

# **NATIONAL LIBRARY AND KNOWLEDGE SERVICES WEBSITE**

## **USER RESEARCH**

Version: 1.0

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# 1. Overview – project goals; scope; team; activities; background

## 1.1. Executive Summary

The drivers behind this project include:

- Some of the Library and Knowledge Services legacy websites are no longer providing the aesthetics or functionality which the HEE library leads require and the LKS community expects. There are two national websites and multiple regional/sub-regional sites. These include:
  1. [www.libraryservices.nhs.uk](http://www.libraryservices.nhs.uk)
  2. [kfh.libraryservices.nhs.uk/](http://kfh.libraryservices.nhs.uk/)
  3. <https://southlks.libguides.com/lks/home>
  4. [www.eel.nhs.uk/](http://www.eel.nhs.uk/)
  5. [www.lihnn.nhs.uk/](http://www.lihnn.nhs.uk/)
  6. [www.kssllibraries.nhs.uk/](http://www.kssllibraries.nhs.uk/)
  7. [www.swimsnetwork.nhs.uk/](http://www.swimsnetwork.nhs.uk/)
  8. <http://www.libraryservices.nhs.uk/wiki/>
  9. <https://commissioning.libraryservices.nhs.uk/>

Some are internally hosted and some externally hosted.

- Our content is dispersed and often duplicated, and these legacy sites were no longer providing the aesthetics or functionality required by ourselves and our stakeholders.
- HEE Library and Knowledge Services (LKS) staff are spending too much time managing platforms and content. The LKS Team is paying for external hosting when it potentially does not need to.
- The audit of Library and Knowledge Services undertaken by CIBER Research recommended a common LKS website.
- It is HEE strategy to minimise the number of websites it maintains and where possible avoid paying for external website hosting.

The project team adopted the User Discovery methodology used by Lagom Strategy (a digital service Discovery phase specialist agency) to undertake a comprehensive UX research project.

## 1.2. Project Goals

The goals of the User Discovery project were:

- A. Better understand the triggers, experience, context, behaviour and needs of prospective service users
  1. Tease out if and how needs range across the user roles
  2. Identify the content they most / really need from a prospective service
  3. Understand the current gap to meeting those needs

- B. Create a backlog, find the gaps and augment with missing user stories
- C. Test and validate the user stories to frame an evidence-driven (re)prioritisation of the backlog

### 1.3. The Scope of the Project

NHS Library services staff are the primary audience, comprising Library Managers, Specialist librarians, and Library Assistants, equating to approximately 1200 staff across 200 NHS library services within NHS Trusts in England.

### 1.4. Project Team

- Richard Bridgen, Knowledge Systems Manager, HEE Library and Knowledge Services and Technology Enhanced Learning Team working across Midlands and East of England
- Helene Gorring, Library & Knowledge Services Development Lead, Health Education England, working across London and Kent, Surrey and Sussex
- Lucy Reid, Deputy Head of Library and Knowledge Services and Technology Enhanced Learning, Health Education England, working across London and Kent, Surrey and Sussex
- Dominic Gilroy Library and Knowledge Services Development Manager, Health Education England working across the North
- Helen Bingham, Head of Knowledge Services and Technology Enhanced Learning, Health Education England working across the South
- Jenny Toller, Knowledge Systems Manager, Health Education England working across the South

### 1.5. Activities

The user research was conducted February to June 2019.

These activities allowed us to generate the findings and insights in this report and other outputs:

1. Conducted **19 one-to-one interviews** with stakeholders, and end users for identified gaps
2. Ran 2 x **user needs face-to-face workshops** with a range of stakeholders and end users in Leeds and London (February 1 and 25) to generate proto-personas and user journey scenarios. Travel costs were offered, if required.  
  
Users were from all regions of the country working in a variety of professional and paraprofessional library and knowledge services' roles
3. Ran 1 x user needs virtual workshop with a range of end users (April 10) to generate proto-personas and user journey scenarios
4. Analysis of **a user needs survey** with 172 responses
5. Analysis of **a pre-UX phase website functionality user needs survey** with 199 responses

6. Created and prioritised **37 user stories** with the HEE team (July)

## 1.6. Key Associated Documents

- Proto-persona profiles
- User journeys
- Stakeholder interview records
- User story backlog

Note: **all** project outputs and documentation are gathered in the project's dedicated [SharePoint folder](#).

