Understand, Identify, and Respond: The New Focus of Access Services

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abstract: Library public services staff have primarily focused on providing services through interactions with their users. Although service quality and customer satisfaction are important in the delivery of these services, the emphasis and nature of the work have often been influenced by a library-centric philosophy rather than a user-centric philosophy. The majority of tasks and responsibilities of access services staff have historically been focused on the completion of transactions rather than on how these transactions impact user experience. This essay describes changes in organizational structure, employee training, and position responsibilities of Access Services staff at Grand Valley State University in Allendale, Michigan. These changes were made intentionally to better understand, identify, and respond to user needs. The ideas, processes, and structures presented in the article can be applied to all academic libraries, and we argue that the new focus of access services should be to improve the academic library experience.

Introduction

The goal of academic libraries has long been to support the mission of the university by providing access to collections and resources; instruction on the use of collections and resources; and an environment in which to use these materials. While not a comprehensive list, academic libraries are also increasingly involved in the following:

- Promoting and advocating for the need to transform traditional scholarly communication
- Providing open access to information resources
- Offering active learning environments
- Developing strong collaborative partnerships with others on campus to access, manage, organize, analyze, and preserve a growing amount of digital data.

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Libraries play an important role in campus student recruitment, retention, and success initiatives by providing student-centered services, technology-rich learning spaces, and opportunities for students to engage with other students and educators. Libraries can also integrate their services into high-impact educational practices, such as first-year seminars, learning communities, and undergraduate research.

Academic libraries have continued to evolve by responding to societal changes, technological advances, changes in higher education, and emerging library user needs. Library spaces have frequently been reimagined in response to changing expectations. Libraries have become dynamic learning environments that include new types of furniture, advanced technologies, and a variety of surroundings that include bright and dim, quiet and loud, and indoor and outdoor spaces. Academic libraries are often the largest buildings on campus, and most provide increased access to computers, printers, scanners, and other technologies. The number and diversity of services provided in libraries have also increased, often through partnerships with other campus departments. Some of these services are new; others are existing campus services that have been relocated to the library.

Libraries have also reduced restrictions on visitors and become increasingly inviting and welcoming. This shift began in the 1990s when libraries began to relax food and drink policies as well as provide new spaces for collaboration, signaling an intentional shift to a more user-centric model. Decisions began to be based not on collections or library staff but rather on the needs of library users. Many of these changes have resulted from fundamental changes in the philosophies and cultures of library organizations. This shift has often served as the basis for reviewing and updating policies, procedures, and organizational structures.

As this concept of providing a user-centered library experience has gained momentum, many academic libraries have created new positions that focus on developing a deeper understanding of library user needs and improving how people experience the library. Following the trend from the corporate sector, many of these positions initially focused on improving the online experience of the library. Recently, however, greater emphasis has been placed on improving not only online access but also the entire library experience, including how our users interact with the full range of services, resources, spaces, and staff. Steven Bell has referred to this as “totality” or the total experience that library users encounter at all touch points. Although all library employees influence user experience (UX), the authors believe that access services staff are uniquely positioned to make an especially profound impact and should assume an active leadership role in library UX initiatives.
Access Services: An Opportunity to Impact User Experience

Typically, the various departments that comprise access services—namely circulation, course reserves, interlibrary loan, and stacks maintenance—fall organizationally within the public services division. Although these units often work under the umbrella of one department, many work independently. All of these units have a tremendous opportunity to impact library users’ perception of library services, but unfortunately, many do not deliver library services in a coordinated manner. The work of access services staff is often similar across units, and there are opportunities to explore efficiencies and new approaches, workflows, and philosophies that are user-centric rather than library-centric.

Access services staff have always been in unique positions to understand user behavior and preference. Jim Neal highlights the following:

Access services opens the library in the morning and secures it at night. It serves as our essential link to campus operations, like building maintenance, security, and food services. It oversees the quality and usability of library space . . . It circulates materials and technologies . . . It supports teaching and learning through traditional and electronic reserves, enabling a strong presence for libraries in course management systems and online education. It is the front line of our consortial relationships, managing an expanding array of regional, national, and global interlibrary loan and document delivery services that support quality scholarship. It is the early warning system for building environmental issues and collection preservation and damage problems.

