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Delighting Our Customers: Building Services Collaboratively with Learners at a Distance

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Abstract

The Open University (OU) is the largest academic institution dedicated to distance learning in the United Kingdom, with over 173,000 students. Distance learning students can provide a unique perspective on the experience of the library. As the number of students enrolled in distance education courses continues to grow globally there is an increasing opportunity to work with distance students on service design and development. Engaging with distance students can be challenging, but not impossible. Here we will discuss how The Open University Library has utilised a number of methodologies to work in partnership with its students on service design to the benefit of the service and our students. This paper will provide practical value for any library service with a distance learning community. Specific methodologies of successful distance learner engagement will be presented, along with lessons learnt.

Background

The OU's mission is to be "Open to People, Places, Methods and Ideas," and since the OU's launch in 1969, nearly two million people worldwide have achieved their learning goals by studying with us. The OU teaches through its own unique method of distance learning, called "supported open learning," and it is the largest academic institution in the UK in terms of student numbers. It has:

- Over 170,000 students
- Nearly 6,000 tutors
- More than 1,100 full-time academic staff
- More than 3,500 support staff

Our students are motivated by the need to update their skills, get a qualification, boost their career, change direction, prove themselves, or keep mentally active. People of all ages and backgrounds study with us, for all sorts of reasons. This means that there is no such thing as a typical OU student. Over 75% of OU students work full- or part-time during their studies and the average age of a new undergraduate OU student is 29. In fact, 30% of new OU undergraduates are under 25 and only 9% of our new students are over 50.

The OU Library Service is focused on providing a world-class online library service for students, researchers, tutors and staff. The online library provides students and staff worldwide with access to trusted quality online library resources. A key element of the service is to help students study successfully and increase their employability. This is achieved by supporting students to develop digital and information literacy skills through designing and delivering embedded and targeted skills content and operating a 24/7 virtual helpdesk. We have a key role in supporting teaching at the university but also in supporting and enabling excellent academic research and scholarship.

Culture of student partnership

We have been and indeed still are on a journey of cultural change. Five years ago we were in a common position of designing and delivering services we thought our students wanted, without asking them what they wanted. We made some assumptions, we used our expertise, and we used a little existing data. Often our thinking was "We know what you need to succeed; we know what's best for you," what we have come to refer to as our "eat your greens" mentality.

We recognised that this approach was not working for us. Uptake in our services was not at the level we wanted. We spent a lot of time and energy developing new services only to find they were not what the students wanted or exactly what they needed. We knew the culture needed to shift.

We took a conscious decision to shift to an evidenced-based approach for our service development. All future service developments had to be informed by evidence that the new development or service change was relevant to our students and met their needs. This approach grew and developed

into our current culture of students as partners, based on a continual improvement ethos.

Student partners and collaborators

Our aim is to continually build, develop and improve our service based on the ever-changing needs of our students. Gone are the days where we tell our students what "they need;" instead we work with our students to understand their needs and experiences in order to deliver services and products that are relevant to their study journey and aspiration. It is a continual journey that will never be finished; at least that is our hope.

So, how do we engage with a student community that never comes to our campus?

Our previous biannual surveys had seen decreasing levels of engagement or response, and by 2012 this was down to an 8% response rate. This challenge was not unique to us; there were similar stories across the university. It was becoming increasingly difficult to get students to engage with any form of research activity regardless of format or method. There was one exception: we were successfully using social media to engage with students and have conversations about a range of products and services that were directly impacting our developments; we just were not using it as a channel for formal research projects.

We started to form an idea around the importance of building relationships as part of the engagement process and from there formed a working hypothesis:

If we could find a way to build and develop relationships with students and pre-engage them with the concept of contributing to and driving the development of library services (including why it was important) then they would be more likely to engage with subsequent research activity.

The student panel

We wanted a way to test not only the hypothesis but also a way to work more directly and collaboratively with students. We decided to establish a panel of students, a partnership community. This was a new approach for us and as such we were unsure if it would work in practical terms—from an administrative point of view—or if it would have the impact that we hoped in helping us to engage students. We therefore decided that we would run

the panel initially as a one year pilot (which was subsequently extended to two years).

We worked closely with one of our internal university units, The Institute of Educational Technology (IET), as they at that time coordinated most of the student research work for the university. We knew that they would need to provide initial recruitment samples and track panel involvement in research activities. They were also a key part of working out some of the initial mechanics of managing the panel.