## 2. User Research – methodology, key findings, gap analysis, validation

### 2.1. Qualitative Research

- 19 interviews with stakeholders from HEE and the wider Library and Knowledge Services community
- 42 user participants in three user needs workshops
- Reviewed open text comments in an online survey with 172 respondents and in a pre-UX phase online survey of functional website requirements with 199 respondents

### 2.2. Quantitative Research

- 172 respondents to the online user needs survey
- 199 respondents to a pre-UX phase online survey of functional website requirements

### 2.3. Key Findings from the User Research

#### 2.3.1. Users expressed a strong need for a single point of access to LKS documents and resources

*Users found the multiplicity of current LKS sites confusing. They expressed an overwhelming desire to have just one place to go for information.*

“ Official versions of national policies and initiatives, and examples of good practice from local services, need to be in one place.

“ Data on three different sites. See that there's an issue easily. So many different places for information

“ Having something that brings everything together under one login will be fantastic

““ We need one space where we can go to - instead of the separate sites

““ One central access point to all information is key

*Some users were concerned about duplication*

““ One place for documents. Stop duplication. SharePoint enables us to work together.

““ I think that having the one place instead of many places and duplication nationally will make it a success

*There was also a strongly expressed desire to incorporate regional areas into a single national site.*

““ it is also important that regions/sub-regions and their networks can have their own protected spaces within the larger set-up

““ Consideration should be given to incorporating the South LKS site and other similar regional sites into the new national platform.

““ This could well replace a wide range of local wikis, blogs etc. but to do this it needs to be flexible enough to allow local groups to create their own areas, and structure those as necessary.

““ It would be nice to see what other people are working on regional and national, to offer support or ideas e.g. HIW etc. An area that would reduce emails from mailing lists and to collate ideas e.g., ask colleagues solution or Brainstorm etc could be in the COP areas

### **2.3.2. Users expressed a strong need for a site with good search functionality and filtering.**

*Library and Knowledge services staff need to be able to find relevant documents quickly; they don't want to have to spend time sifting through results or having to run complicated searches.*

““ It's difficult to find things.

““ The search user interface needs to use natural language searching and be filterable by topic and date range if possible, please.

““ Clear navigation / search function are key components

““ Search functionality brings results back in a useful way

### **2.3.3. It is important for users to be kept up to date**

*Users want to have confidence that they are accessing the latest content whether it is a guideline, policy document or general information.*

“ It has to be clear that it is up to date/ being updated so that we can use and rely on what we find there.

“ [There must be] proper link checking to remove the dead links/out of date content

“ It needs to be kept up to date to be effective so staffing to ensure this needs to be identified.

### **2.3.4. It is vital for the site to be easy to use, to be written in plain English and to be visually appealing**

*The site must be attractive to use and be laid out in a form which is easy to read and intuitive so that it's as easy to find relevant information. It must not overload users with information or look cluttered.*

“ [The current site:] Lack of interactivity. Look and feel. Can't find things. Where do you go. Feels really, rigid

“ I need quick access to the resources I need, available wherever and whenever I need them (different devices) [...] Access must be easy.”

“ [The site] just needs intuitive functionality

“ [The site must be] easy for a new member of staff to browse and navigate

“ Don't want to get lost in layers of web pages and clicks

“ I want the site to be less text-heavy and more visually appealing

“ Please get the look and feel right. Serif fonts and some bright pastel colours. Not too cluttered - less is more

### **2.3.5. Any site must work within the constraints of the ICT systems and policies in use within local NHS Trusts**

*There is no national approach to ICT within the NHS. ICT policies and systems are set by Trusts individually, and so vary. Any site will need to work within these constraints. We cannot assume that systems and versions will be the same as exist within HEE.*

“ You need to take into account any restrictions that IT Departments may impose on individual Trusts e.g. blocking blogs, social media etc

“ ensure new platform works within software and networking and firewall restrictions of the NHS Trusts

“ Be aware that there are a variety of firewalls and access restrictions in each trust.

