

Comments inserted as footnotes, with concluding remarks at the end (djw)

**ADALIB
PROJECT PLAN**

**For
Dr. Don Winiiecki
IPT 529
Needs Assessment**

**By
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And
Lex Mulder**

March 20, 2008

PROJECT: ADALIB

The Ada Community Library maintains a website that is used by library patrons and staff. Features of the website include library catalog searches, calendar of events, hours of operation, requests for holds, renewals, and more.

Ada Community Library: <http://www.adalib.org/>

The project team leader, Patrick Hawke, is an employee of the Ada Community Library and is working with Erin Hasler, Librarian and Youth Services Manager of the Library. The project team will be reporting directly to Erin Hasler. The team also has access to Dylan Baker, the webmaster of the library website.

Erin thinks there might be some problems with the website and feels that it is “too busy.” She is further concerned that patrons are having a difficult time finding the information they need and many of the website’s features may not be getting used. Erin describes her feelings about the problems as follows: “If only I knew if the website is working or not and whether the users are satisfied or frustrated.”¹

Going into this project, the team was somewhat unsure of what direction the investigation would take. Erin felt that there “was something wrong with the web site” but she wasn’t sure. We initially approached the project with the idea of doing a needs analysis on the website to see how library patrons are using it. Once we started digging, the project team found that the library maintained a database of comments that dated back to October 2006, but the comments have not been analyzed for content. The project team also discovered that the website has had at least one major overhaul since that time.

1 From this, we have something that appears to be a problem (for Erin, at least), but maybe it’s actually more of an opportunity: Erin (speaking for the library) isn’t sure if the organization’s website is working. However, from this, we don’t know what would be the case if the website was `working’. As I think was mentioned sometime in the past, this seems to call for an application of Harless’ 13 smart questions to define what need or opportunity might actually exist. (Of course, that’s kind of what you’re suggesting below!)

Our project will be two-fold:

1. To mine the existing data:²
 - a. Determine the level of customer satisfaction
 - b. Find out areas of frustration and satisfaction (with the site and/or with the library processes – check outs, renewals, fines, holds, etc.)
2. If there is a level of dissatisfaction with the site itself:
 - a. Find out how the visitors to the Library website are really using the site.
 - b. How the website can be improved for patrons and staff.³

The existing web site comments are broken out into the following categories which the customer chooses from a drop-down menu:

- – CHOOSE ITEM –⁴
- Catalog Problem
- Complaint
- Employment

2 Maybe the first thing to find out is what is actually *in* the data archived since 2006. Perhaps the available data won't support accomplishment of these ends...

3 Perhaps even if there isn't any overt dissatisfaction, there are still opportunities for improvement in the way services are offered, data is collected and made reportable so that administrative and managerial decisions can be made. This might turn us back to the library staff and management to find out what they envision as useful and helpful to their interests. Any discovered dissatisfaction might point toward the most urgent things, but given Patrick's knowledge of computer and software usability, and Lex's knowledge of similar things (I apologize, but I'm not sure about Rob's expertise!) the group can probably identify a set of other things that could/would help out, and to implement both interface and back end changes that help all constituents.

4 Yikes! This seems like a very mutt-ish list! Problems and complaints belong to one category, employment to another, messages to the board and/or director to another category, and the rest of the items seem to belong to their own independent categories! This is really messy from a cognitive usability standpoint...

I'm 'jumping to solutions' here, but it seems like we could put the information-delivery items on one menu, complaint items on another menu, and library-use items on another menu... (Or maybe divide the menu into logical segments... I dunno.)

- For Library Board
- For Library Director
- Other
- Programs and Events
- Reference Question
- Renewals
- Request an Item
- Website Feedback

The existing database of comments has been graphed according to these categories and can be viewed in the [pie chart on page 5](#).

The same categories have been placed into a Pareto chart ([page 6](#)), which indicates we need to break down the “Other” category to see what the major issues are. The project team will investigate the following categories to see if there has been some mis-filing with the appropriate category:⁵

- “-CHOOSE ITEM-” is the first item in the drop-down menu and was intended to be a set of instructions and not a category, but it must be investigated.
- Because customer frustration and satisfaction are unknown factors, the “Complaints” item is worthy of our attention. It provides more information as of what area(s) of the website need(s) attention and may give cause to creating a different category that addresses specific complaints.
- Also any other category that is frequently addressed by customers is worthy of investigation.

⁵ Seems like an exploratory process – we have to send Lewis and Clark (or Hawke, Lyons and Mulder) out into the frontier and find out what is out there before we can decide what to do with it...

