

Picking the right tools for the job: Personas, Scenarios and Patron Driven Acquisition (PDA)

Introduction

The following chapter reflects on the i2c2 workshop titled “How would Theresa May respond if all available copies of a book she urgently needed were out on loan? Exploring the use of PDA to deliver first class and super quick customer service in an academic library”. In this chapter we will introduce the Patron Driven Acquisition (PDA) model used at the University of Sussex Library and explain how it has been implemented to meet our users’ needs in a variety of ways. In addition to discussing the benefits and challenges of using PDA as an innovative tool for collection development, the chapter will also introduce ‘personas’ and ‘scenarios’, discussing the relative merits and limitations of using these web design tools to explore user-centred services. The first half of the chapter will provide a case-study of how PDA is used at Sussex, with the second half giving practical guidance on how personas can be used in a workshop situation to explore the potential of such services.

PDA

Patron Driven Acquisition or Demand Driven Acquisition (PDA/DDA) is a collection development tool that has been well documented over the past ten years as its popularity has grown¹. Allowing a Library’s users to become partners in the purchasing of materials, mostly with regard to e-books, has been a welcome disruption to many institutions battling space and budgetary concerns resulting from the conventional approach to collection development. The traditional model of Librarians selecting books to build enduring collections that may or may not be relevant to the teaching and research needs of the institution is not sustainable for most. We cannot predict which items will be used and which will grow dusty, only to be weeded out a later date as part of a stock review.

PDA/DDA offers a solution to these issues and we will be looking at the e-book model in this chapter. This is a system by which thousands of e-book records can be added to a Library’s catalogue or resource discovery tool on a loan model, where purchase occurs once a “need” has been proven (e.g. the e-book becomes part of the permanent collection after three loans). In this way only items that display relevance to the Library’s users are purchased. As Lugg explains “titles selected through PDA are guaranteed at least one use, by the patron who requested the item. This ensures that investment in collections has a direct benefit to users. PDA for e-books makes it possible to collect for the moment of need without bearing the full cost of collecting for the ages”¹ (p 11).

PDA at Sussex

As discussed in the workshop, the University of Sussex Library operates with a lean Library staffing structure, not employing traditional subject librarians. Instead there are teams under a banner of Academic Services which support the needs of the University: Learning and Teaching Support, Research Support and Collection Development. We rely on nominated Library Representatives within each academic department to engage with the Library and act as a channel of communication to represent their colleagues and tell us which resources they require. In this way, Sussex has been patron driven for a long time. We listen and respond to the needs of our users rather than imposing our own purchasing decisions upon them. PDA for e-books has therefore been a natural development for us and fits perfectly with existing ways of working.

At Sussex we have been using EBL for PDA since 2012 and in this time the scheme has been immensely popular. We currently offer around 60,000 titles via our Resource Discovery System (Primo) and with a back catalogue of approximately 450,000 titles that we can also choose from, we found EBL’s subject coverage to be most suited to Sussex. There is a free five minute browse period before a 24 hour loan kicks in. After three loans, the e-book becomes part of our permanent collection and is added to the Library catalogue. During the loan period, titles can be fully downloaded to a laptop/PC or mobile device with the majority being compatible once the BlueFire reader software is installed. Since the start of PDA with EBL in 2012 we have bought 829 titles and seen 10,205 loans at a total cost of £142,500, although at the time of writing this chapter in June 2014 the total spend from September 2013 to date has been a massive £162,150! Interestingly, there have been 31,960 free browses at no cost to the Library, which has been a significant benefit to using this tool.

Once the use of PDA was established, we started to consider new ways of exploiting the system to achieve a high level of customer service. An obvious option was to introduce e-books as an alternative to the traditional printed supply of inter library loans. We consulted with EBL to see which other University libraries were already doing this and identified King’s College Library as a helpful source of advice, as they have been running this service successfully. We arranged a visit to speak with the Interlibrary Requests (ILR) team and other staff involved with the implementation of EBL PDA, which was extremely useful with developing our own procedures.

We decided to train the ILR team to check every ILR request for availability on the EBL wider catalogue of titles, which can be easily searched via their Librarian portal LibCentral. If a title was found to be available, we would activate or switch on the 'visibility' of the item so that it could be found via the EBL user-facing resource. An email was sent immediately to the user who made the request with a direct link to the e-book and a short explanation that the book was available for immediate access if they were happy with the format. If not, they could continue with a request for the printed item if preferred. We followed the example of King's College Library in offering the EBL e-book at no cost to the user, whereas a printed ILR would cost them two pounds as usual.

This service proved extremely popular and we gathered a significant amount of feedback showing how pleased users were with the immediacy of the service. Very few users declined the e-book in favour of the print. When reviewing this service a year later we found that 60% of EBL e-books added to our patron plan for ILR's were used at no cost to the Library, as the five minute free browse period was not exceeded. This created a saving for the Library, avoiding both the British Library ILR fee and the cost of an EBL loan.

