

# Guiding Special Collections Users through Multiple Discovery Platforms

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For: Boston Public Library

Project Planning Report 3  
BSI UX Capstone Project  
SI 407/487  
11 December 2022

# Background

## Who is the Boston Public Library (BPL)?

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.”<sup>1</sup> BPL’s Special Collections is our main area of focus. The department consists of materials that are “rare, distinctive, and culturally significant,” such as music scores by Mozart and books owned by John Adams.<sup>2</sup> Special Collections is broken down into an in person experience that can only be accessed through requesting content on the digitized platform. Furthermore, Special Collections has content based on three sub-departments: Archives, Arts, and Rare Books & Manuscripts. The current Special Collections discovery platforms include its research catalog, catalog cards, unprocessed and digitized collections, and online and paper finding aids all accessible to patrons of the BPL.

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.

## Project Overview

The issue that arises from BPL having several discovery platforms for Special Collections’ artifacts is the lack of consistency among them. Each one consists of different materials, search functionalities, and more which makes them difficult for people to easily learn and remember how to use. Currently, these platforms cannot be unified into a single one and it would be difficult to change their functionality with how the systems work and the Special Collections department runs. 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 creating a web page ([www.bpl.org/special-collections/search/](http://www.bpl.org/special-collections/search/)) that describes and provides links to each of their discovery platforms.


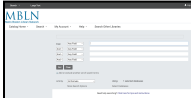
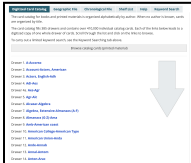
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<sup>1</sup> “About the BPL,” Boston Public Library, accessed October 9, 2022, <https://www.bpl.org/about-the-bpl/>.



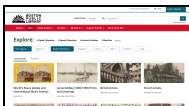
<sup>2</sup> Boston Public Library, “About the BPL.”

Many of the discovery platforms allow users to search for as well as view information, such as authors and descriptions, on certain Special Collections' items.

**Current Discovery Platforms/Tools:**

Platform	What is the platform/tool?	What are the pain points (for patrons and/or staff)?	Who are the users?
<p><a href="#">Bibliocommons</a></p> 	<p>It's the general online library catalog that allows for users to do more simple searches for books and manuscripts.</p>	<ul style="list-style-type: none"> <li>• Not all available items are recorded and come up in search (about 90% of manuscripts and 30% of printed materials are in the system)</li> <li>• Limited search capability (exact title, author, date)</li> <li>• Default view of an item only shows a partial description of it</li> <li>• Not all keyword search results are displayed (must "broaden search")</li> </ul>	<p>All library patrons and staff might use this.</p>
<p><a href="#">Research Catalog</a></p> 	<p>It's the best online catalog for searching for rare books and manuscripts. It contains the same material and information as Bibliocommons, but it has advanced search functions which makes it possible to find items based on more detailed or specific information. In comparison to Bibliocommons, it is also easier to view search results and full descriptions on artifacts.</p>	<ul style="list-style-type: none"> <li>• Not all available items are recorded and come up in search (about 90% of manuscripts and 30% of rare books are in the system)</li> <li>• Does not allow users to search for materials by publication date</li> <li>• Searched materials cannot be seen on this platform, but links are provided to viewable ones in Internet Archive</li> </ul>	<p>All library patrons and staff might use this, but would be specifically helpful for scholars, students, authors, and artists that need to conduct more advanced searching for Special Collections items.</p>
<p>Digitized card catalogs (<a href="#">Rare Books</a> and <a href="#">Manuscripts</a>)</p> 	<p>They are two separate card catalogs for browsing for and navigating to scanned physical index cards containing information about either printed materials (books) or manuscripts within Internet Archive. They are both organized alphabetically by author or title, but are each accompanied by a "Geographic</p>	<ul style="list-style-type: none"> <li>• More difficult to navigate than online catalogs (but there are help guides)</li> <li>• Limited keyword search capability (must occur through Internet Archive that contains links to all digitized cards and search is not as intuitive or reliable with OCR'd documents)</li> </ul>	<p>All library patrons and staff might use these, but due to the complexity of use and the traditional format of the cards, it is more likely for</p>