Access services staff also answer questions, provide direction, respond to suggestions, and accept criticisms. With the consolidation of service desks, they often staff the primary place where library users ask for help. The majority of academic libraries are open more than 80 hours per week, and access services staff are often the only staff available to provide library services and respond to user needs during all hours that the library is open, including late evenings and weekends.

In addition to physical contact, access services staff are typically the ones that provide the most contact outside of the library through mailings, text messages, phone calls, e-mail messages, and now social media interaction and chat sessions. Often, the purpose of this communication is to provide information and increase awareness of policies and procedures. Access services staff are often responsible for enforcing library policies involving overdue materials, library fines, and library security and safety as well as disciplinary actions. They have the opportunity to greatly impact user experience by ensuring that current needs are met and that future needs will be identified.

Seeking to improve the experience of library users is certainly not a new concept. S. R. Ranganathan’s five laws of library science, written in 1931, are user-centric in nature. However, libraries often identify areas for improvement in reaction to a problem, which is a reactive model. It is important that libraries move to a more a proactive model in which the staff work to understand and respond to user needs by implementing user experience research technique and by prioritizing this kind of work.
Understand, Identify, and Respond: The New Focus of Access Services

University Libraries at Grand Valley State University

Grand Valley State University (Grand Valley) is a comprehensive state institution in western Michigan with a student enrollment of 25,000 students. Five libraries make up the University Libraries with the Mary Idema Pew Library, at the Allendale campus, serving as the main library. The libraries are staffed by 69 faculty and staff, with the majority of them working in either the Research and Instructional Services (R&I) Division or the Technology and Information Services (TIS) Division. Each division has a role in providing public services; the Access Services department is part of the TIS Division, and Reference Services is part of the R&I Division.

In 2010, a single service desk was created at the main library that combined the reference desk and circulation/reserve desk. Staffed by Access Services staff and student assistants, the desk provided basic reference assistance while referring more complex questions to an on-call librarian. Librarians who no longer worked at the reference desk repurposed their time to other areas, such as scholarly communication, the development of a campus institutional repository, open access, data reference, data management, incorporating information literacy into curriculum, and providing more one-on-one research consultations.

In preparation for the construction and opening of a new type of learning environment, the University Libraries at Grand Valley began discussions on how to transform not only the physical space but also library services and organizational structures that would create a deeply and intentionally student-centered learning environment. The Learning and Information Commons at the Mary Idema Pew Library, a $65-million facility that opened in 2013, was designed to meet the current and future needs of Grand Valley students with four guiding philosophical principles:

1. Align the library environment with the student environment.
2. Make learning visible.
3. Allow students to manage their own environments and learning.
4. Provide an environment that inspires and engages.

For the building design to truly work, we needed not only a culture that would understand and embrace these principles but also an organizational structure that would facilitate and support the implementation of these principles once the library opened. Although everyone in the organization had an important role in ensuring success, it was necessary for library faculty and staff in public services to rethink their roles as well as their focus.

We knew that success of the new library and student-centered philosophy would require us to continuously understand how library services, spaces, and technologies are used; to identify emerging needs; and to aggressively respond to these needs. These three efforts—to understand, identify, and respond—became the foundation and focus of the University Libraries, and in particular of Access Services.

Access Services Transformation at Grand Valley

Organizational change can be challenging, and it is often difficult to know where to begin. We only briefly summarize our transformation process here, but two of the primary
factors that contributed to our successful reorganization of Access Services were: (1) we established a common purpose; and (2) the process was deliberate, inclusive, and largely based on this new shared purpose.10 

Historically in access services—and our organization was no exception—people tend to pass time-honored traditions, policies, and procedures from one generation of staff to the next without stopping to ask: Why do we do things this way? Does this produce the best outcome for our users? Simon Sinek states that good organizations start with the “why” rather than the “what” or the “how.”11 In a renowned TED (Technology, Entertainment, Design) Talk,12 Sinek introduces the concept of a “Golden Circle,” a model for how successful organizations interact with their customers. In this model, the “why”—the reason the organization exists and acts as it does—should lie at the center of every decision. All TIS faculty and staff watched the TED Talk video, and it became the inspiration for moving forward. After a few division-wide meetings, we established that our primary mission was to support student success, to better understand what students need, and to establish how we could better identify and respond to those needs. The Golden Circle in our localized example illustrates the “why” at the center of everything we do (see Figure 1); the “what” and the “how” should evolve over time and bring life to the “why.” Defining our “why” helped position our staff to embrace necessary change and inspired the services, resources, spaces, marketing, culture, and collaborations that the University Libraries would undertake.