Type of Analysis

An initial evaluation of the "Contact Us" comments (qualitative data) will determine if we have a problem or not. Since this type of data is collected, for the most part, from one-time needs, there is no practical method for "training" people on how to use the Library website. The site needs to be as intuitive as possible so that patrons understand what to do and/or what can be done. This approach lends itself to a knowledge and skill assessment.⁶

The *Open System* model is more responsive to change and is continuously aware. It also refers to the continuous adaptation and the ripple effects between systems; all of these seem to describe our situation in that our users are not employees that we have direct control over, but outsiders that are using this format to voice their concerns.... which if we use their comments properly, we should be adjusting our "system" to meet their needs.

There is a change from a natural system perspective towards an open system. The open system model focuses on the joint ties that bind the organization to its environment (i.e. patrons). The environment (patron) is perceived to be the source of information, materials and energy, vital to the continuation of the system.

- More response to change within & outside
- Every subsystem takes every other subsystem as its ecology (everything overlaps itself)
- Continuous adaptation (changes with the environment)
- Continuously aware

First those who have entered in some feedback in the Contact Us form and chosen a category where their content may not fit the category (which begs the comparison of what people think versus how it is interpreted.)⁷

6 This does seem to be appropriate for a certain genre of 'problems,' but in a backwards sort of way. As you say below, we don't have the luxury of affecting the users/patrons as individuals, so we might have to interpret the comments found in the archive in a way that allows us to imagine what the users know and can do (or don't know and can't do), and then to redesign the interface accordingly.

7 Yeah. This is the problem of induction – we want to be able to triangulate the data to reduce interpretation errors, but we don't have much ability to get data with which we can triangulate!

Secondly, the more important question of; does their comment directly relate to the performance of the website? Several do, but a majority don't directly address negative problems with the website, but possibly positive use of the website (I.E. they were able to use the website to communicate with the Library directly.) There is no compliment category in the list. Maybe it should be in there to give customers a chance to give a compliment.

Team members and their roles⁸

- Erin Hasler - Librarian and Youth Services Manager of the Library
- Dylan Baker- Web Master for Ada Community Library
- Patrick Hawke – Project Team Leader, Employee of Ada Community Library,
- Lex Mulder – Data analyst and report writer
- Rob Lyons - Analyst of data and writer of reports

A project timeline has been included, see [page 7](#).

Expected deliverables

- Final report (formal report) to Erin Hasler that will include Suggestions for possible interventions, updates, or improvements if necessary
- Graphs/Charts of "Comments" and Suggestion Box data
- Final class presentation (?)⁹
- Final written report to Dr Winiecki

⁸ It would be good to pseudonym everyone and the organization

⁹ This isn't on any explicit list of deliverables, but we'll learn about the project gradually through the debriefs during class times.