	File” catalog (organized alphabetically by location) and a “Chronological File” catalog (organized by date, from oldest to newest).	<ul style="list-style-type: none"> <li>Recently obtained items are not included</li> </ul>	individuals experienced with card catalogs or those conducting advanced searches to use these.
<a href="#">ArchivesSpace public user interface</a> 	It is an interface for searching for and viewing digitized archival finding aids (which are similar to catalog records). ArchivesSpace itself is a collections management software. Also, a majority of the collections described are from Rare Books & Manuscripts.	<ul style="list-style-type: none"> <li>Many collections of finding aids are not fully completed</li> <li>A lot of work to manage by staff (ex. grouping, having to transcribe many descriptions from old-fashioned card catalogs)</li> <li>Some collections have so much depth that it might be difficult to navigate to the ones that contain desired items, especially due to how collections are given a single title</li> <li>Some collections are embedded into other collections so they can become hidden or difficult to find</li> </ul>	All library patrons and staff might use this, but would be specifically helpful for scholars, students, authors, and artists that need to conduct more advanced searching for Special Collections items.
<a href="#">Internet Archive</a> 	It is a database for searching for and viewing scanned selections of digitized collections. Most materials are from Rare Books & Manuscripts.	<ul style="list-style-type: none"> <li>Not as easy to search in as the Research Catalog due to how large and somewhat confusing it is (according to staff)</li> </ul>	All library patrons and staff might use this, but would be specifically helpful for scholars, students, authors, and artists that need to conduct more advanced searching for Special Collections items.
<a href="#">Digital Commonwealth</a>	It is another database for searching and browsing	<ul style="list-style-type: none"> <li>Often full collections are not included in</li> </ul>	All library patrons and

	<p>selections of digitized collections. High-quality images of archival materials can be viewed and downloaded.</p>	<p>comparison to Internet Archive</p> <ul style="list-style-type: none"> <li>• Difficult to navigate</li> </ul>	<p>staff might use this, but would be specifically helpful for scholars, students, authors, and artists that need to conduct more advanced searching for Special Collections items.</p>
<p><a href="#">Collections A-Z</a></p> 	<p>It is a website that lists overviews of many archival collections. As of now, it might be the only online description of the collections.</p>	<ul style="list-style-type: none"> <li>• Not fully comprehensive as it is only a partial list of all collections</li> <li>• Somewhat inaccurate as some of the collections listed are not actually archival collections</li> </ul>	<p>All library patrons and staff might use this.</p>
<p><a href="#">Special Collections Blog Posts</a></p> 	<p>It is a web page for viewing and reading about highlighted Special Collections' materials. Both blog posts made by staff members about artifacts as well as links to viewable archival collections are provided.</p>	<ul style="list-style-type: none"> <li>• Only certain items or collections are highlighted</li> </ul>	<p>All library patrons and staff might use this.</p>

Considering the above information, for this project, our team will be providing feedback and proposing design ideas for how to better help inform and direct individuals on using BPL's various digital catalogs and search platforms. We will be focusing on how to guide users to the best tools for finding the items 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. As Special Collections constitute one of the BPL's core mission focuses to make items available to the public, this project will strongly aid the Library's goals. Relevant stakeholders of this project include those Library patrons and staff discussed in the next section as well as individuals who support the BPL.

## Stakeholders

BPL Special Collections stakeholders can be broken into two main groups: BPL Patrons and Staff Members. These groups of stakeholders are representative of two separate perspectives and experiences in regards to the Special Collections. For BPL Patrons, they

engage with the Special Collections platform to discover artifacts for educational, inspirational, research, or other purposes. On the other hand, BPL Staff are committed to taking care of Special Collections items as well as assisting in helping patrons find and look for artifacts that they seek.

## **BPL Patrons**

Based on our conversations with BPL, we were able to narrow down this broader user group of patrons into four specific groups (it is important to note that BPL patrons are not limited to these four groups): students, scholars, authors, and artists. These patrons share a common motivation and curiosity for learning therefore using BPL's Special Collections to acquire unique information for various purposes.

Students and scholars are considered to be a large stakeholder group as they utilize BPL's Special Collections as a research resource for their education and to further explore their interests in the arts and history. Students and scholars are primary stakeholders because they are typically less familiar with Special Collections and don't know where to start. This can provide new insights into the discoverability of artifacts and content as well as the ease of use.

Authors and artists are also considered a large patron stakeholder group. As part of the research community, these stakeholders have typically experience navigating special collection platforms and seek out specific information and content. Therefore, authors and artists are utilizing the Special Collections system to its fullest, often finding content and requesting to further analyze it in the in-person Special Collections Reading Room. With this understanding, these stakeholders play a key role in understanding how users successfully find and request materials.

## **BPL Staff Members**

Regarding BPL staff, we will be specifically working with Special Collections Public Services Librarian, Kathleen Monahan, and Lead Archivist, Eve Neiger. The staff can be narrowed down to curators, archivists, and library assistants. Based on our conversations with some staff members, they are considered to be more secondary stakeholders. While they often engage with the Special Collections platform, the nature of their work is focused on curating the artifacts and content available to BPL patrons as well as assisting BPL patrons in discovering the content they are looking for.



## **Problem Statement**

Patrons of the Boston Public Library must navigate through multiple platforms and databases in order to search for and find Special Collections' items. The Library's shift to a digitized system has left many library users such as experienced and new card holders as well as librarians unaware of the new process of finding and requesting to view materials. Furthermore, there is a lack of consistency in the functionality and materials provided on the multiple discovery platforms. This has made it hard to find the items or collections users wish to see and has led them to spend too much time trying to navigate through the segmented search system. Therefore, patrons and staff of the Boston Public Library need a way to more easily navigate the Special Collections' materials offered through the multiple discovery platforms to access both remotely and with in-person requests.

