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UTA  Libraries

IMPROVING PATRON DATA COLLECTION



RECOMMENDATION REPORT

PREPARED FOR UTA
CENTRAL LIBRARY

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Improving Patron Data Collection

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Improving Patron Data Collection

Executive Summary

This section provides an overview of the issue of inaccurate data collection at the University of Texas at Arlington Central Library. SUMA is software that is used by the first and second floor desks of the library to record information regarding the type and time of interactions patrons make with library staff during their visit. This data is used to dictate staff scheduling, shows library traffic and what types of needs UTA library guests have. These statistics are also sent to the University of Texas system to provide funding for library events, materials and programs, and overall, provides numerical proof of the utilization of the library. An analysis of the work site in the next section provides context for why this issue exists, matters and how it can possibly be solved. Three different forms of research were conducted to grasp an understanding of the situation from all levels, guest, staff, and supervisor. The section following research provides details to the three solutions we propose: 1) implementation of a staff meeting explaining SUMA 2) having visual reminders posted near the first and second floor desks and 3) updating software to allow SUMA to automatically pop up when logged into the computer and changing the concierge button. These solutions are determined from staff survey results, supervisor interviews and other peers from the ENGL 3376 for feedback. The references section provides raw data from our research.

Work Site Description

The University of Texas at Arlington Central Library is the most visited library of the three on the campus. Due to its central location, the library provides a variety of services including collaborative work areas, quiet spaces, writing help, printing, audio/visual technology, technology borrowing, fabrication machines, special historical collection, well as many year-round programs. The library is used by students, non-students, faculty for a variety of activities, events, learning sessions and tours.

Issue at Hand

Patron interactions are inaccurately being recorded in SUMA. This means the data that gets sent to the UT System as justification for library funding and operation is skewed. Due to a disconnect between job expectation to record in SUMA and procedures, the hard work of staff members is also disregarded, as the amount and type of work performed is reviewed with records, SUMA included, that indicate how patrons are assisted. Overall, the inaccuracies in SUMA recording affect staff member scheduling, library funding and go beyond the university as record keeping for the UT System.

Research Methods and Results

Interviews

Interviews with three different full-time supervisors along with the prime designer of the SUMA software were conducted. The aim of these was to determine any commonalities the supervisors see with issues regarding staff operation and usage of SUMA. Three supervisors

mentioned the term “concierge” on the SUMA application to be confusing. Three supervisors also mentioned that team meetings with staff members are inconsistent and reactionary. One supervisor mentioned the inability to accurately edit the time of questions recorded in the case of not being able to input questions SUMA at the time being asked. The designer of SUMA pointed out that accessing the application on a computer is a little difficult, with all the other applications automatically popping up.

Team Observations

Different first and second floor desk workers were observed to track their usage of SUMA during a shift for a collective total of six hours, between 8:30 AM and 6:30 PM, during the week of February 27 – March 3. Out of the 12 workers observed, 4/12 recorded *all* of the questions they were asked during their shift in SUMA, 4/12 recorded *some* of the questions they were asked during their shift in SUMA and 4/12 recorded *none* of the questions they were asked during their shift in SUMA. The equal spread of question recording between none, some and all shows the disparity between knowledge and usage of SUMA.

Survey

An online survey was sent out to library desk workers to gauge their knowledge and usage of the SUMA application. In this survey of 20 respondents, 8/20 responses indicate the last time they were told about SUMA was a month or more before the start of this survey. This shows how SUMA reminders are not consistent or regular. The majority (13/20) recorded that they either sometimes, rarely or never record interactions in SUMA. 12/20 state their interactions sometimes or often do not align with the options given in SUMA, and this shows the lack of clarity with the meaning of SUMA buttons in a majority of workers. Out of 13 optional responses to change anything about SUMA, 6/13 mentioned the button concierge, similar to the recommendation the supervisors proposed. When asked why SUMA is not used, 16/18 respondents said they simply forget. (The other two responses were open ended and did not



relate to the question asked). When asked which methods

would make remembering SUMA easier, the top three were: 1) having SUMA automatically pop up after logging to the computer (18/20), 2) having SUMA emphasized during training (10/20) and 3) signing off on a daily task chart (10/20).

Proposed Solutions

Team Meetings

A meeting that explains the importance of using SUMA with all current full-time staff and part-time staff who work the first and second floor desks is recommended to get all employees on the same page about their work expectations. This meeting would go over how to access and use SUMA as well as explain what the SUMA buttons mean and when they should be

used. This would help combat any confusion in one time and place, as compared to individual meetings with supervisors. Due to any possible scheduling conflicts, it is recommended that this same meeting be offered at later times after the initial one to ensure the opportunity for everyone to attend. To prevent any person missing information, the content of the meeting should be recorded in a video and sent in an email to those who were not able to attend meetings.

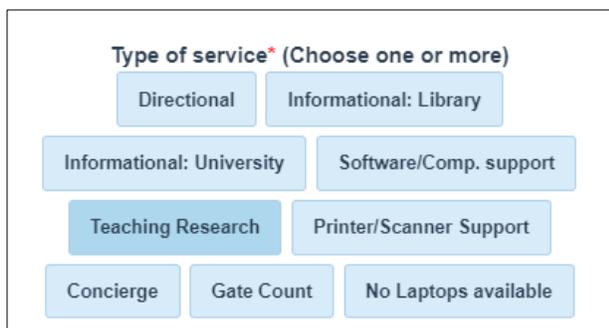
Visual Reminders

Posters around the first and second floor work desk areas that remind workers to log questions into SUMA are also recommended. Based on the online survey given to staff members, half (10/20) said visual, physical cues would help with remembering SUMA. These posters would be simple and direct, yet brightly colored to attract attention. See image to the side for an example. These posters are not too costly and would be placed near the computer to serve as constant, irremovable reminders throughout a shift.



Software Changes

Redesigning the SUMA software in two ways would greatly help with understanding and using SUMA better. One edit is changing the button concierge to the “other” option. The concierge button is there if a patron interaction does not fit any of the other options available.



Changing the wording decreases ambiguity and confusion and instead allows it to be something more familiar. The second option, if possible, is reprogramming SUMA to automatically open on the computer like other necessary library applications at the start of the shift, after initially logging in. This would prevent staff from forgetting about opening SUMA at the start of the shift and be the most direct, visual reminder there can be.

Conclusion

The three proposed solutions are: a team meeting with all staff who work on the desk, a redesigning of SUMA to open automatically once logged on to the computer, and visual reminders around the computer. These solutions were recommended by discussions with other teams in the class as well as the most recurring through research methods. Though it has been mentioned that scheduling conflicts prevent meetings, a formal explanation of SUMA is crucial to ensuring its usage. These three solutions will allow SUMA to not be forgotten and used more accurately. Increasing data accuracy is important in ensuring library operations and providing accurate information to the UT System in the hierarchy of organization. These recommendations were a product of information gathered through all forms of research and peer review from the peers of ENGL 3376.

References

Interview Questions

[Questions for client and designer of SUMA](#) (Tristan and Andy)

[Questions for full-time supervisors of desk employees](#) (Jessica and Margaret and Lainie)

[Interview Responses](#) (audio files & transcript*)

*transcript may have errors due to being rendered through AI technology

Raw Observation Data

[Raw Observation Records](#)

Survey Questions

[Online Form Questions](#)

[Online Form Responses](#)