PROJECT DATA

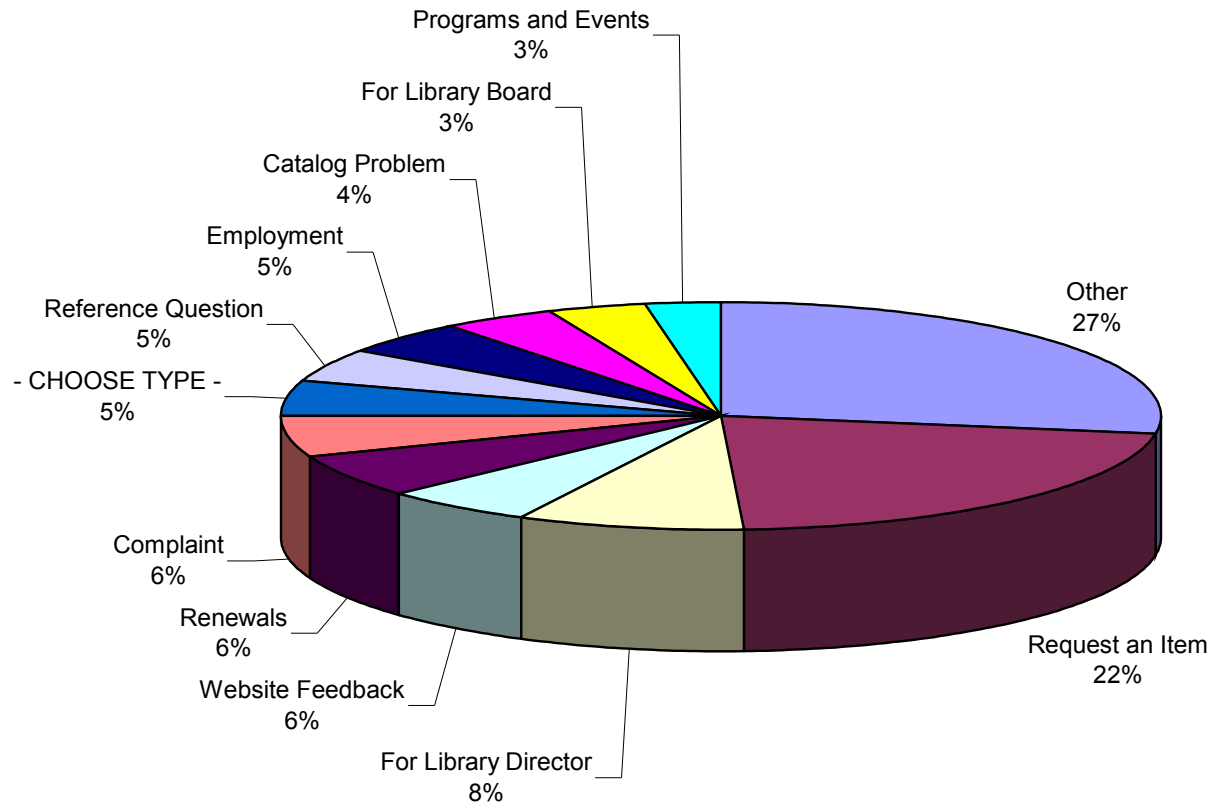
1. Types of data we think are required to define the 'problem': Knowledge and skills of the patrons and employees.
2. To gather relevant data we plan on the following methods: ¹⁰
 - Mining existing Comments from web page
 - Customer surveys (in person at library)¹¹
 - Customer surveys (electronically from web page)
 - The [Morae](#) software interface that tracks visitor's mouse movement and clicks.
3. Data Sources:
 - Web page data base
 - Interviews & Surveys with:
 - Customers
 - Employees
 - Management
 - Webmaster
 - The [Morae](#) software interface to track and monitor web page user actions while visiting the site.

¹⁰In addition to this, I think it would be fruitful to also begin working up ideas for how these different data sources can be use to triangulate whatever you find. Note that I'm not suggesting this could be done totally right now. Rather, I suggest that this is something to be cooked up as you go in your data collection and analysis activities.

I think we've actually already (at least) mentioned this as a possibility after one of the debriefs you've provided in class – that setting up ways to combine these data into useful *information* would in fact set up possibilities for continuous learning about the organization and how it can more proactively identify and respond to patron and employee needs in the future.

