Owning our impact:
Re-evaluating how we think about (and brand) vendor-owned systems

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Libraries make use of a great number of vendor-branded platforms and systems: catalogs and discovery layers, inter-library loan services, institutional repository platforms, and more. However, we often adopt the branding, jargon, and naming conventions of those systems when we present them to our patrons. This talk will discuss the importance of finding opportunities to take ownership of our services, even when they are facilitated by a paid software or platform. The reasons that we will discuss include: to increase visibility and find spaces for consistent branding, to future-proof our practices in the event of a platform transition, and to take ownership of core library services that—while facilitated—are efforts on the behalf of library workers for library patrons. This presentation will come from the perspective of a Digital Scholarship Librarian and Outreach and Communications Librarian, and will hope to prompt ongoing dialogue among participants.
Think of the vendor-branded systems that you use.

- Discovery services (Primo, Summon, EDS, Sierra, etc.)
- CatalogPlus
- QuickSearch
- ILLiad
- E-ZBorrow
- LibGuides
- Digital Commons, EPrints, CONTENTdm, etc.
- Others?
Now think about what you call these platforms when introducing them to your community.

As a reference librarian, on your website, as a liaison...
What are we talking about?

**Vendor**: a corporate entity provides this platform; sometimes, the platform may be open source/freeware

**Branded**: this platform comes with a name; sometimes, it comes with a logo, consistent color schemes, and/or marketing materials

**Systems**: platforms used as part of patron-facing services and workflows
Why are we talking about this?

- We assume that our library platforms are intrinsically valuable to our community.
- We get stuck on jargon.
- Sometimes, platforms just don’t work in a user-friendly way.
- Platforms don’t last forever.
Why are we talking about this?

We assume that our library platforms are intrinsically valuable to our community.

- By the time you’ve gone through all of the steps of adding a new platform (researching, acquiring, staffing, implementing), the benefit to the user can seem like a given!

- It’s also easy to assume that platforms are user focused out of the box.
Why are we talking about this?

We get stuck on jargon.

- Library workers’ expert decisions and jargon are not necessarily meaningful to the user.
- Often, in terms of vendor-branded systems, we adopt *their* jargon.
- If you don’t contextualize your new platform for your community, you risk alienating them.
- Does your new platform name or marketing describe what it is and what it does?
Why are we talking about this?

Sometimes, platforms just don’t work in a user-friendly way.

- A platform might do exactly what the library workers want...but does it do what the user needs or expects it to do?
- Our platforms often lack user-focused design and workflows.
- (Unfortunately, those aspects of the platform are often not directly under our control.)
Why are we talking about this?

Platforms don’t last forever.

- It’s easy to forget that we’re not only implementing a specific platform; we’re setting expectations about a service offered by the library.
- What happens when your library switches to a new provider for these services?
- Future-proofing is not always prioritized in our approach to platforms.
- Making platform-based, piecemeal decisions about library services does not allow us to realize holistic service to our communities.
What can we do about it?

- Evaluate what aspects of these platforms you control.
- Meet your community members where they are.
- Make noise when the platform doesn’t fit your community’s needs.
- Align and market services in a clear, consistent, and user-focused way.
What do we control?

It might be impossible for you to tweak platform aesthetics and functionality to your full satisfaction. Think about what settings you might have access to:

- **Look and feel**: Can you make changes to the user interface to promote ease of use? Can you make it clear that this is a product offered by your institution?

- **Error messaging**: Users can be frustrated by receiving a system-generated error. Can you alter the default messaging templates? ([Fuchs, 2015](#)).

- **Documentation**: Is it clear to users where they can find answers to their questions or get help?
What do we control?

It might be impossible for you to tweak platform aesthetics and functionality to your full satisfaction. Think about what settings you might have access to:

- **Accessibility**: Is this platform usable by individuals with disabilities? If not, start pushing your vendor.

- **Interoperability**: Is it clear to users how this platform relates to other platforms? Does this platform direct users to other platforms when necessary in the least frustrating way possible?

- **Cohesive design and promotion**: Let’s talk about some strategies.
Meet your community where they are

Perform regular needs assessment in addition to tracking platform data.
  - You don’t always get data about truncated or failed user attempts, and you never get data from platforms about the users who didn’t even try.
  - Talk to your community.  
    
    Be mindful of different statuses (undergraduate, graduate, faculty, staff, alumni, etc.), as these will influence the needs that are expressed. Your population is not homogeneous!

Low-cost assessments
  - Comment cards & whiteboards
  - Emailed surveys
  - Social media responses
  - Reference librarian and front desk interactions
  - Usability studies (on a budget—see Further reading section)
Make noise

If a platform doesn’t meet the needs of your community, tell the vendor!
  
  o If it’s a serious issue (e.g. accessibility), consider migrating to a new platform.
  
  o If you’re encountering these issues within an open source platform, consider how you might encourage the community to develop solutions.

We must be agile and willing to change when a service (particularly one that we pay for!) is not serving our mission, professional purpose, and/or community.

See also: “Sweden cancels Elsevier contract as open-access dispute spreads,” “French say ‘no deal’ to Springer as journal fight spreads”
Design and Promotion

An in-house design specialist is not necessary to adhere to basic design and promotion principles. Here are a few:

- **Naming**: Take ownership of third-party platforms when possible. Name them something descriptive and memorable. Again, avoid jargon in favor of clarity.