“ The only problem I can see with this is that NHS Trusts often have issues surrounding IT and being able to access the site will be difficult.

### **2.3.6. Users who have outreach responsibilities show a strong need for the site to work well with mobile devices**

*The site must work across all devices and browsers. LKS staff must have confidence that the site will work if they are out and about on a ward round, in a meeting or otherwise not at their desk. It should be able to cope with poor wi-fi connectivity.*

“ Important for the site to work well on mobile platforms

“ Touch of a button on phone and it's there. Website easy and simple to use. Mobile friendly.

“ Choice digital device / PC first / Mobile first

“ Very important that it's mobile friendly – I would read this on train journeys, use a phone

### **2.3.7. There is a strong need to be able to easily download and upload documentation from and to the site**

*LKS users need to be able to download documentation and resources and also to upload documentation requested by HEE.*

“ It would also be good to have a workspace for users to contribute, e.g. to be able to download an Excel template and then to upload it. Also perhaps online forms for users to submit information, which the system then automatically collates.

“ Anything that makes it easier to upload documents and create links

*There was also an expressed need to a secure area to enable sensitive information to be uploaded.*

“ Secure area for uploading any 'sensitive' information e.g. resource spending. Ability to embed widgets e.g. videos

### **2.3.8. There is a strong need to have single sign-on for site authentication ideally based on OpenAthens**

*OpenAthens is the authentication system for resources purchased for use by NHS staff. Not having to remember additional usernames and passwords is important.*

“ Authentication administration for LKS services difficult ... especially if a person is in multiple groups. Single place; single sign-on.

“ Stability, security and only one password to access different areas.

“ I'm involved in a few national initiatives - one using Slack, one using Kahootz so having something that brings everything together under one login will be fantastic.

### **2.3.9. Alerting is important to keep users up to date with new and modified content in which they are interested**

*Users prefer to receive alerts to updated content rather than having to go to the site to check whether something is current or not. Users would like to be able to specify their areas of interest and receive only alerts relevant to these areas.*

“ One place to look; set up alerts; push information out. Not looking for all the bells and whistles. Functional.

“ Posts appear first for areas of interest/alerting to new relevant content.

“ I value Knowledge for Healthcare updates – pushed via email.

*And content owners also to receive alerts:*

“ The content owner is alerted shortly before the review date

“ [I want to] personalise [my] own notifications

### **2.3.10. Communities of practice and collaborative tools are important**

*Task and finish groups and LKS users interested in a common area value the ability to easily share documents, expertise and devise common solutions.*

“ Secure storage for documents produced by my working group or submitted by my service

“ [I] need space for shared documents/resources collaboration

“ [An] HIW community of practice would be useful.



“ [I need] hub areas on website (*communities of practice*)

*There is a need for communities to include non-NHS staff:*

“ In terms of mobilising evidence, there are plenty of KM communities out there whom we should be drawing knowledge from; how would it benefit having a community of practice closed to the NHS?

“ Communication between groups within regions or projects is essential for collaboration and a feeling of harmonization across the NHS Libraries community.

### **2.3.11. The site should support career development and induction of those new to the profession**

*Users valued having a place to go to for resources on developing their careers, their job description or information about roles if they are new to the profession on the NHS.*

“ Advocacy for newer roles/outreach.

“ “I want a place to reliably find information when I’m unsure and I want to know how to develop my career.”

“ How library assistants can progress – apprenticeships

“ Help, I am a new starter – see South’s LKS site for demo of how this works – FAQs and induction

### **2.3.12. The site should offer a range of communication tools so that users can find out what's going on. This must include mailing lists.**

*The site needs to retain existing communication methods such as mailing lists and a blog, but also incorporate social media and discussion fora.*

“ Must incorporate social media - links and synthesis

“ Focus the site as a communications tool.

“ communication between groups within regions or projects is essential for collaboration and a feeling of harmonization across the NHS Libraries community.