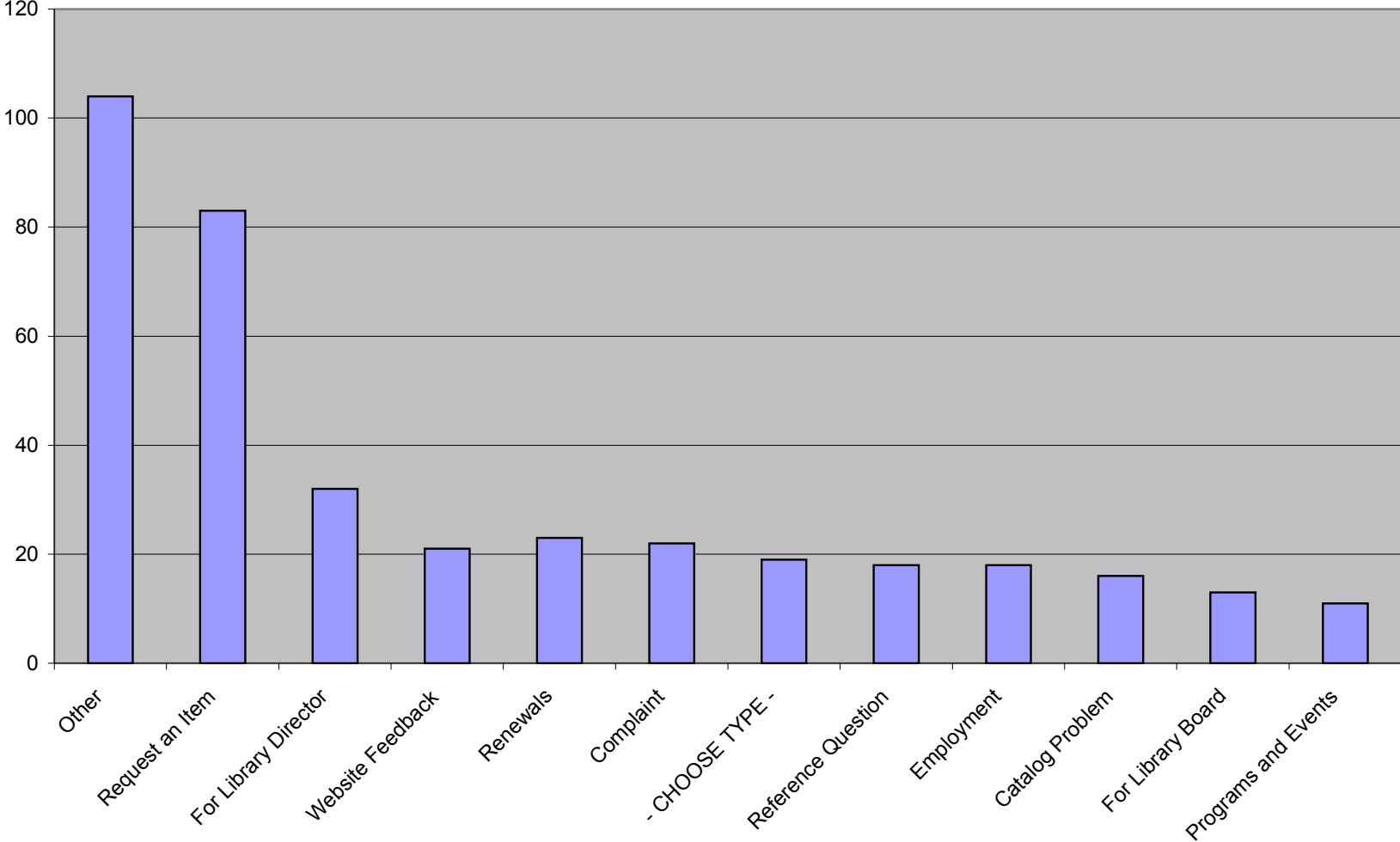
¹¹From this, it's not possible to say how many persons will be included in each method or how we're selecting informants groups. Are we somehow stratifying membership in these groups by some structural category like age, year-in-school, sex, etc? Perhaps we're just asking for volunteers? This is an important question that should be worked out before too much longer!