With a renewed sense of why we were all here, we recognized that to take a more proactive approach in identifying and responding to user needs, we needed to carve out time for this effort in staff workloads. We began to thoroughly examine everything we do, alongside brainstorming the things we wished we had the time for or the resources to address. To help guide discussion, our management team developed an infrastructure for staff to self-identify redundancies, recognize opportunities for efficiencies, and develop a better understanding and appreciation of all processes performed by all members of the division. We also began to explore new ideas and emerging needs, shift from tasks to outcomes, and move from a library-centric to a user-centric viewpoint.

This detailed workflow analysis took 18 months to complete. Four high-level areas were identified and mapped out by staff: (1) access or ownership of Grand Valley library resources; (2) access to non-Grand Valley library resources; (3) lending Grand Valley library resources; and (4) non-collection services. As Figure 2 demonstrates, we mapped out the workflow of library resources from the time they were ordered, all the way through the time deselection might occur. The first three high-level areas were straightforward for staff to map out, but non-collection services became a vital part of our transformation. This was the category we used to explore the variety of functions carried out by the Access Services department that had little to do with tangible collections or task-oriented work. It also became a place where we could explore areas for
Figure 1. The “Golden Circle” for Grand Valley State University Libraries, a model for interacting with their users in which the “why” is at the center of every decision.

Figure 2. The workflow for library resources at Grand Valley State University Libraries from the time they are ordered through the time deselection might occur.
growth, opportunities to improve service, and new challenges that we anticipated in our new facility. For example, we used this category to explore how we would handle service assessment, training, library tours, marketing and outreach, building security, and incoming and outgoing mail processes.

The analysis resulted in the transformation of Access Services into a more collaborative and user-centered department that we renamed Operations and User Services. The Operations and User Services Department consists of three units, or teams, that work closely with one another. The Downtown Operations team provides library services and manages the facility and collections at the two libraries in Grand Rapids, Michigan. At our main library in Allendale, two new teams were created: the Access and Delivery (A&D) team and the User Experience (UX) team (see Figure 3).

The A&D team is responsible for all “back of the house” tasks such as stacks maintenance, interlibrary loan, and course reserves. Creating this team enabled us to become more efficient with the similar tasks we performed in these areas (for example, digitization and book retrieval), while also allowing our interlibrary loan and course reserves staff to specialize in the more nuanced components of their work. The UX team replaced the Circulation Unit and became responsible for all “front of the house” areas that involve direct interactions—in person, online, or on the phone—with library users. The formation of the A&D team removed most of the task-oriented work from our service desk, freeing up the UX team to assume new roles and perform new functions. Library administration provided financial resources and gave decision-making authority to the UX team, allowing them to better understand, identify, and aggressively respond to user needs. This new organizational model ultimately created the additional capacity we

Figure 3. The organizational chart for Grand Valley State University Libraries
needed for the UX team to explore new ideas and quickly implement new practices that would enhance our customer service, deepen our understanding of user needs, identify new and emerging needs, quickly respond to user needs, and improve user experience.

This reorganization resulted in modifications to roles at every level in the department. A recently vacated reference manager position that had been outdated since the successful implementation of our single service desk was turned into a user experience librarian who leads the UX team. Staff were assigned an area of focus and a reporting line in either UX or A&D, and both groups were expected to work in the service desk environment. Assigning staff to a specific area provided them with a focus for how they would spend their “off desk” time.

Additionally, we placed a greater emphasis on the role of student employees. Around the same time we began this reorganization process, the library implemented a new peer-led reference consultation service, partnering with our campus Writing Center and Speech Lab to form a new collaborative service called the Knowledge Market. We learned about the benefits of peer-to-peer pedagogy and wanted to incorporate some best practices at our service desk. Since the primary audience on our main campus is undergraduate students, we positioned student employees to serve as the front face and first tier of our single service point. Professional staff moved away from the desk, which meant we needed to redefine employment categories and roles. The increased role of student employees enabled staff to participate more frequently in the development of student hiring, training, and performance evaluation practices.

