PERSONAS: AN ASSESSMENT TOOL FOR SPACE AND SERVICE DESIGN

Southeastern Library Assessment Conference
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Who We Are

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What We’ll Cover

- What are user personas?
- What do they do/why are they useful?
- How can they be adapted for library space and service design?
- How do you create them?
- What we did at NCSU and what we learned.
TONYA CREW

“I learn by studying with other engineering students. I really need my group to get my coursework done and study for exams.”

WHAT'S YOUR SCHOOL WORK LIKE?

Problem sets are pretty much my life as an engineering student! The problems are really challenging every week. Actually, this is the hardest semester for me ever. I usually work on the problem sets on my own and then I get together with my assigned group members. We have to turn in the homework together, handwritten on engineering paper. It’s great because I always learn from talking about the problems with my group members. It’s hard for us all to get together because everyone’s so busy with their classes, work, and other activities. Our exams are really tough too. I don’t know how I’d get by without meeting up with classmates to study together for exams.

In my CHE 450 course I have to do a group presentation with two other students. We divvied up the work since it was impossible for us to find many times when we could meet. But we put the presentation together and practiced the whole thing a few times in one of the EB 1 classrooms that was empty. It felt like we shouldn’t be there though.

WHERE DO YOU STUDY?

I’ve got my routine down! My classes are mostly on Centennial Campus. I usually study in between classes in EB 1. I like studying there because it’s close to my classes and my TA's office is there. I can get food and I like that I often run into other biochem-e majors. I like to study near other engineering students because I sometimes run into classmates and also I think they just get what I’m going through.

For my CHE 415 course we meet every Tuesday night at the library to work together on our problem sets because the library’s the most centrally located place to where everyone lives. We usually try to get one of the group study rooms but sometimes that’s not possible. If we can’t get one, we’ll find another spot – like the purple wavy bench. Then we’ll grab a big whiteboard. Or we’ll get a bigger table in EB 1. Either way, we

ABOUT ME

• 21 years old
• Senior, Chemical and Biomolecular Engineering (“CHEM E”)
• Hunt Library will be a great place for routinely meeting with groups for class projects.

MY NEEDS

• A room my group can book on a weekly basis
• Big tables for spreading out my stuff
• A room for practicing presentations, one that feels professional
• A sense that I’m near other chem-e students
• Food and drink

WHAT’S IN MY BAG

• Calculator
• Engineering paper
• Big fat textbook (expensive!)
• Handwritten class notes
• Daily planner
• Laptop (some days)
Personas

- “Ad hoc” or “data-driven”
- Make assumptions and knowledge of users explicit
- Build empathy, get diverse staff on the same page
- Useful for all kinds of design – space, services, website

Adlin – Power of Ad Hoc Personas webinar:
www.uie.com/events/virtual_seminars/ad_hoc_personas
OUR CONTEXT
James B. Hunt, Jr. Library

- The timeline:
  - Planning and construction from 2008-2012
  - Opened January 2, 2013

- The vision: to define the 21st century research library and build the best learning and collaborative space in the country

- The challenge: to deliver services in a completely new learning environment, with spaces and technologies we’ve never supported before
Planning Phase 2009-2012

- No assessment librarian
- User studies: a lot of interest but happening in silos with little cross-communication
- Consultant hired to help create service & staffing models
- Decisions being made/new questions each day
  
  Need for data/feedback
- Spring 2011: interviews of faculty, grads and undergrads in textiles and engineering
Creating Personas

- May 2011: we want personas for space/service design!
- In 3 weeks!
- Needed to:
  - Learn about personas
  - Adapt the process for library services and spaces
  - Conduct workshops
  - Write/construct the personas

... on a very tight timeline
We did it!

- Adapting Adlin (combo between ad hoc and data driven)
- Interview data hadn’t been deeply processed
- 3 workshops
  - Using people who’d conducted the interviews
- Result: 10 personas
  - 4 faculty
  - 2 graduate
  - 4 undergraduate
- Testing proved accurate!
Step One: Identifying assumptions about users

Brainstorm the ways your user group is typically categorized.

Undergrads!

Upper classmen / Lower classmen

First year / Sophomore / Junior / Senior

Different majors - Humanities, Art, Engineering, Science, ...

...
Step Two: Moving from user categories to user goals

> Brainstorm user needs or goals on sticky notes.

It can be helpful to use “I want…” or “I need…” statements.
Step Two: Moving from user categories to user goals

> Brainstorm user needs or goals on sticky notes.

- I need to find & attend a required library event
- I need to practice a presentation
- I need someplace to work between classes
- I need to check out technology
- I need to book a group study room
- I need help getting started with research
- I need access to a computer on campus
- I want a place to spread out my work
- I need a quiet space to get away and work
- I need a place to get food and drink
- I need to charge my technology

It can be helpful to use “I want…” or “I need…” statements.
Step Two: Moving from user categories to user goals

> Start by placing the sticky notes in the categories your team had identified.