- **Style Guide**: Develop a consistent visual design. In addition to consistent colors & potentially logo use, also try to be consistent and clear in the language you use to refer to things.

- **Promotion**: How you promote a resource will depend on your institutional context. Use the expertise of liaison librarians to spread the word.

- **Audience**: Consider the needs of the audience you are reaching, as well as their competencies with similar systems or concepts. Speak to what they need to know, not what you think they should know. Again, avoid unnecessary jargon and fill in any necessary context. Make it clear what this service is for and how it fits with other library services.
How did we get invested in this idea?

An example to pull some of the threads together
Duquesne acquires Digital Commons...and so does Elsevier

Revising and future-proofing

Duquesne’s instance of Digital Commons was named for the platform (Duquesne Digital Commons) rather than for its function.

- The acquisition of bepress by Elsevier made us reconsider this choice—what if we left this repository platform due to restrictive practices, inflating prices, or ideological incompatibility?
- We realized that this type of thinking should have been part of our practice from the beginning.
Revising and future-proofing

So we decided to rename and rebrand.

- Duquesne Digital Commons became the Duquesne Scholarship Collection.
- We created a style guide, logo, and new marketing materials to lend to the recognizability of the platform.
- We sought to use user-focused language and rhetoric in order to explain what the platform was and how faculty members (and others) could use it.
- We determined our audience—our first materials were created in order to perform outreach to faculty.
Faculty outreach

- Consistent use of branding (logo, colors)
- Main headings in plain language
- Some jargon in longer text fields, but deployed (we hope) judiciously
- Link to resource—the user has a next step
This example does not demonstrate all aspects of reclaiming a vendor-branded system—we still have work to do!
Mythbusting
User-focused design: Mythbusting

“Doesn’t this focus on directing the user mean you’re assuming your users are incompetent? Isn’t this just railroading them into basic behaviors?”

No! The goal is not a “seamless user experience,” because there is no such thing as an experience that is seamless for all users. Rather, the platform should enable users to perform the basic functions without having to be experts, and to be able to find resources and experts to help when they need it. User-focused design is about empowering the user to explore, learn, and be successful.

“Should the technology grow — or the person using it?” (Ammer, 2018)

“Should they not grow together?” (comment, Ilaria Oberto)
User-focused design: Mythbusting

“Certain functions are necessarily complicated. Advanced search shouldn’t be easy.”

We agree! Advanced functions are necessary to enable power-users (and librarians). However, the design of platforms may assume a baseline expertise that does not serve the majority of community members. Evaluate your platforms to see if they are usable even without expertise. The default platform settings must serve our users with low technological/digital literacy or little familiarity with library services, at least to the point of effectively directing them to help.
User-focused design: Mythbusting

“Jargon is necessary for specificity.”

Absolutely! But think about your encounters with jargon in the past. It’s better when a disciplinary expert introduces you to it, right? It’s a kinder, more humane user experience to use plain language when possible, and to introduce jargon intentionally.
User-focused design: Mythbusting

“We don’t have an Outreach & Communications Librarian or anyone on staff with design experience.”

Most libraries don’t. Recognizing and correcting inconsistencies is the first step toward a more cohesive user experience. Considering the implications of our institutions’ platform choices and settings is the next step. Assessing the areas where you have control of your platforms will allow you to identify opportunities to improve user experience—no design experience necessary. It will also allow you to identify future priorities which may require funding or long-term coordination with platform support teams. It may even justify the creation of a more communications-focused position.
A (not so) radical vision

Library/university designed and supported software:

- OHMS (University of Kentucky Libraries), RedCap (Vanderbilt), Zotero, arXiv (Cornell), Evergreen ILS (Georgia Public Library System), Samvera (Stanford University, University of Virginia, University of Hull, Fedora)

Library/university supported open source:

- Moodle

Zotero is a project of the Corporation for Digital Scholarship and the Roy Rosenzweig Center for History and New Media. It was initially funded by the Andrew W. Mellon Foundation, the Institute of Museum and Library Services, and the Alfred P. Sloan Foundation.
A (not so) radical vision

Devoting funding and staff to the support and development of open source alternatives will allow library workers to better support their communities’ needs. Think about the improvements we could make to platforms if library workers and university technologists were involved in (and compensated for) their development and continued support:

- Ability to customize interfaces and functionalities to fit institutional needs
- More robust privacy protections
- Less danger of platforms being sold or acquired
- Community investment in sustainability and development
- Transparent infrastructure
- Ability to better serve underserved users
- Possibility for user participatory design (Ladner, 2015)
Activity

- Discuss your library’s existing public-facing vendor-branded systems with a partner (or better yet, use your device to show them!).

- Together, talk through opportunities to draw on the branding and refocusing ideas presented today in order to make these services more user-focused.

*This need not be confined to your area of expertise or functional role.*
Citations & further reading


University Library, University of Illinois at Urbana-Champaign. (n.d.). Usability tests. Retrieved from https://www.library.illinois.edu/staff/it/web-style-guide/usability-tests/