## **Project Objectives**

### **Primary and Secondary Objectives**

Our Primary Objective 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. Our secondary objective is to assist with organizing the "Search Strategies by Department" wherein each guide for looking at specific materials are detailed. Some metrics to measure success for our primary objectives would be to decrease the average time users take to navigate to their desired information. To better understand the effectiveness of the multiple discovery platforms, we will attempt to measure how often users successfully access information they are looking for on the current Library search system. This would only count if *all* desired information is realized. Although it is not a quantitative metric for success, a likert scale could indicate a successful navigation experience.

### **Constraints and Assumptions**

The important overarching constraint is that we must design within the bounds of current library systems/processes (hosted on third party platforms). Mostly this means we cannot modify the classification methods put in place to organize archives, arts, and rare books/manuscripts data. BPL is currently committed to utilizing these platforms - platforms that have constraints and standards of their own. These constraints may manifest in platform programs, databases, etc. and they ultimately affect how information is structured and displayed.

In a meeting with Meia Geddes, one of the Web Developers for Special Collections, we can assume that there are no development constraints aside from adhering to the BPL's current branding. Another assumption is that we will not be expected to produce any information. All content and categories will be provided for us to work with because these are based on the way the Library currently divides their materials and processes. For the scope of this project, we will not be changing any of the Library's current systems (as they are still trying to revamp them long-term), but rather assisting in making them more easily attainable to both users and librarians.

## **Anticipated Impact & Benefits**

This project will assist with increasing usability for those wishing to access BPL's Special Collections materials. Since the digitization of various department materials is new, there are still many unknowns for users wishing to access these items digitally or by requesting them and physically going to the Reading Room. The goal of this project is to make a more unified way that is easy for patrons to find their desired materials and request them.

Due to the currently fragmented nature of the Special Collections database search platforms, this project will assist library patrons (both returning and new) with navigation of these materials through the creation of a new search system that makes the current search and catalog guides easier to understand and utilize. Although the search system is primarily used by library card holders, the improvements to the current navigation system should also allow librarians to spend less time answering individual questions and finding specific materials for patrons due to existing confusion about the request system.

The most directly impacted stakeholders of this project include those previously mentioned in the stakeholder section such as librarians and employees of the BPL, returning library card holders who have used the system, and new library card holders unfamiliar with the online search. This project will allow Special Collections materials to be more readily available to patrons.

## **Project Resources and Needs Overview**

In this section, we will be outlining the resources and skills needed in order to conduct the research for this project in order to satisfy the needs of stakeholders.

Our team will be using source code from preexisting documentation and libguides provided by the Boston Public Library as well as any preexisting data and user responses received from prior surveys with Library patrons. Our main skills will be learning how to



navigate the existing Special Collections’ platforms and designing and conducting user interviews and tests in order to improve these preexisting systems. We will be using design tools such as Figma in order to prototype and deliver our design as detailed below.

## Relevant Resources

Resource	Need	Gaining Access	Process to Meet Needs	Timeline	Team Members
Current BPL Special Collections discovery platforms and information	Understanding the current measures used for directing patrons to Library materials will help us understand how we can direct users to different ones based on their needs.	The client has sent us links for the websites and platforms. They have provided us with overviews on them.	We will have to research and learn more about the different platforms in order to understand what each of them provides users.	We will be learning more about the BPL website and platforms during the initial stages of project research as well as for the entire duration of the project, September through April.	All team members
Patron Response Surveys	Using questions and suggestions already gathered by the Library, we can provide a basis for pre-existing feedback BPL has received from patrons.	The client has to send us surveys and form responses from the past months.	We will add this feedback to provide a basis for current pain points identified by BPL patrons. This will be used to guide our survey creation and user interviews for our design.	We will request any existing forms in the early research period spanning from January and February to be used in our research plan formulation.	All Team Members
Qualtrics	Qualtrics is a surveying platform that we have access to. We can conduct surveys using various methods that will be helpful in gaining quantitative data.	Each member has personal accounts and access to Qualtrics.	We will need to understand how BPL users search/browse for content. Through methods such as card sorting, mapping, hot spot tracking, we can make content more accessible and easy to discover.	During January and February, we will conduct surveys alongside user interviews and tests getting a comprehensive look at how users feel and use the platform.	Jason Moy
Figma	Figma is a platform that all are familiar with and allows us to collaborate. We can use Figma to ideate and design at different fidelities to create working	Each member has personal accounts and access to collaborating on Figma.	Based on our research and evaluating the needs of our design, Figma is where we can ideate and bring our vision to life.	From January to April, we plan on using Figma, as needed, for the entire duration of the project to visualize our designs.	All team members

	prototypes.				
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## Engaging Stakeholders

### Recruitment

The process of recruitment is a crucial step that we will be conducting in January and February. Recruitment will be broken down into two parts – narrowing in on our stakeholder groups and determining how we will recruit participants. Followed by recruitment, then we will conduct our research.