*And must allow contributions from LKS staff*

“ The blog is an important communication tool but must be curated/made more easily searchable. Allow contributions from LKS staff

**2.3.13. Calendars of events filtered by region must be available. Events could also include booking reservation and administration.**

*Users would appreciate a calendar of events. They would like to filter events by region.*

“ Events filtered by region - hopefully this does not mean that we would only ever see events from the region in which we work? It should be a national events calendar with all the appropriate national awareness weeks/days added and then have the ability to filter by region or date.

“ It definitely needs to have a function where you can see local events, etc. as a lot of the events we attend are still local/in the region

*There was also some value, expressed in the validation survey, placed on the ability to reserve a place on an event there and then.*

**2.3.14. Users expressed some need for the site to incorporate social media**

*Many library and knowledge services use Twitter to broadcast their activities. It would be useful to collate this into a page on the site. There was not any need expressed to set up new social media channels.*

“ [Success would be to have a] Twitter feed on the page – keep it fresh and current

“ The site needs to provide me with the communication tools I need to use to find out what's going on

“ Use Twitter and blogs, Instagram, WhatsApp

**2.3.15. Members of working groups should be able to work virtually across geographies and sectors.**

*This should include the storage of documents and the ability to edit the content of the group's pages on the site*

“ The local mailing lists are suitable for discussions between regional and local groups so these do not need to be recreated but forums for special groups and national threads might be nice

“ We have a private wiki for Shropshire and Staffordshire Health Libraries, containing documentation on our LMS, meeting minutes etc. This might be a good candidate for replacement by a local partition on this site.

“ Should act as a central space for all LKS activity, enabling collaboration and sharing of information.

““ We need one space where we can go to - instead of the separate sites as referred to in the introduction to the survey. But it is also important that regions/sub-regions and their networks can have their own protected spaces within the larger set-up.

““ Collaborative tools becoming more important as travel becomes more problematic

### **2.3.16. The site should allow users to connect to peers, find mentors, coaches, collaborators and others with skills to facilitate learning**

*Being able to connect with colleagues and peers was a strong need of users. They want to be able to share practice, get ideas and find solutions to problems they face.*

““ It would be nice to see what other people are working on regional and national, to offer support or ideas e.g. HIW etc.

““ “I want to learn from peers and share my ideas to improve the services I bring to users” (Librarian in small Acute Trust; user profile)

““ Encourage me to get in touch with colleagues which I don’t tend to do. I’m not sure if they’re in the same group as me.

““ Networking is important; having a national, centralised hub for networking and informal sharing of best practices would be beneficial

““ What key problem would this project solve for your work? Enhanced collaboration. Encourage me to get in touch with colleagues which I don’t tend to do. I’m not sure if they’re in the same group as me.

““ Involving people, highlighting good practice, sharing resources such as publicity materials, discussions in groups.

### **2.3.17. The site must act as a repository**

*Users expressed a strong need to be able to find and share case studies, knowledge and best practice taking place in local library and knowledge services so that users don’t have to start from scratch and horizon scan potential developments*

““ There are discussions elsewhere in my region regarding a repository for teaching and learning materials. Having a repository at this level would make life much easier.

““ Provide repository for materials outside Trusts. Fair and equitable access to these repositories.

“ Access to training opportunities would be amazing. These could be national, regional or local. Training with accreditation but also peer organised training opportunities. Sharing the tacit knowledge of LKS staff seems like something that could be improved through a system such as this.

### **2.3.18. The site should act as an archive so that users can learn from the historical record**

*There was some need expressed for the site to act of an archive so that user can learn from how things were done in the past*

“ The main thing is to help us reduce the amount of documentation we need to keep locally on our shared drive & to act as a permanent, stable, structured repository, so we don't lose our memory!

“ Very simple upload of documents including bulk upload of say archive of LMS minutes.

“ [Site should have an] examples of good practice database/ example document database.

## **2.4. Gap Analysis**

Following the workshops and stakeholder interviews, some gaps in user roles and user journeys were identified. Library and Knowledge services staff were identified and contacted to fill these gaps.

In addition, the user research identified some areas in which there is a notable gap between the expressed needs of current users, and what is possible currently.