Another measure we took to offer improved and innovative customer service was to try and supply instant access to an EBL e-book where an item was suspected to be 'missing' and reported to the Information Hub (our enquiry desk). All Duty Librarians were trained to search the EBL wider catalogue and activate an item if found. This would be carried out whilst the user was present and enable them to use the text straight away. We also explored collection building in new subject areas using PDA. Drama is a subject still relatively new to Sussex, where print collections are mostly lead by reading list requirements. In collaboration with EBL, we asked for a list of new Drama related titles published within the last five years. This request generated a list of seven thousand titles which we examined, approved, and then activated as part of our PDA plan. The new e-books were added to our Library Search (Primo) and academic faculty subsequently alerted to the extension of the collections. Altogether this process was swift and simple to execute. It would not be possible to add this many printed books to the collection, even if we had a dedicated team of Subject Librarians and we therefore considered this to be a quick win in collection development with many future possibilities.

Finally, we implemented a policy to ensure that all purchase suggestions from our users, whether students or academics, would be fulfilled where possible with an EBL e-book added to our plan. Similar to the ILR procedures, an email would be sent to the user who placed the purchase suggestion with a link to the item on the EBL wider catalogue. If a printed book was still preferred, we would order and add one to the collection (with the usual wait time of two weeks). However, we again found that most people were delighted to be offered instant access to whatever they needed, with the bonus for us that each e-book would only become part of the permanent collection if significant use was displayed.

As EBL PDA now fits so neatly into our workflows, we are considering rolling its usage out to other areas of service provision. Firstly, we would like to replace items that are considered to be permanently missing with a PDA e-book. We would therefore only be replacing with a permanent copy those materials that are deemed as useful. Secondly we will be exploring resourcing new areas with e-books by opening up our patron plan. For example, there will be new courses in Pharmacy at Sussex for 2014, which has never been taught before. If we can liaise with EBL to add thousands of new titles with instant access, this will be invaluable to setting up collections in this area. Similarly, we plan to target academic departments with little stock usage, low NSS scores or those with concerns about Library provision with a view to adding a critical mass of e-books to their subject area via PDA.

Personas

The practical portion of the workshop introduced the concept of 'personas', originally a tool for web design and in this session repurposed to explore the role of PDA in supporting different types of library user. The creation and use of personas initially developed from the field of interaction design. Cooper² (p 124) describes personas as "hypothetical archetypes of actual users", the use of which has now spread beyond software development and been applied to both space and service design³. The Learning Space Toolkit⁴ (p 1) states that "the goal of the persona creation process is to move teams from standard ways of categorizing users to embodiments of key traits that are built around needs, motivations and preferences". Understanding these drivers should be central to designing effective services; in the case of this workshop considering the ways in which PDA can support learning and teaching.

Adlin and Pruitt⁵ define two different types of persona: data-driven and ad hoc. Data driven personas are those informed by user research, survey results, and feedback. This is information that all institutions gather, although may not be available in a workshop situation. Ad hoc personas are those based on our own experiences of supporting users on a daily basis. With the ad hoc approach there is a danger of stereotyping⁶ and the use of personas should definitely not replace dialogue with actual users. However, personas can prove particularly helpful when users aren't available⁵. This may not be the case with an engaged student body but in a workshop situation personas provide a way to explore practical solutions to the challenges that institutions and their users face. There are challenges in using personas: as

previously experienced by one attendee, for a heterogeneous user group such as 'academic library users' it is possible to create a multitude of personas as there is no one archetypal library user. It is not always easy to know where to draw the line, particularly when designing a service that is intended for a wide range of patrons. To overcome this issue a small number of primary users were identified for the workshop.

Running the workshop

A number of elements were taken from similar sessions^{7, 4} to create a structure for the workshop that would fit in the allotted time of one hour. Using 'Pastiche Personas' is one way to help speed up the process of creating personas. Pastiche personas are characters taken from novels that already have a personality, which can help teams to focus and better empathise with the persona⁸. Although this may be true, it is another step away from the actual users that we are trying to help. As such, a slightly different approach was taken. Inspired by pastiche personas, celebrities were used to help attendees visualise the barriers that users might be facing. However, instead of designing services for these particular celebrities, the idea was simply to provide a familiar face that would embody the traits of a corresponding user group. Consequently the three personas used in the workshop were:

- *Senior Academic – Theresa May*
- *Postgraduate Researcher – Matt Smith (Dr Who)*
- *Undergraduate – Peter Parker*

Workshop attendees were split into three groups with each being assigned a different persona. Following the Proto-Persona Workshop guidelines⁷ each team was asked to develop their persona by deciding their age, where they are based, their state of mind and their motivation. They were given five minutes to do this. Building up a complete picture of the persona allows groups to gain a better understanding of their users and their reasons for using Library services. The group with Theresa May decided on the following attributes for their persona, based on their own experiences of supporting academics:

- *Senior Academic: Theresa May*
- *Age: 50+*
- *Location: Office (theirs)*
- *State of mind: Traditional, stressed, short of time, feeling REF pressure.*
- *Motivation: Wants to do research and get all else out of the way, wants paper copies of books, wants to save time.*

Do these sound familiar or are these completely different from your own experiences? Without the data to inform the creation of personas it is easy to see how stereotypes can develop, although Turner and Turner^{6 (p 36)} argue that in cases such as this "non-prejudiced stereotypes may actually say something accurate about a group of people".