### Process for Recruiting Participants

In determining how to recruit participants, our clients have stated that geographic location is less important; rather the participants' level of knowledge about special collections as well as how representative they are of our specific sub-stakeholder groups (students, scholars, authors, artists, and staff members) is more important. Therefore, we will recruit based on individuals that we have access to at the University of Michigan as well as from a list of patrons in Boston, provided by our BPL clients, with people who have successfully found items in Special Collections. This provides a solid mix of participants that are both unfamiliar and familiar with the Special Collections platform.

To further ensure that we are able to recruit participants, BPL has set aside about \$200 to \$300 that could be used to compensate or incentivize individuals to participate in our user research.

### Research

As mentioned in the stakeholders section, our stakeholders are representative of BPL patron user groups that are both unfamiliar and familiar with special collections. This mix of familiarity in regards to participants for our research is essential because it provides insights on how to not only improve the existing platform but also gain new perspective on how to generally make information and content more discoverable. Additionally, we hope to gain a better understanding of the Special Collection platform from the perspective of BPL staff stakeholders in the sense of how they help patrons navigate through the platform.

In order to gain these insights, we will use various qualitative and quantitative methods such as heuristic evaluation, comparative analysis, user interview and tests, and surveying. Through these methods, it will give us a better idea of people's thoughts and feelings to discover information as well as specific aspects of the platform that we can improve.

Discussion of the specific research methods and skills are further elaborated on in the [Relevant Skills](#) section.

## **Research Contingency Plan**

In the unlikely event that we are unable to gain access to Boston Public Library resources for collecting user data, we will continue to focus and reach out to our personal contacts and individuals at the University of Michigan to collect more general data about their library website usage. Considering these participants are not BPL users or patrons, we would plan to make this useful because they are still unfamiliar with Special Collections generally and can provide further insight through feelings, usability, and prioritization of features. Similarly, we can reach out to the University of Michigan Library Special Collections department for further advice on website design, organization, and even potential contacts within the scope of our stakeholders should BPL run into any difficulties with communicating with us.

## **Relevant Skills**

### **Navigating Library Special Collections/Discovery Platforms**

Our entire team will need to understand how to use and traverse through BPL's various discovery platforms, which include webpages and libguides, that contain Special Collections' materials. As mentioned on BPL's website, some of these platforms include Bibliocommons, BPL's research catalog, Internet Archive, Digital Commonwealth, and more. We will need to know how to use these platforms to find unique Special Collections' artifacts so that we can better determine how to guide users to the platforms that are relevant to their research. Furthermore, our team will need to understand these platforms in depth in order to figure out how to best direct users in scheduling a Reading Room appointment through them to view specific Special Collections' items. As such, this knowledge will be critical for creating our design solution. Our team will be learning how to navigate the Library's Special Collections and discovery platforms through initial overviews given to us by our clients (in September) as well as through continuous, independent research conducted by the team throughout the entire duration of our project (until April).

### **User Research Methods**

We will be using current BPL patron survey results and UX research skills including using tools like qualtrics, designing and conducting user interviews and usability tests, and creating personas. User interviews will help us understand BPL patrons and staff's feelings and pain points toward the platform. User testing will highlight how patrons use

the website in its current form to successfully complete tasks. Surveying will demonstrate prioritization of what is on the current platform. These methods will be utilized during the early stages of the project in January and February wherein we will aim to gather as much information about current BPL patron needs and pain points using the Special Collections search platform. This is necessary to ensure that all stakeholder concerns are met and that we create as accessible a product as possible. User research will take up a significant portion of our project plan and involve all team members as we create surveys to gather responses and potentially conduct one-on-one interviews with compensation for participants. Thanks to our prior experience during coursework and internships, we all have background on designing and conducting various user research methods but assistance from BPL in regard to their priorities, key areas to redesign, and gathering participants will be necessary.

Currently, we have access to about 15-20 potential participants who have allowed us to contact them for future research. These participants will be contacted and compensated as mentioned in the [Recruitment](#) section of this plan. After recruiting participants, our process will include assigning a timeline to the research collection period in our project plan followed by launching surveys and user testing as soon as possible. We will use the data collected in the latter part of the project timeline for our digital prototype.

For more qualitative data we will utilize user interviews and tests to develop a better understanding of BPL patrons experience with discovering content and requesting materials through the digital database. We will extend this offer to willing participants from the BPL community and, if needed, reach out to students at the University of Michigan for more general information about their opinions on the current state of the Special Collections search platform.

