

Date: September 27, 2022

To: SILS Operations Team  
From: Discovery Operations Subteam

Re: Formation of a UX Subgroup

## **Problem**

The Discovery Operations Subteam will form a new subgroup focused on the improvement of user experience for UC Library Search.

The Discovery Subteam's objective, [as stated in its charter](#), is *"to improve the experience of discovery and delivery for users across the UC Libraries through iterative research and development."*

However, over the past six months the group has not engaged in any coordinated user research or usability testing. The group's agendas have been dominated by requests and topics brought forward by the other subteams (E-resources, Fulfillment, Resource Management, etc.). This is understandable since the work of those other subteams produces effects that are visible in the discovery layer. But usability and accessibility are extremely important and we must find a way to make time to address them.

A second challenge to addressing the stated objective is the membership of the group. The set of people in the UC Libraries best suited to make decisions about the topics brought by the other groups that affect Discovery has only a partial overlap with the set of people best suited to perform user research and user interface design. But the "one member per campus" policy for subteam membership prevents the inclusion of staff with the required skills.

## **Solution**

To address the problem described above, we will form a new expertise subgroup charged with UX improvements to UC Library Search. This group will take on the task of conducting user research and producing design solutions that will improve the usability and accessibility of UC Library Search. A few campuses have already begun conducting usability tests locally. This subgroup will enable us to share results and coordinate our future efforts.

Total membership will be variable, but we expect to have 4-6 Discovery Subteam members in the subgroup at any given time. This subgroup will require the addition of new members beyond those in the existing Discovery Operations Subteam. Several campuses employ students to assist with UX tasks. These students will be invited to participate in the meetings and projects when their schedules permit.

The scope for this subgroup is open-ended, so the subgroup will work in 1-year phases, and make a recommendation to continue working or not at the close of each phase. The expected time commitment from each member will vary widely depending on tasks assigned. For some, it will be as little as 1 hour per week. For others, it may be up to 20 hours per week.

# UC Library Search UX Subgroup

## Charge

Conduct UX research and produce design solutions that will improve the usability and accessibility of UC Library Search.

## Membership

- 10-17 campus members
  - 1 Project Manager
  - 3-5 current members of the Discovery Operations Subteam
  - 3-5 new members
  - 3-6 student employees from multiple campuses
- Each member *must* have prior experience in either user research or interface design
- New members and students are *not* required to participate in the general Discovery Operations Subteam meetings except when presenting their deliverables.

## Time Commitment

- Project Manager
  - 1-2 hours per week
- Researchers & Designers
  - 1-2 hours per week for general participation in meetings and reviews
  - 10-20 hours per week when actively conducting research or creating designs

## Duration

- The project will progress in 1-year phases.
- At the end of each phase the subgroup will make a recommendation on whether the project should be extended for another year.

## Scope of Work and Deliverables

- Conduct user research, including but not limited to: user interviews, stakeholder interviews, usability tests, accessibility audits, environmental scans
- Present research findings via presentations and/or reports
- Iteratively create design solutions and test, present, and gather feedback on them

## Out of Scope

- *Harmonization*
  - Each campus will decide which of the proposed design changes it will accept.
- *Implementation*
  - This subgroup is not responsible for implementation of the designs.
  - However, campuses can share their implementations with each other using the [shared code repository](#) to avoid duplication of efforts.

# Preliminary Logistics

*The following information is both incomplete and tentative.*

## Membership

*Zoe Tucker will replace Joshua Gomez as the UCLA representative on the Discovery Operations Subteam. Joshua will then take on the role of Project Manager for the UX subgroup.*

- From Discovery Operations Subteam
  - Sean Claudio (UCI)
  - Jesse Kruppa (UCR)
  - Zoe Tucker (UCLA)
  - Jess Waggoner (UCSC)
  - Doug Worsham (UCSD)
- New/Non-Discovery Subteam Members
  - Joshua Gomez (UCLA)
  - Lisa Weber (UCB)
  - ?
- Students
  - Ruth Lee (UCLA)
  - Taylor Che (UCLA)
  - ? (UCSC)
  - ? (UCSD)

## Project Manager

- Joshua Gomez (UCLA)

## Meetings

- Every other Friday @ 10:10am, starting September 30th.
- First Meeting Zoom:  
<https://ucla.zoom.us/j/95021133578?pwd=V2tRWFNUU1Z1aEc1OWpFQTZrUjhMz09>
- Agendas/Notes in same Confluence space as Discovery Subteam:  
<https://uc-sils.atlassian.net/wiki/spaces/DIS/pages/1843167431/Meeting+Notes>