Having discussed the motivations of their particular personas, teams were given five minutes to move on to defining their "user goals"⁴. This was done by asking each team to think of three user goals related to books. With data driven personas this could be informed by customer comments, survey feedback or focus groups. In the workshop, without this information available, an ad hoc approach was taken with anecdotal evidence used instead. This gave attendees an opportunity to share information about their own experiences and enabled groups to develop a shared understanding of the goals of their persona. This can be particularly important with staff from different backgrounds whose experience of supporting users can vary greatly. Building on the motivations of each persona, user goals were formulated by creating statements beginning with 'I want' or 'I need'⁴. The group with the Peter Parker Undergraduate persona developed the following user goals:

- *I want a book that is on my reading list*
- *I need a particular book now*
- *I want to be able to download books to use on the move*

To move onto the next phase of service design, teams were given ten minutes to create scenarios for their persona. As UX think^{9 (p 1)} explain, "personas are characters and scenarios are the plot". Scenarios should describe a specific task that needs to be accomplished by a persona and be informed by the motivations of that persona and their user goals. Scenarios should state only what the persona wants to do, not how they will go about doing it¹⁰. Narrowing down the scenarios in this way would leave little room for designing new and innovative services if personas were already placed in a situation where they have to use existing services (although this approach can be valuable as an evaluation tool). Similar to personas, scenarios provide a shared understanding about the situations in which particular users engage with the Library. As McQuaid et al.^{11 (p 122)} found, "combining a persona with a specific scenario provided a narrative that

allowed people to see (and hopefully vicariously feel) what customers experience as they try to accomplish their goals". For the Postgraduate Researcher, the group came up with the following scenarios:

- *Matt Smith is away from campus and another patron needs to use an item that he has on loan*
- *Matt Smith needs to access an item held by the library but can't get back to use it*

The final stage of the workshop involved each group developing their scenarios into user journeys, where the designing or evaluation of the service can really start. Groups were given ten minutes to create user journeys based on their scenarios with particular consideration given to how PDA might help a user in this situation. In this sense the user journeys were evaluating PDA as a potential new service. The user journey created for the Postgraduate Researcher scenario was:

- *Scenario: Matt Smith is away from campus and another patron needs to use an item that he has on loan*
- *User journey: When the patron requests the item from Matt they are given a choice, they can wait for Matt to return his copy or if they need the item urgently they can access an e-book copy immediately through PDA. Matt is not involved in the process.*

In this example PDA provides a service that means Matt can potentially keep the book he currently has on loan and the other patron can access a copy immediately and does not have to wait for the print copy to be returned.

Conclusion

The user journeys created by the different groups demonstrated how PDA can be used to positively disrupt some of the Libraries most traditional values and services by giving users more power over how the collection is developed and accessed. For those prepared to engage with e-books, PDA offers a tool to create a dynamic collection that can be developed and accessed quickly. This is supported by Tyler¹² who found that titles acquired through PDA were borrowed more than others. This is not surprising given that books acquired through PDA will be used by at least that one student. As Becker¹³ (p 182) argues, PDA is "helping bridge the gaps between e-book needs, usage and availability from the library". This was supported by the motivations, scenarios and user journeys of the personas. The groups found that PDA had the potential to help all of the different user types represented by personas and this has also been the case at Sussex. We feel proud of our innovative uses of e-book PDA and it has been immensely rewarding to see usage so high and feedback in such positive terms. We now offer our users over 10,000 e-book titles and feel that the format has been accepted as a normal and valued aspect of Library resource provision.

If "the present literature on personas fails to reach consensus on the significant and universal benefits of incorporating personas into design processes"¹⁴ (p 417), this chapter will do little to alter the situation. Applying personas in a workshop situation simply demonstrated some of the larger issues on a smaller scale: personas brought teams together in thinking about how PDA could help users achieve their goals but being fictional characters (which may have been exacerbated by the use of celebrities) undermined buy-in from some attendees. Ad-hoc personas seemed to work well in a shorter time frame as data did not have to be analysed but again this approach may have diminished credibility and illustrates one of the potential pit-falls in using personas¹⁵. It is more appropriate to think of personas as another tool that we can use to build our understanding, one that we may only need to turn to when others have been unsuccessful. In the same way that we would not want to rely on PDA as the sole method for developing our collections, we would not want personas to be our only attempt to understand users.

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