They include the needs for:

- Users to connect to peers, find mentors, coaches, collaborators and others with skills to facilitate learning [see 2.3.16]
- Members of working groups should be able to work virtually across geographies and sectors [see 2.3.15]
- A single point of access to LKS documents and resources [see 2.3.1]
- A site with good search functionality and filtering. [see 2.3.2]
- Staff to easily download and upload documentation from and to the site [see 2.3.7]
- Authentication based on OpenAthens [see 2.3.8]
- Alerting to keep users up to date with new and modified content in which they are interested [see 2.3.9]
- Communities of practice to connect with peers and colleagues [see 2.3.10]
- Calendars of events filtered by region with options for registering for events [see 2.3.13]

## 2.5. Validating the User Needs

User representatives were invited to validate a list of 28 user needs identified from the stakeholder interviews, user needs workshops and an earlier survey on website functionality.

172 users completed the user needs validation survey, of which:

- 68 were Library Managers
- 25 were Clinical Librarians
- 13 eResources and Systems Librarians
- 7 were Training Librarians
- 40 were Librarians
- 20 were Library Assistants
- 5 where no role was declared

NB: Four users categorised themselves into more than one role, therefore the total number in this list is higher than the 172 respondents to the survey.

### 2.5.1. Analysis Method and Outputs

28 user needs were scored by users on a range from 0 - I have no need to 4 – I definitely need the website to...

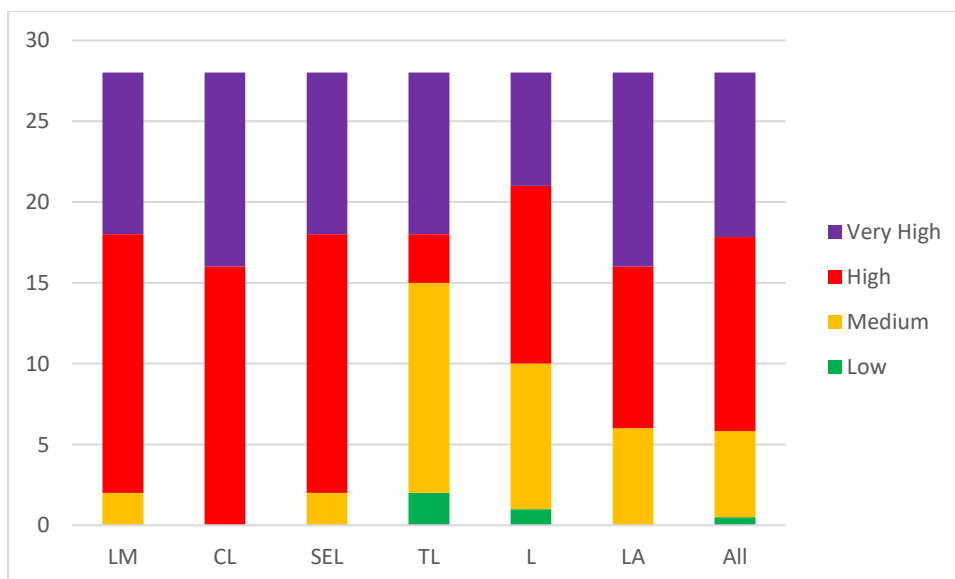
*Have a logical and intuitive structure, to make it easy to navigate and find what I want*

Each need was then categorised into **Very high**, **High**, **Medium** and **Low** priority user needs depending on the average score of the responses.

Key: **yellow = Low need**, **orange = Medium need**, **red = High need**, **purple = Very high need**

Please refer to the Analysis page in the LKS Discovery User Needs Survey Results and Analysis for the analysis to score the user needs.

The levels of user need per user role group are shown in the table below.



LM = Library Managers; CL = Clinical Librarian; SEL = Systems/eResources Librarian; TL = Training Librarian; L = Librarian; LA – Library Assistant.