By refocusing our priorities and reorganizing Access Services, we have better positioned ourselves to understand and respond to user needs. These changes have positively impacted our ability to deliver library service and have resulted in improved experiences for library users. By creating new staff roles and refocusing position responsibilities, we have gained insights into user behavior through a variety of initiatives, empowered staff to create positive change, and developed training initiatives aimed at improving service. This has expanded the potential impact the staff can make. Their role is no longer to simply provide a quality transaction at the service desk. Their understanding of what constitutes a positive user experience has grown, and so has their ability to improve it.

Our users’ perceptions about the library are based on their physical and virtual interactions with all aspects of library services, resources, and spaces. As a result, all library employees need to care about user experience.

The UX Team: Understanding, Identifying, and Responding to Needs [A head]

User experience in libraries is carried out in a variety of ways, and UX teams are often organized differently. At Grand Valley, we recognize that user experience should be holistic: our users’ perceptions about the library are based on their physical and virtual interactions with all aspects of library services, resources, and spaces. As a result, all library employees need to care about user experience. While a variety of Grand Valley
faculty and staff are involved in UX work at all levels, our UX team provides customer service at our single service desk and executes a variety of projects aimed at better understanding and improving user experience within the physical library.

The UX team allows us to be proactive rather than reactive about improvement. Our staff understand that every decision impacts user experience. We proactively look for “pain points” in the user experience—points of contact between the library and the user where something unsatisfactory happens from the user’s perspective—and then ideate ways to reduce them. We implement various user experience research techniques and prioritize this kind of work.

The UX students within our department also contribute to our enhanced ability to understand and improve the student experience of the library. In addition to taking the lead at our service desk, UX students roam the library to assist patrons at the point of need, ensure that the library is running smoothly from an operational standpoint, and collect data about how students are using library space. They also participate in various user experience-related research projects and initiatives. These students serve, in a sense, as the eyes and ears of the library. They see what is happening both in the library and around campus. As students, they are attuned to student needs in a way that professional staff are not. The focus of their positions is explicitly related to user experience. The first line of the job summary section in the UX student position description reads: “Join a team designed to create a better experience for library patrons in the new Mary Idema Pew Library Learning and Information Commons!” While students had previously worked at the service desk, this new focus helps make the most of their presence. They often make suggestions, and we regularly ask for their feedback and their perspectives on library-related issues. As a result, we are better able to understand how students experience and perceive the library.

A few projects, in particular, have allowed us to better understand user behavior and identify pain points for users within the physical library. One way that we have increased our understanding of user behavior is through daily data collection. Our UX students collect space use data on iPads when they roam the library. Specifically, they record traffic levels, conversation levels, and type of study in every library zone. This information has given us significant insight into how students use the library in an overall sense as well as how they use particular spaces and how library use varies from day to evening. This information has been useful for policy decisions and choices about when and where to host events and activities in the library. These data also helped us to identify underutilized spaces, which we now actively promote during peak times in the semester.

We have also increased our understanding of how students perceive library spaces and services through two ethnographic projects: cognitive mapping and touch point...
tours. In our cognitive mapping project, we asked random student patrons to draw maps of the library, labeling spaces and features. After they finished their drawings, we asked them to describe their maps. For touch point tours, we asked individual student patrons to give the UX librarian and a UX student a 30-minute tour of the library. In both projects, we gained insights about the spaces and services that were familiar and unfamiliar to students and learned the language they used to describe spaces and services. This also allowed us to identify potential marketing opportunities.

These ethnographic projects served as a strong reminder of an important principle of user experience: employee perception differs significantly from user perception. For example, during the cognitive mapping project, we asked some staff to draw maps of the library. Most of their maps looked much different from the student-drawn maps. Staff maps were more detailed in many areas but lacked some elements—such as printing rooms and public bathrooms—that were common in student maps. This exercise demonstrated to our staff in a tangible way that library employees think about spaces much differently from how students think about them.

Having a defined focus on improving user experience also allows us to regularly review common channels for identifying pain points. For example, our UX librarian reviews recorded service desk transactions, e-mails to the general library account, and chat transcripts. We collected these data previously, and our Web services librarian often reviewed the information to look for ways to enhance the library website. Now we use these data for an additional purpose: to look for patterns, trends, and pain points in the experience of the physical library.