We currently recruit to the panel twice a year. A sample of 4,500 students from across all subject areas and levels of study are invited to join the panel in March and a second sample of a similar size is invited in November. These dates tie in closely with key university student start dates. From these two cohorts each year we recruit a total panel size of around 500 students, which is broadly demographically representative of the larger student body.

Students are asked to be part of the panel for a period of 12 months although they are able to withdraw at any time. During the recruitment process we ask students to let us know if there are any particular research methods (such as focus groups, surveys, usability testing) that they would rather opt out of. This has proved to be an important step in the process. It ensures students have control of the types of activities that they may be asked to take part in, it reduces the "unknowns" for students thinking of joining the panel, and it helps us manage possible student availability for individual pieces of research.

Each student on the panel is able to opt in to a maximum of four research activities within a 12 month period. Each time a new research activity is planned, the panel (or a sample) is contacted (excluding any students that have opted out of a particular method) and the students are asked if they would like to participate. This additional step means that even though they are members of the panel, students will still have the option to take part in activities on a case-by-case basis. Again, this ensures that students have control themselves over their participation in research activities. A lot can change for our students in 12 months or even week by week, so this approach helps students manage their input and not feel overwhelmed by their involvement.

A vital element of the panel is ensuring continued engagement and conversations with students. Our panelists want to understand the impact of the role they are playing. We ensure that the panel receives quarterly updates from us about the research work we are doing and the impact that it is having on how we support students. Those actively involved in the research will receive additional updates or research summaries after each piece of research.

The panel is managed by a small Quality and Insight Team within Library Services but they themselves work closely with other library colleagues who may be running or commissioning the research. A road map of planned research is developed with colleagues and shared with library staff to ensure equity of access to the panel. We do, however, build in capacity for ad-hoc or unplanned work as this can represent a substantial amount of research activity at times.

We do not offer mass scale incentives to students, however those participating in large or complex projects will be offered nominal vouchers (usually Amazon or a suitable alternative for countries where Amazon does not operate). This means that small projects such as surveys or short user experience activities do not receive vouchers or incentives. When students join the panel they receive a small welcome pack that contains information that introduces them to the panel and how it works. The welcome pack also includes a Library Services cotton bag and a library panel branded notebook and pen. Our current phase of panel development includes building an online community space based initially in our virtual learning environment. This will facilitate ongoing discussions, information sharing, and increased peer-to-peer connections. We are also about to trial prototype certificates of participation and downloadable skills portfolios for students to use to evidence the skills they are learning and using whilst working with us on research projects.

Panel impact on engagement

During the evaluation of the pilot in 2014 we analysed two surveys that were similar in terms of project "size." Although not an in-depth analysis of all research undertaken by the panel, it did illustrate some interesting areas that supported our personal reflections on how the panel was performing.

	Survey 1	Survey 2
Sample source[1]	General sample	Student panel
Size of sample	3,000	500
Approximate response rate	8%	80%
Total number of responses	240	400
Estimated cost per response[2]	£1.88	£1.28

The student panel in action

We have worked with students on research activities of varying sizes and intensity including exploring expectations, impact, user experience, product specification, and usability. The following illustrate two very different examples of the student panel in action.

Example 1: Library Search

Like many libraries we knew there was a problem with our online information discovery and students were telling us how unhappy they were. Since the early 2000s we had been using SFX for our journal link resolver and Voyager Library management system for our book records, along with countless other databases. However as electronic information provision has developed, so too have our students' expectations and needs.

We started with a literature search and background research, first focusing on existing user research in libraries about discovery services. We always planned to get students involved but we needed to understand how to frame the business challenge we were facing and, at this stage, we had not conducted much user research so it was also an opportunity to test our perceptions of user expectations. One of the challenges we faced was that other university libraries have greater opportunities for interaction and learning from their students so interaction opportunities needed to be created.

The first round of usability interviews (18 people) was used to compare existing search tools (Primo, Summon, an EDS discovery tool, Google Scholar, and an internally-developed search portal). This was done remotely using a tool called TeamViewer[3] that allowed us to watch student screen actions and talk to them in real time. TeamViewer is technically a support screen-sharing tool, but it has built-in recording and shares screens automatically without having to prompt users. It is very easy for students and facilitators. Students were asked to "think aloud" and to verbalise their thinking as they moved around the interfaces. In hindsight, we should have asked the students to look at two versions of each search tool type to avoid influence of how institutions had configured and implemented the tools. We measured the time taken to complete the different activities, as well as the success rate. This helped get a picture to compare EDS, Summon, and Primo in a quantitative way as well as qualitative and informed the tendering criteria in terms of what was essential and less important.