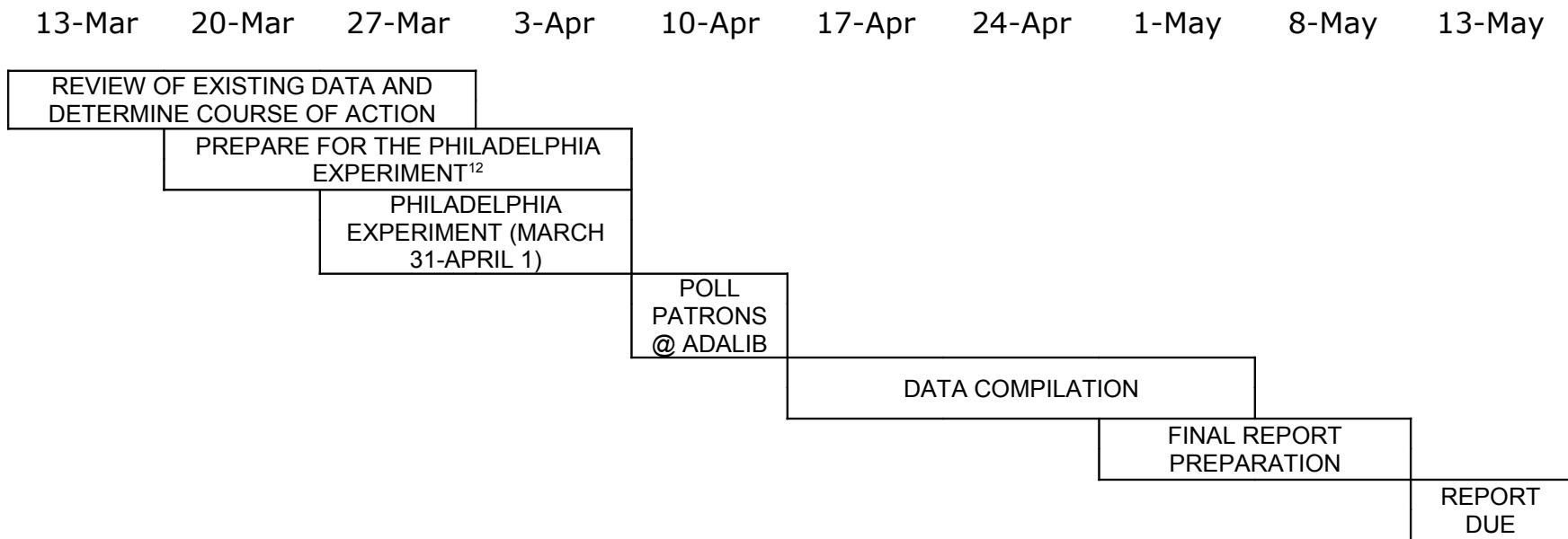
ADALIB Comments



Other	Request an Item	For Library Director	Website Feedback	Renewals	Complaint
- CHOOSE TYPE -	Reference Question	Employment	Catalog Problem	For Library Board	Programs and Events

ADALIB Comments Pareto Chart





¹²The `Philadelphia experiment'? By the schedule this is already begun, but I wonder what it is and what is being gotten from it?

The following are the requirements listed in our class syllabus for this assignment:

Project Plan Document Requirements¹³

Following guidance provided in readings and class discussions, prepare a project proposal and data gathering & analysis plan. This submission should be no longer than about 7 pages and should include:

1. Situation

Describe the situation (problem or opportunity) that you believe calls for a needs assessment or performance analysis. This can be anything from a paragraph to a page in length. Be sure to identify:

1. Client organization
2. Who you'll be reporting to in the organization
3. What makes you think there's a 'problem'? (What evidence, say so, etc. led to the identification of a problem – drop in sales, decrease in customer satisfaction, drop in overall quality, loss in market share, management reports, worker observations, etc.)
4. Team members and their roles (including the needs assessment team and people at the client site who will be part of the project in some way)
5. Timeline (a Gantt chart or something like it that details major phases and time spans for the project)
6. Expected deliverables to be provided to the client
7. What sort of needs assessment process you think is appropriate in this situation (knowledge & skill; job & task; competency-based, or strategic), and why. (This should connect to 1.3 [above] – what makes you think there's a problem.)
8. If you think several different kinds of needs assessment might be appropriate, indicate that, but focus only on one type in this submission.
9. Which of the models reviewed during weeks 1-3 seems to be the best fit for organizing this needs assessment project, and why you believe it is a good fit?

2. Data Gathering

Describe¹⁴

1. Types of data you think are required to define the 'problem.' (Match data types with what the NA model used in 1.9 [above] suggest are important. This may be implicit in the model.)
2. Methods/tools you plan to use to gather relevant data (for example, one or more from: observation, interview, survey, document review, etc. – this should be coordinated with the model noted in 1.9 [above]).

¹³You can use the proforma from Gupta et al. (2007) as they apply, modify those forms to suit your purpose or develop your own format. Incorporate formats, items, etc. from other sources as you deem appropriate. In part, the evaluation of your project plan will follow how you have done things and the appropriateness of your selection of resources from those available. There is no 'ideal' rather there are many possible adequate ways of organizing your documents.

¹⁴Be sure to align the methods you have selected with regard to how they match the project needs and constraints. Provide a principled rationale for the methods in light of the presenting issues/symptoms and type of NA that appears to be appropriate. For example, don't plan to use surveys just because you can use 'SurveyMonkey.'

3. Sources you plan to gather those data from (who provides the data – this should be coordinated with what is indicated in 1.2, 1.9 and 2.1 [above]).

Project Plan Document Peer Evaluation Form

If you haven't already done so, please complete the peer evaluation form for the project planning document. The form is available at the following URL: http://coen.boisestate.edu/dwiniecki/IPT529/Peer_evaluation_plandoc_ip529.htm

The following are concluding comments on the project planning document:

1. From the look of things, the team is getting a better bead on the processes to be undertaken, though what might be definable as a problem in this particular case isn't yet very clear. I don't see this to be a flaw, though I suspect more effort will have to be committed to the definition of problems and opportunities fairly soon. Culling through and classifying the contents of data archived since 2006 might very well add a lot of clarity to the issues!
2. The assignment of 'knowledge and skill assessment' seems rough and ready at this point but I suspect things might begin to move into other forms of needs assessment. For example, if it is determined that the organization wants different kinds of data, or wants to convert data collection into more tactically or strategically useful *information*, we'll want to begin looking at a strategic NA to start planning what is wanted and how it will be used to inform day to day operations as well as administrative and managerial planning and decision-making.
3. I look forward to hearing the team's debriefs in the coming weeks! Things seem pretty wide open still and this could turn out to be much more interesting than any of us envision yet!

Marks: 15.3 / 17 (remaining three points out of 20 will come from peer evaluations)