### **Qualtrics**

For quantitative data, we will use surveying through Qualtrics, a software for creating and conducting user surveys accessible through Michigan. This tool allows us to perform different surveying methods such as card sorting, conjoint analysis, heat mapping, preference testing and more which will be valuable in gathering specific user information for the design of the Special Collections website and make content more accessible. Through methods such as card sorting, mapping, and hot spot tracking, we can make content more accessible and easy to discover by seeing what aspects of the current system users do or don't find easy to use.

## **Figma**

Figma is an online design software that allows users to create everything from wireframe models to low and high fidelity prototypes. This tool is essential to creating a design for the end deliverable and allows for collaboration between all our team members. We all have previous experience with using this platform and creating functional prototypes in courses as well as internships. We will not need any funding to access this product as it is a free, online tool. Figma will be used after our user research is conducted, into March and April, since we will be including findings from existing patron responses, Qualtrics, and user interviews to inform our designs. This information will be used for the search platform design and the entire team will play a role in this process. We will be producing multiple iterations of this design to be presented and reviewed by Special Collections staff to ensure it satisfies all needs and includes all necessary information.

## **BPL Style Guide**

We will utilize existing BPL style guidelines in our high fidelity and finalized designs. These style guidelines have already been provided to us by Kathleen, Eve, and Meia who have experience working with the BPL website.

## **Design Contingency Plan**

During the design stages of our project, we will need to frequently communicate with BPL in order to ensure that we are on schedule and delivering the product to a fidelity that they desire. If we run into any issues with delivering a high-fidelity prototype that satisfies desired style guidelines and usability, our team will do our best to communicate with Kathleen and Eve in due time and reach out with any concerns.

## **Wider Context**

### **Comparative Analysis**

The Boston Public Library has several direct competitors in the form of other libraries in the Boston and east coast region of the United States. Some such examples include the Boston Athenaeum, The Cambridge Public Library, and the John F. Kennedy Presidential Museum & Library. The first example, the [Boston Athenaeum](#), allows visitors with a relevant government issued ID to access their special collections and features a similar process to BPL wherein items must be requested ahead of time online before the in-person visit with a relevant librarian can be made. This process seems the most relevant to how we can think about the organization and placement of Special Collections on the Boston Public Library platform since the other two libraries either do not seem to have a

Special Collections readily accessible, or do not allow regular patrons to handle them (in particular the museum artifacts can only be viewed in ongoing exhibits).

While these libraries are all found in the Boston area, one could look further into Massachusetts and surrounding areas to find local public libraries. These libraries all provide similar books and other material loans. Not all public libraries contain a Special Collections department as extensive as BPL, however. Additionally, each library contains different rare items so it is likely that potential library patrons may choose a library based on the materials offered. For other libraries that offer Special Collections or viewing of rare materials such as those mentioned earlier in this section, the department is usually linked in the main navigation of the website and offers details about how to plan a visit. Looking at the online platforms of these libraries and the user flow of reserving a Special Collections experience as well as what materials they offer can help inform the best way to organize information on the BPL website. Each one varies in how their departments are separated and how their database information is presented, but this can be useful to understanding how we should alter the catalog positioning, database guides, and other similar information on BPL's current pages.

In terms of indirect competitors, museums, rare book sellers, ebooks, and online stores. These competitors provide similar services in that they allow users to access rare or limited materials, however many of them require paying a price to do so or purchasing the material to own. It is also important to note that some materials may not be available anywhere besides BPL due to them being one-of-a-kind or of historical importance. Depending on the patron and the purpose of their need to access materials such as those found in Special Collections, they may not have the means to purchase the objects nor need them for longer periods of time. However, purchasing the item would allow them unrestricted access to the materials, unlike the limited viewing time at most libraries.

Museums allow visitors to view their desired items, however usually offer limited interactions unlike the reading room at BPL where patrons can typically touch and look through rare materials. Most museums will include at least some images and descriptions from special exhibitions but others are more assiduous. For example the Smithsonian in Washington D.C. has a powerful search engine for special/featured items. It organizes results based on top results, the medium of the item and allows users to filter by open access. For some exhibitions, users can navigate through a virtual floor plan and are exposed to just as much detail as they would be in person. Most museums do not allow access to their materials without supervision or special circumstances and do not have the sheer volume, variety, and permanence of items that libraries do. However we can still look at how their information is shown on their websites and how guides are presented to potential patrons. Museum sites of the same caliber as the Smithsonian can still help us

understand where else those wishing to access rare materials and archives are going to find their desired items and the procedures for finding them.