**Humanities**
- I need a quiet space to get away and work
- I need help getting started with research
- I need help with technology

**Engineering**
- I need to meet with a regular project group
- I want a place to spread out my work
- I need access to a computer on campus

**Science**
- I need easy access to textbooks
- I need a place to study alongside my friends
- I need late night access to a safe place to get things done

**Social Science**
- I need someplace to work between classes
- I need to practice a presentation
- I need to find a meeting space central to where everyone lives
Step Two: Moving from user categories to user goals

> It will quickly become apparent that the categories don’t neatly account for the goals.
Step Two: Moving from user categories to user goals

> Start to rearrange the sticky notes, clustering similar items together.

I need to find a meeting space central to where everyone lives

I need to book a group study room

I need to practice a presentation

I need to meet with a regular project group

I need a place to study alongside my friends

I need help getting started with research

I need help with technology

I need to find & attend a required library event

I need late night access to a safe place to get things done

I need a quiet space to get away and work

I want a place to spread out my work
Step Two: Moving from user categories to user goals

> Identify themes from the clusters.

- I want a place on campus that feels like mine
- I want a regular place to meet with my friends
- I want a place to play my (or the library’s) video games
- I need to find a meeting space central to where everyone lives
- I need to meet with a regular project group
- I need a place to study alongside my friends
- I need help getting started with research
- I need help with technology
- I need to find & attend a required library event
- I need help getting started with research
- I need someplace to work between classes
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- I need a quiet space to get away and work

**Using library as a social space**

**Maximizing time to get a lot of work done**

**Still getting to know campus & college work**

**Does a lot of work in groups - formal or informal**
Step Two: Moving from user categories to user goals

> Create new user groups based on the themes you've identified.

- **Campus “newbie”**
  - I need a place to get food and drink
  - I want a place on campus that feels like mine
  - I need help getting started with research
  - I need help with technology

- **Maximizing time to get a lot of work done**
  - I need a place to get food and drink
  - I need late night access to a safe place to get things done
  - I need a quiet space to get away and work
  - I need access to scanners & printers that are easy to use, reliable, & quick

Still getting to know campus & college work
Step 3: Creating the personas

I need to find & attend a required library event

I need help with technology

I need to book a group study room

I want a place on campus that feels like mine

I need help getting started with research

I need someplace to work between classes

MY NEEDS

- Attend a workshop with a librarian for my FTM 105 course
- Get research and technical help
- Somewhere to go between classes where I can be near others
- Group study rooms
- Learning the ropes of how things work on campus and in the library

> Turn each group of needs and wants into a persona skeleton.
Step 3: Creating the personas

> Once you’ve got your skeletons, it’s time to start fleshing them out into full personas.

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- Attend a workshop with a librarian for my FTM 105 course
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Creating the personas

> Give your persona a name and a representative quote

CARRIE NEWBY
“I’ve still got a lot to learn about campus and being in college, but I do know the library is the place to be around people. That’s how I like to study, even if I’m working by myself.”

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Creating the personas

Add a short narrative covering key aspects of your persona’s needs and experiences

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WHAT’S YOUR SCHOOL WORK LIKE?
I’m taking ENG 101, COM 110, a biology course, and two FTM courses. For almost every course I have to write papers. I also have to do a group project for COM 110, that’s Public Speaking, and also for one of my FTM courses. My biology class is mostly memorizing information and taking tests and we have a lab every week. I also have midterms and final exams in most of my courses. I have to do a lot of reading for biology and my FTM courses.

WHERE DO YOU STUDY?
Since I’m in the College of Textiles I’m over on Centennial Campus every week. I set up my schedule so I’m there on Tuesday and Thursdays. Otherwise, all my courses are on Main Campus. It ends up being a lot of traveling on the Wolfline!
Between classes on Centennial I usually meet up with my friend and we study and hang out together at the Port City Java in the College of Textiles. My favorite way to study is with my friends. Since we’re taking different courses, we don’t work on the same stuff, but I like being with them. Or if a friend isn’t free, I still like to be at the Port City Java because I like to be near people. When I need to work on a computer, I go up to the Textiles Library and use one of the computers there. I might work on an assignment that needs to be submitted through Moodle. I have a laptop, but I rarely bring it to campus because it’s just too heavy. I learned about that little library from one of my classmates.
Since I’m over on Main Campus a lot, I really like to go to DH Hill Library. I first saw the library on a campus tour before I applied to NCSU. I thought it was so cool! My favorite place is the big area on the first floor with all the computers and green and purple furniture. Sometimes it’s kind of crowded but I can usually get a computer and I like that there are so many people around. There’s more of a chance I can meet someone. Since I’m new to campus, I like to see what all’s going on. I’ve asked the staff in the library for help with a couple of things – like figuring out how to print and also how to get to my biology class room. I’ve also been able to ask students studying there for help if I don’t feel like I’m bothering them – more help about printing and questions about Moodle.
For my group projects we’ve been meeting up at the library to get our work done. I know there are group rooms available there, but they never seem to be free. I wish we could reserve one ahead of time! We usually find somewhere that’ll work though, even if it’s not super private. I’ve checked out a laptop before because I didn’t want to drag mine around all day before our meeting. To practice the presentation I think we’ll try to get one of the rooms in the library.
ABOUT ME
- 18 years old
- Freshman, Fashion & Textiles Management
- Lives in Wolf Village with two roommates
- Hunt Library will be a great place for studying near other people and getting help for my research papers.