For example, we used these data to identify that students had difficulty finding open seating during peak library hours. We knew from head count data that there actually was open seating available. It was difficult, however, for students to locate the open seats, and they would often get frustrated and leave the library. Additionally, we identified that, given the parameters of our study room reservation system, students could identify what study rooms were open for the upcoming hour but had difficulty determining what study rooms were immediately available. Once we had identified these pain points, we added features to our digital displays specifically aimed at reducing them.

These methods for identifying pain points within the user experience also allowed us to identify and respond to a problem relating to quiet space. Over the first three years that the library was open, the UX team received feedback in numerous formats that students felt the new library did not have enough quiet space. This is a complex issue, and our UX team hypothesized that part of the problem was that our quiet spaces did not have enough table space for individual use. As a result, students chose collaborative spaces so they could use a table but were then surrounded by louder conversation levels. In our winter 2016 semester, we decided to invest in some new furniture to minimize this problem. Instead of simply making purchases based on staff opinion, the team conducted several forms of user research that involved looking at student opinions regarding table space as well as their behaviors, including prototyping a potential solution. The team designed and implemented this research in a two-week period and completed a recommendation to share with library administration by the following week. This is an example of how the existence of our UX team allows us to act quickly, make user-centered decisions and investments, and, by extension, create user-centered environments.
The UX team also tries to ensure that people participating in events hosted in the library have a good experience, while balancing our mission to create environments that are conducive to learning. As mentioned previously, one of the guiding principles of the Mary Idema Pew Library is to offer an environment that inspires and engages. This includes hosting events in the library. The Mary Idema Pew Library contains two event spaces, a first for any of the University Libraries. The UX team works with our library program manager to help coordinate and provide support for most events, and we have found that their assistance provides a better experience for people organizing and attending events. Pop-up events, such as live music, are also sometimes featured in public areas. During the first several events, our UX team used a variety of strategies to gauge user reaction, including direct observation, placing feedback cards on surrounding furniture, and recording user feedback within our desk transaction data. We gained several important insights that are now utilized during event planning to increase user engagement and decrease the likelihood that students are annoyed or disrupted.

The UX Team: Training and Service Delivery

In addition to deepening our understanding of users and their needs, we have also developed new training initiatives and ultimately provided better service. While some form of training for our service desk staff and students has always happened, our new model allows us to be more intentional about training efforts.

Our library chat service provides an example of how our new model allows us to devote more resources to training efforts. Chat has been available on our library website since 2006, and chat questions have almost always been answered by the staff working at our service desk. However, there was never regular oversight of the service, best practices were not established, and staff did not receive much support or training for this service. When our chat widget was moved to a more prominent location on the library website in 2013, the number of chat questions increased, and it became more important to ensure that our patrons were receiving excellent service through this medium.

The existence of the UX librarian position gave us the opportunity to improve our chat service. The job responsibilities of the UX librarian include overseeing the services provided at the service desk, and this person regularly reads through chat transcripts. She has worked with other UX staff as well as liaison librarians to develop chat best practices and implement training workshops. She also started a “Chat of the Month” tradition where a chat is selected each month and shared with the staff who answer chat. The purpose of this initiative is to give staff opportunities to read how their colleagues have successfully answered chat questions. In 2015, we moved to chat software that allows patrons to leave ratings and comments after each chat session; according to chat rating levels, patrons are very satisfied with our current chat service.

We have also developed a more comprehensive UX student employment program as a result of our reorganization. The UX student training plan now consists of a full-day
orientation at the beginning of the fall semester, workshops that are often facilitated by our liaison librarians, and a variety of other training activities, such as reference challenge worksheets and website scavenger hunts. We have also added elements of gamification to our training processes and have experimented with larger-scale game-based training initiatives. Assessment efforts indicate that these elements have been successful. These training efforts are only possible because our reorganization freed up staff time to devote to this kind of work.

In addition to gaining specific knowledge, UX students develop skills that are transferable to their future careers, including customer service skills, professional poise, observational skills, and communication ability. UX students are also involved in peer hiring, allowing them to experience the hiring process through the lens of an employer. These learning opportunities are much greater than what we offered students employees in the past and are consistent with the mission of all academic libraries, which fundamentally includes supporting student learning.