## **Analogous Research**

Analogous research should allow us to look outside typical library websites and search systems to find ways to solve the current issues on the Special Collections platform. For this, we aim to look at other services that provide access to old or rare materials as well as search systems more generally. One example is websites like [Internet Archive](#) that allow users to search for websites, videos, and more that are no longer active online. This website can provide inspiration for how we should present information about looking for a specific item and what kind of search criteria are easy or difficult for users to discern. Another experience based application we can turn to is [Airbnb](#), or other similar reservation platforms. These allow users to customize their experience and find a suitable home or hotel for their travels - showcasing how we can aim to display information in a clean way. Finally, we could potentially look at hair or nail salon websites and services to understand how people book appointments online. This would assist with making an easy to find way for BPL patrons to reserve items in the Reading Room.

## **Relevancy**

The purpose of understanding direct and indirect competitors to the Boston Public Library as well as looking into similar database searches is to better understand how we can not only design a platform that meets all of our customer needs, but also to understand what makes BPL Special Collections unique and desirable. Unlike other kinds of businesses, the Library typically works together with other libraries and providers in order to satisfy customer needs. BPL will collaborate with other rare materials providers through things like inter-library exchanges wherein items can be borrowed between libraries with no disadvantages for either party. We should still note how other Special Collections and digital items are displayed online and what we can improve on the current BPL platform.

We also aim to use standard design conventions and make the website as pleasing and easy to use as possible. By analyzing other kinds of websites and reservation services, we can better understand how to display catalog information and reading room requests on the BPL website.



# Project Plan

## Breakdown of Project Work

### Project Planning Spreadsheet

Task/Activity/Milestone	Status	Start date	End date	Team Member	Tools/Skills	Dependencies/Comments
Milestone 1: Research Plan	<input type="checkbox"/>		1/13/23			
Activity 1: Research Protocol Development	<input type="checkbox"/>					
-- Conduct heuristic evaluation		1/4/2023	1/13/2023	Dani	- Navigating Library Special Collections/ Discovery Platforms	
-- Conduct comparative/analogue analysis		1/4/2023	1/13/2023	Alex	- Navigating Library Special Collections/ Discovery Platforms	
-- Submit research plan		1/4/2023	1/13/2023	Alex		- Team present user study design to client and revise as needed - Teams start conducting user study - Teams finalize heuristic evaluation - Teams finalize competitive analysis - Teams start preparing milestone report
Activity 2: Study Design	<input type="checkbox"/>					
-- Gather BPL patrons participants list		11/2/22	1/13/2023	Jason		Pull from list of participants that BPL has (Get from Kathleen)
-- Create survey design		1/4/2023	1/13/2023	Jason	- Qualtrics - Current BPL Special Collections discovery platforms/information	Analyze current BPL Special Collections site (methods: preference testing? Heat mapping?)
-- Create interview script		1/4/2023	1/13/2023	Alex	- Navigating Library Special Collections/ Discovery Platforms	
-- Create user testing script		1/4/2023	1/13/2023	Maddie	- User Research Methods	
-- Submit user study design and materials		1/4/2023	1/13/2023	Dani		

For Milestone 1, we are focusing on the Research plan which includes developing a protocol for research and designing our research studies. This is important because it will better prepare us for conducting our research where we hope to gain insights on our stakeholders needs and pain points when using the Special Collections platform.

Milestone 2: UX Research & Requirements Report	<input type="checkbox"/>		2/22/23			
Activity 1: Research	<input type="checkbox"/>					
-- Send out and collect survey data		1/14/2023		Jason	- Qualtrics - User Research Methods	
-- Conduct interviews				All	- User Research Methods	
-- Conduct user testing				All	- User Research Methods	
Activity 2: Research Analysis	<input type="checkbox"/>					
-- Analyze research findings (ex. affinity diagramming)				Dani	- User Research Methods	
-- Create personas and scenarios				Dani, Alex	- User Research Methods	Based on research findings
-- Create user journeys				Alex	- User Research Methods	
-- Develop design requirements				Maddie	- User Research Methods	
Activity 3: Requirements Report	<input type="checkbox"/>					
-- Submit Research Requirements Report			2/7/2023	Jason	- Google Drive	
-- Revise UX Research & Requirements Report			2/22/2023	Dani	- Google Drive	

For Milestone 2, we are focusing on UX Research and the Requirements Report. This is especially important because we will be conducting and analyzing our research that will ultimately inform our design process. Through this we hope to gain specific improvements and points of knowledge to enhance the Special Collection's platform consistency and discoverability of materials.

