials
3. Better understand first impressions and assumptions of new users to the Special Collections search
4. Get a user flow that demonstrates how people (new and returning) find and request materials
5. Determine issues and pain points that familiar and new users encounter

Research Questions
- What motivates users to access the BPL Special Collections materials?
- Are users satisfied with the current process for finding and requesting Special Collections items online?

- Do new users find the BPL Special Collections search intuitive? Can they successfully locate and request to access these materials either digitally or in the Reading Room?
- What are the main pain points of using the current Special Collections search?
- Can new users figure out how to ask for help if needed?

Research Plan

The research methods for this project will be an **online survey** and **usability testing**. Surveys will be sent out to familiar users who have been identified as willing to participate in future research by BPL within the next 2 weeks. Usability tests will be conducted by the research team with users unfamiliar with the BPL website using the current Special Collections search (roughly 10 interviews).

Familiar Users

Familiar users are BPL Staff and BPL patrons, specifically authors, artists, and scholars who have successfully identified what they are looking for and made it into the in-person reading room. BPL has a list of people who have successfully made it to the in-person reading room and have emphasized that they are potentially willing to participate in future research.

Purpose

The research questions that we are focusing on are:
- What motivates users to access the BPL Special Collections materials?
- Are users satisfied with the current process for finding and requesting Special Collections items online?
- What are the main pain points of using the current Special Collections search?

Because familiar users have experience navigating the Special Collections page and understand how they work, these questions particularly focus on gaining insights into familiar users' thoughts, issues, and pain points from their past experiences rather than identifying specific usability issues with the Special Collections page.

Methodology

To learn more about familiar users' thoughts, issues, and pain points with using the Special Collections page, we are using online surveying as our research method. Surveying will allow us to get insight regardless of locational constraints and get higher response rates. This will target mainly returning users including BPL patrons who have successfully accessed Special Collections materials as well as BPL staff members. We will be recruiting members from a list of BPL patrons given to us by the Special Collections coordinating team. The questions will ask whether patrons have been satisfied with their experience with the online search catalog, what aspects they like,

what parts they found confusing, and how they have gotten help if needed (see survey link for entire list of questions).

User Research Materials

Survey Design

In order to conduct our surveys, we have prepared a survey design that further details our goals, research objectives and the layout with specific questions. After revising our surveys we will be creating our surveys via Qualtrics which will give us the functionality to gain and analyze our research findings properly. We will be sending this survey to the list of potential people willing to participate in future research from BPL as well as working with our client to possibly create an "opt-in" link through BPL for people to take the survey and get a higher response rate.

Unfamiliar Users

Unfamiliar users are BPL patrons who don't have previous experience with navigating the department's corresponding website. These individuals include students, scholars, authors, and artists who are interested in using BPL's Special Collections.

Purpose

The research questions that we are focusing on:
- Do new users find the BPL Special Collections search intuitive? Can they successfully locate and request to access these materials either digitally or in the Reading Room?
- What are the main pain points of using the current Special Collections search?
- Can new users figure out how to ask for help if needed?

These users may or may not have previous experience with navigating BPL's Special Collections and/or setting up or attending an in-person Reading Room appointment to view materials. Their unfamiliarity with using the website means that they might not know how to navigate the digital discovery platforms or create a Reading Room appointment online. As such, our team wants to focus on gaining insights on their experience with attempting these actions and any usability issues they face while using the Special Collections webpages.

Methodology

Regarding unfamiliar users, we are planning to conduct usability testing combined with additional follow-up questions that match an interviewing research method. We will be recruiting interviewees through convenience sampling due to time constraints and difficulties with reaching out to those living in Boston remotely. We will be targeting those who have never used Special Collections at BPL or other libraries. They may have varying levels of experience with libraries and research in general. Questions will focus on

qualitative observations and initial impressions of the search catalog (see link to script for specific questions).

User Research Materials

[Usability Test Script](#)
To conduct our usability tests, we have created a script that explains our list of tasks, research objectives and follow-up questions after the tests are complete. We will be conducting our interviews either in-person with close observation of task completion or remotely on Zoom with screen sharing capabilities. As aforementioned, users will be collected through convenience sampling.

Appendix

- [BPL Field Visit](#)
- [Report on Users and Frequently Asked Questions from BPL Clients](#)
- [Heuristic Evaluation](#)
- [Survey Design](#)
- [Usability Test/Interview Design](#)