We have received some preliminary evidence that users are more satisfied with library service than ever before. While we cannot prove causation, we think that improved user satisfaction may be partly attributed to our increased understanding of user behavior and our focus on training. In 2011, prior to implementing our new service delivery model, we conducted the LibQual+® Lite survey—a standardized Web-based survey developed and administered by the Association of Research Libraries (ARL). In 2015, after successful implementation of our new service delivery model in our new library, we again administered the survey. Data comparison shows improvement across the board in the nine areas surveyed in the “Affect of Service” dimension from 2011 to 2015. Most notably, survey respondents indicated higher satisfaction in the following areas: when interacting with employees; employees who instill confidence in users; dependability in handling users’ service problems; and employees who have the knowledge to answer users’ questions. This is strong evidence that our new service delivery model works and that our patrons generally have an improved experience when interacting with employees in our libraries.

**Collaboration with Research and Instructional Services**

The formation of the UX team has deepened the department’s collaboration with our Research and Instructional Services Division and, in particular, with our liaison librarians. Starting when liaison librarians first stopped working the service desk in 2010, and until the UX team was created, some of the liaisons lacked an understanding of what happened at the service desk. Questions asked at the service desk can give liaisons insights about students that can be useful in their teaching and outreach efforts. While service desk transactions were recorded throughout this time, the data were not always reliable, and no one did much with the information. Our UX librarian has implemented normalization strategies as well as motivated staff and students to more accurately record transactions. Her role also includes analyzing these data and sharing them within the department, with library administration, and with liaison librarians. Liaisons have noted that these data have been useful in a variety of ways. These data as well as chat transcripts also help the UX librarian identify training gaps. The UX librarian then works with liaisons to offer staff and student workshops and to create various other training tools.
In addition to our enhanced collaboration with the liaison librarians, their work has significantly evolved over the past six years. While these changes occurred in parallel with the changes in Access Services—the transformation in both areas were not a result of cause and effect—it is worth noting the impact of their work. Since pulling liaison librarians from the service desk, information literacy has become a core student learning outcome of the university’s General Education Program and part of a campus-wide systematic assessment program. Each librarian has written detailed instruction plans that demonstrate how information literacy is scaffolded in the disciplines, providing successive levels of temporary support to move students toward greater independence in the learning process, thus making library instruction more proactive than reactive. Intentional assessment of the expanded instruction program has revealed a statistically significant positive correlation between library instruction and student retention.

Conclusion

Each of the outcomes of our reorganization has had significant impact. Perhaps most importantly, we have moved to a model that is much more user-centric. Thinking about the “why” behind our department’s organization and the “why” behind the individual roles of our staff has challenged us to put user needs before our own convenience and has operationalized this concept. We regularly receive positive feedback from students, faculty, staff, and even high-profile visitors interacting with our UX team, and in particular our student employees, calling attention to their professionalism and the special care in which they engage patrons to exceed their expectations. We are proud that the formal data we collect in addition to the anecdotal feedback received often praise our staff, not just our state-of-the-art new facility. Similarly, our staff have embraced the change to the new service model. Those who were somewhat reluctant in the beginning have since become some of our biggest advocates when speaking about user experience as a concept, and they feel more empowered than ever to have a voice that can shape the way we deliver library services and enhance UX.

Grand Valley users likely differ in some ways from library users at other institutions, and our institutional makeup and library structure may also be unique. Our specific model would not make sense everywhere. However, refocusing the work of access services to proactively meet user needs can happen anywhere. We contend that, going forward, the primary focus of all access services departments should be to improve user experience by better understanding, identifying, and responding to user needs.
In addition to being more responsive, this new focus will enable libraries to more effectively anticipate future library user needs. Elements of the process we followed to realize our transformation could also translate well for administrators seeking a way forward to manage necessary change. While everyone in the library should care about user experience, making this the primary focus of access services is prudent. We not only envision user experience as the future of access services but also actively encourage library administrators to recognize this potential throughout their own organizations.

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Notes
18. Courtney Greene McDonald, Putting the User First: 30 Strategies for Transforming Library Services (Chicago: ACRL, 2014), 11.