<b>Milestone 3: UX Design Report &amp; Interactive Prototype</b>	<input type="checkbox"/>		2/16/23		
<b>Activity 1: Brainstorming &amp; Iteration</b>	<input type="checkbox"/>				
-- Define design requirements		2/7/2023	2/16/2023	Dani	-Figma
-- Ideate and brainstorm developing design ideas/iterations (create a user flow)				All	-Miro
<b>Activity 2: Low Fidelity Prototyping</b>	<input type="checkbox"/>				
-- Make a low-fidelity sketch				All	- Paper, pencils, pens
-- Paper prototyping			2/16/2023	All	- Paper, pencils, pens
-- Move low fidelity sketches to Figma				Jason, Maddie, Alex	-Figma
-- Create mid-fidelity wireframe			2/16/2023	Jason, Maddie, Alex	- Figma - BPL Style Guide
<b>Activity 3: High Fidelity Prototyping</b>	<input type="checkbox"/>				
-- Create high-fidelity wireframe			2/16/2023	Jason, Maddie, Alex	- Figma - BPL Style Guide
-- Develop high-fidelity prototype			2/16/2023	Dani, Maddie	- Figma - BPL Style Guide
-- Do interactive prototyping			2/16/2023	Dani, Maddie	- Figma - BPL Style Guide
-- Finalize interactive prototype			2/16/2023	Dani, Maddie	- Figma - BPL Style Guide

For Milestone 3, we are focusing on the design and UX Design report. This is important because we have a relatively quick timeline to take our research and ideate and wireframe at each level of fidelity. We hope to create a design that will enhance the consistency, navigability, and discoverability of materials on the Special Collections page.

<b>Milestone 4: Evaluation Report</b>	<input type="checkbox"/>		3/9/23		
<b>Activity 1: Prototype Evaluation</b>	<input type="checkbox"/>				
-- Study materials and resources				Alex	
-- Conduct iterative user testing				Maddie	- User Research Methods
-- A/B testing study design				Dani	- User Research Methods
-- Conduct A/B testing				Jason, Maddie, Alex	- User Research Methods
-- Debrief team and gather evaluation findings				Jason, Maddie, Alex	- Zoom
<b>Activity 2: Evaluation Report</b>	<input type="checkbox"/>				
-- Finish Milestone Report				All	
-- Milestone Report Presentation				TBD	
-- Submit finalized evaluation report			4/10/23	All	
<b>Milestone 5: UX Specification Report</b>	<input type="checkbox"/>		3/16/23		
<b>Activity 1: Revise Prototype</b>	<input type="checkbox"/>				
-- Discuss refinements based on Evaluation Report				All	
-- Update high-fidelity model				Dani, Maddie	- Figma
-- Quality check and standardization of prototype				Dani, Maddie	- Figma
<b>Activity 2: Presentation Preparation</b>	<input type="checkbox"/>				
-- Present final design prototype to client				All	- Zoom
-- Make poster for UMSI exposition				Jason, Maddie	- Adobe Illustrator
<b>Activity 3: UX Specification</b>	<input type="checkbox"/>				
-- Begin UX specification report				Dani	
-- Finalize and submit UX specification			4/12/2023	All	

For Milestone 4 and 5, we are focusing on the Evaluation and UX Specification Report which is important because we will conduct user usability testing to iterate on our design and revise our prototype. We hope to improve the overall design to better address our stakeholder's needs.

Milestone 6: Final Report & Presentation	<input type="checkbox"/>		4/25/23			
Activity 1: Finalize Deliverables	<input type="checkbox"/>					
-- Finalize prototype/implementation			4/12/2023	Dani, Maddie	- Figma	
-- Finalize recommendations for client			4/7/2023	All		
Activity 2: Presentation	<input type="checkbox"/>					
-- Poster presentation at UMSI exposition			4/7/2023	All		
-- Final class project presentation			4/13/2023	All		
-- Handover meeting with clients		TBD	4/25/2023	All		
Activity 3: Final Report	<input type="checkbox"/>					
-- Create outline for final report		3/16/2023		Alex		- convey project's research findings - design concept and specification - design's validation - implementation recommendations for the client.
-- Finalize and submit final report			4/21/2023			

For Milestone 6, we are focusing on the Final Report and Presentation which is important because it will include all our work and recommendations that we have worked on. We hope to have created and provided a meaningful solution that has lasting impact on BPL as well as demonstrate our expertise in UX Design.

### Team Roles

It is important to note that while a role may be assigned to one or two team members, we will all be contributing to some degree for each role depending on the situation at hand.

### Administrative

Role	Description	Responsibilities	Project Plan	Assignment
Project Manager  (encompasses Client Liaison, Facilitator and Timekeeper roles)	The project manager makes sure that clients, team members and all stakeholders are aligned with the project's goals. They essentially help everyone stay on track with respect to timelines, quality/quantity of deliverables and the product's overall vision. The product manager will be the main point of contact with Kathleen, Eve and Meia.	<ul style="list-style-type: none"> <li>Assign roles/tasks to team members</li> <li>Schedule meetings</li> <li>Create project timelines</li> <li>Give team updates</li> <li>Bridge the gaps between stakeholders and team members</li> </ul>	<ul style="list-style-type: none"> <li>This role will be relevant throughout and assist with leading team meetings and goal setting</li> <li>The manager will help assign roles in the project plan and make sure the team is on schedule according to both class and client due dates</li> </ul>	Alex Maxim, Jason Moy
Note Taker/Records Keeper	The note taker/records keeper's goal is to provide an organized, thorough record of any important information	<ul style="list-style-type: none"> <li>Take notes at team meetings</li> <li>Take notes at client meetings</li> <li>Save and</li> </ul>	<ul style="list-style-type: none"> <li>Key role for any client and team meetings to keep track of important</li> </ul>	Maddie Gaudet