Of the 172 users who participated in the user needs survey:

- 75% definitely need the site to act as a single point of access to LKS policy documents, guidance, training, publicity, toolkits, case studies, best practice, resources and How tos
- 88% definitely need good search functionality and filtering to find only relevant documents easily and save time
- 95% definitely need the site to have a logical and intuitive structure, to make it easy to navigate and find what I want

The overall need for a website to act as a single point of access to LKS policy documents is very high.

Overall, looking at two highest levels of need, 4 and 3, six user needs are rated very high, twenty needs are rated high and two are rated as medium. None are rated low.

The level of need was consistent across the user roles of Library Manager, Clinical Librarian, Systems/eResources Librarian, Training Librarian, Librarian and Library Assistant, for most needs.

However, there were some role specific differences. For example, training librarians, librarians and library assistants had less need for collaborative and communication tools than library managers, clinical librarians and systems/e-resources librarians. Training librarians, not unsurprisingly, had a high need for the site to act as a repository of critically appraised papers, training slides, search strategies and lesson plans than other roles, whereas this was only a medium need for systems/e-resources librarians.

The elements under the look and feel of the site and personalisation themes are regarded as important. The exceptions were the site being optimised for mobile device, and using OpenAthens for site authentication, which tended to be rated as a medium need from those roles with a limited requirement for outreach, but a high need from those roles which have more of a customer-facing role.

While the need for the site to act as a single point of access to LKS documentation was very high across all job roles there was less need expressed for the site to act as an archive. Respondents saw more value in having a site with up-to-date documentation and current practice.

### **2.5.2. Prioritising the User Needs**

The evidence from the user needs survey and other user research was used to inform the initial round of user story prioritisation (on 23 April).

The prioritised backlog of 28 user stories, is available in the User Story Backlog spreadsheet.

The backlog spreadsheet also includes the validated level of need per user story for each user role from the survey, as well as notes on the origin and development of each user story.

### **3. Annex 1 – Discovery Research**

#### **3.1. User Participants (In Moderated Activities)**

All the users below were involved in phone interviews or the user needs workshops.

##### **3.1.1. User Interviews**

1. LKS Development Manager, Health Education England x 2
2. Library & Information Services Manager, NHS Foundation Trust
3. Deputy Head of LKS and TEL, Health Education England x 2
4. Head of LKS and TEL, Health Education England x 2
5. Service Manager, NICE
6. Associate Director, NICE
7. Site Libraries Manager, NHS Foundation Trust
8. Library Services Manager, NHS Foundation Trust
9. NHS LKS Development Manager, Health Education England
10. Knowledge Services Development Lead, Health Education England
11. Mental Health Librarian, NHS Foundation Trust
12. Systems Librarian, NHS Foundation Trust x 4
13. Library Manager

##### **3.1.2. Workshop**

1. Library Services Manager, NHS Trust x 6
2. Corporate Support Librarian, NHS Trust
3. Site Manager/Clinical Librarian, NHS Trust
4. Library Assistant, NHS Trust
5. Training Development Librarian, NHS Trust
6. Knowledge Management Programme Manager, Health Education England
7. Clinical Outreach Librarian, NHS Trust
8. Senior Librarian, NHS Trust
9. Library and Knowledge Services Manager, NHS Trust x 3
10. Librarian, NHS Trust x 4
11. Head of Knowledge Services, NHS Trust
12. Head of Library and Knowledge Services, NHS Trust
13. Library and Knowledge Services Manager, NHS Trust
14. Clinical Librarian, NHS Trust x 2

15. Resources Librarian, NHS Trust
16. Assistant Librarian, NHS Trust
17. Librarian & Knowledge Specialist, NHS Trust
18. NHS Liaison Support Librarian, NHS Trust
19. Library and Knowledge Lead, NHS Trust
20. eResources Librarian, NHS Trust
21. Library Service and Learning Centre Manager, NHS Trust
22. Site Librarian, NHS Trust

#### **4. Annex 2 - Outputs**

These outputs have been delivered in accordance with the project proposal:

- a. Initial research into functional requirements and survey
- b. Detailed notes from stakeholder interviews
- c. User needs workshop run sheet, prompt sheets and videos
- d. User Journeys
- e. User proto-persona profiles
- f. User stories backlog (including validated user needs)
- g. Report (this document)