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WHAT'S IN MY BAG
- Textbooks
- Notebook
- iPod
- Daily planner
- Vogue Magazine
- Gum
- Cell phone

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> Add a picture

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Personas Represent Spectrum of Needs
WAYS TO USE PERSONAS
Applying Personas

- A way to package needs assessment data
- Team building (project teams, public services)
  - Introduce personas to other stakeholders
  - Using a shared language
  - Testing the personas against real users
- Foster deeper discussions of users
- Use with other design tools
Tools: Use Cases

- Common in software / website design
- Used also in space and service design
- Succinct statements of how users will use spaces and services
<table>
<thead>
<tr>
<th>Who</th>
<th>What</th>
<th>Why</th>
<th>How</th>
<th>Technologies</th>
<th>Services</th>
<th>Space Attributes</th>
<th>Check</th>
</tr>
</thead>
<tbody>
<tr>
<td>X User</td>
<td>Needs to...</td>
<td>Because...</td>
<td>Would be facilitated by...</td>
<td>Technology/Hardware items</td>
<td>Support services</td>
<td>Space Requirements/Recommendations</td>
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<tr>
<td></td>
<td>Aspires to...</td>
<td>In order to...</td>
<td>To be successful, would need...</td>
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<tr>
<td>Sample</td>
<td>Need to create posters and videos for class projects</td>
<td>because the X department is now placing a strong emphasis on improved communication...</td>
<td>To be successful students will need...</td>
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<td>Undergraduates in X</td>
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<td>department</td>
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- **Check:**
  - No such existing space serves needs at all
  - Existing space minimally serves needs: Uris Hall, Entry Foyer space is currently in use for this purpose, but the problem is...
Tools: Journey Map

- Represent how a user experiences a service over a period of time
- Evaluative tool or generative tool
- X-axis = time, Y-axis = “touchpoints”
- Touchpoints can be info, tech, space, staff, furniture, etc.
- Use with personas
<table>
<thead>
<tr>
<th></th>
<th>Pre-Service</th>
<th>Enter 11:30am</th>
<th>Walking, 11:45am</th>
<th>Eating 11:50am</th>
<th>Working 12:00pm</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Activities</strong></td>
<td>Leave class with 3 hours before next class. Need work on Checks what sandwiches are on sale at Hunt Café.</td>
<td>Enter library and head to café. Checks computer availability which shows 3rd floor Learning Commons not too busy.</td>
<td>Travel to 3rd floor Learning Commons</td>
<td>Sit on steps to eat sandwich.</td>
<td>Finds computer, settles in.</td>
</tr>
<tr>
<td><strong>Environment</strong></td>
<td>EB 1</td>
<td>Café area, 1st floor.</td>
<td>Entry, walking past ISP</td>
<td>Steps to LC</td>
<td>LC area near window.</td>
</tr>
</tbody>
</table>
| **Interaction**| Checks phone. Walks down to Hunt.                                         | Gets drink and sandwich from café. Watches ABDIS. | Hands are full, has to get ID out to swipe?  
Greeted by staff member.     | Clean steps look inviting.          | Logs in to campus image. Finds files in dropbox. Edits previous work. |
| **Objects**    | Phone. Bag w/laptop.                                                        | Displays at café show booked rooms and computer availability.  
Food, drink.                  | Carrying bag and food.                | Food, bag, trash can.                   | Desktop computer  
Desk area, chair, |
Best Practices

- Use your data
- Using data is valuable (challenge assumptions)
- Involve data collectors in persona creation
- Separate workshops for fac/grad/ug
- Take time to have staff learn the personas (and create opportunities for this)
IN CLOSING
Resources

- Learning Space Toolkit
  - [learningspacetoolkit.org](learningspacetoolkit.org)

- ARL Learning Space Pre-Programming Tool Kit
  - Crit Stuart (ARL)

- Foster, N., & Gibbons, S. (Eds.). (2007). *Studying Students: The Undergraduate Research Project at the University of Rochester*
Contact

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