	shared at team or client meetings.	organize important information from class	decisions or questions <ul style="list-style-type: none"> <li>Will help with organization and keeping the team on track</li> </ul>	
Presenter	The presenter will share out at client meetings and offer background at user interviews.	<ul style="list-style-type: none"> <li>Provide team updates at client meetings</li> <li>Read research context at user interviews</li> </ul>	<ul style="list-style-type: none"> <li>Will assist with share outs during class and client meetings</li> <li>Key role in user interviews during the initial UX research stage and A/B testing stage when conducting the interviews</li> </ul>	Jason Moy
Editor/Formatting Lead	The editor/formatting lead's objective is to read through final deliverables and edit any grammar and spelling mistakes as well as format or diction issues.	<ul style="list-style-type: none"> <li>Edit/polish personas</li> <li>Edit/polish affinity map</li> <li>Edit/polish research report</li> <li>Edit/polish ux writing on Figma</li> </ul>	<ul style="list-style-type: none"> <li>Plays a key role in all deliverables. Will have final view over the Research Plan, UX Research &amp; Requirements Report, Milestone Report, and Final Report</li> <li>They will ensure standard formatting and edit for consistency</li> </ul>	Dani Vykydal

## Functional

Role	Description	Responsibilities	Project Plan	Assignment
Research Lead	The research lead's objective is to uncover user pain points on BPL's special collections page (specifically the search & discover feature), organize said data, and develop potential	<ul style="list-style-type: none"> <li>Format current BPL patron survey results</li> <li>design user surveys through Qualtrics</li> <li>conduct user interviews</li> </ul>	<ul style="list-style-type: none"> <li>Will take the lead for the UX research and A/B testing aspects of the project</li> <li>Conduct user interviews and assist with launching qualtrics survey in January/</li> </ul>	Jason Moy

	solutions for increasing site usability.		February	
Research Analysis Lead	The research analysis lead aims to reveal trends in data from current BPL patron survey results, Qualtrics user surveys, and user interviews. They then will pull meaning from these patterns which will inform design decisions.	<ul style="list-style-type: none"> <li>• Creating personas</li> <li>• Affinity mapping</li> <li>• Delivering a research report on next steps</li> </ul>	<ul style="list-style-type: none"> <li>• Work with results from first stage of UX research (analyze research findings and create the personas and user journey map)</li> </ul>	Dani Vykydal, Alex Maxim
Design Lead	The design lead will take the insights from research analysis and use them to design iteratively (through figma) a mock-up for BPL's special collections portion of the site.	<ul style="list-style-type: none"> <li>• Create low fidelity wireframes on Figma</li> <li>• Edit low-fi to design mid fidelity wireframes on Figma</li> <li>• Edit mid-fi to design polished, high fidelity wireframes on Figma</li> <li>• Focus is on UI - no front end programming or prototyping</li> </ul>	<ul style="list-style-type: none"> <li>• Work on UX Design Report &amp; Interactive Prototype stage of the plan</li> <li>• Create low, medium, and high fidelity models of the design while incorporating feedback and research findings</li> <li>• Finalize design after Evaluation stage</li> </ul>	Maddie Gaudet, Jason Moy, Alex Maxim
Prototyping Lead	The prototyping lead will be in charge of refining the designs on Figma through prototyping interactions with animation and transitions.	<ul style="list-style-type: none"> <li>• Choose transitions between screens (how long, what kind, etc.)</li> <li>• Decide on what elements will be fixed while scrolling</li> <li>• Decide on any animated graphics</li> <li>• Animate pop-ups or overlays</li> <li>• Create user</li> </ul>	<ul style="list-style-type: none"> <li>• Will make interactions for the Figma prototype during the UX Design Report &amp; Interactive Prototype stage</li> <li>• Make prototype as functional as possible by A/B testing stage</li> <li>• Finalize design after Evaluation stage</li> </ul>	Maddie Gaudet, Dani Vykydal

		flows		
Library Science Lead	The Library Science Lead is the team member responsible for looking at team deliverables through a library science lens. This member will make sure the work produced makes sense in the context of BPL frameworks and documentation.	<ul style="list-style-type: none"> <li>• Review team deliverables at each stage to</li> <li>• Become familiar with BPL organizational practices</li> <li>• Ask Kathleen and Eve for clarification when necessary</li> </ul>	<ul style="list-style-type: none"> <li>• Assist with UX Research plan based on current library protocol (primarily research survey and interview script)</li> <li>• Conduct heuristic evaluation and comparative analysis</li> </ul>	Alex Maxim