To test our understanding and analysis from the first round of interviews, wireframes of search interfaces were developed using an online tool called Balsamiq.[4] These were converted to "screenshots" that could be used for first click testing (using Chalkmark[5] from a suite of online interactive testing tools from Optimal Workshop) with students using the same search tasks from the first round. Online wireframe testing was new to us at this stage, however it worked incredibly well and we have used it regularly since this initial project. Our next step was to build a concept interface to sit over the top of our internal search tool so that we could test key findings and required functionality (as best we could recreate without rebuilding a full search tool). This working prototype was then tested again online using the same activity approach. One of the advantages of doing this remotely was that students were not aware they were being timed so their natural behaviour was not influenced.

All testing was remote, but staff were invited to come along to a separate observation room and watch the testing. This helped with staff engagement in terms of accepting the findings and the role of working more closely with students. The approach we took used one facilitator plus a note taker, which proved much easier than one person fulfilling both roles. We decided not to have librarians facilitating the testing as we had found that it was difficult for them to resist the urge to teach during the sessions. We found there

was also reduced unconscious bias if the people involved in the research were not aligned to the area being evaluated.

Working closely with students to understand genuine needs and realistic approaches to search activities ensured we were able to define robust user requirements for the tendering process. We were also able to produce well-defined technical requirements for the technical specification and then to refine developments at the implementation stage. The impact of the approach also led to a strategy of incremental change for the library search tool with a new interface design rolled out along with changes to terminology.

Example 2: Impact of Library Services
We have implemented an annual programme of 1:1 student interviews to explore the role the library has played in their studies. This initially stemmed from a desire to be able to articulate the impact the OU Library was having on students and their study experience, to understand how students perceive the OU Library, and how students would like to see things improve. Each year we interview 10–12 students by telephone. There are clear objectives for the interviews but a key part of the approach is that there are a very small number of pre-scripted questions. Staff conducting the interviews are able to follow conversations in an organic way within three broad areas defined by the objectives:
1. Expectations of the library at the start of their studies
2. Role of library during their studies
3. What use (or non-use) was made of the library

This flexibility has meant interviewers have been able to take the time to genuinely explore student areas of concern, suggestions and understand the realities of using library services.

The interviews are transcribed and analysed with key themes across the research being pulled out. An overview report is compiled looking at the key themes for this year whilst also looking at the previous years' themes. The findings are then also grouped and shared with specific service owners for them to enact any necessary changes or further investigations. We also synthesise each of the interviews into an anonymised one-page case study that staff can use with colleagues across the university to demonstrate library use or as an advocacy or influencing tool. For example, our

academic liaison librarians have used the case studies during discussions with faculty colleagues to highlight the positive impact of including integrated library content and embedded skills development activities within student learning materials and courses. The findings from the interviews also add to our holistic evidence base.

These annual interviews have led to a number of new developments or changes to services already in place. They have also provided valuable evidence to influence wider university decisions or initiatives. These have included students suggesting the top three areas to share with other students to be included in a new undergraduate student video, working with the university to improve the student induction, introducing new initiatives to increase the visibility of the OU Library, and making changes to the library website to improve navigation. The importance of this insight and evidence should not be underestimated. For a number of years Library Services has been working to influence a change in the universal university student website header, so that a link to Library Services was included. Genuine evidence from students supporting the need for increased visibility helped us build a much stronger case with the university to implement our proposed change to the header. We were able to use the data and evidence we had and this change has now been implemented. We were also able to highlight this to students as part of the research and communication loop.

Conclusions

We have found that, to date, the way we have developed and worked with the student panel has greatly improved student engagement and collaboration. The engagement is above the level we had hoped for or anticipated (although we were starting from a low 8% survey response rate) and, whilst other parts of the university may find it difficult to get students to engage, our experience is very different.

Our major learning point is that communication is key. Having the conversations and keeping students in the loop about the research is one of the most import elements of the panel. Without this there is not any additional engagement with students above other research activities and it is this engagement that keeps students involved and interested. We make sure we give feedback at the end of the piece of research and every quarter we e-mail the whole

panel with a summary of the quarter's research. This includes what we have looked at, what students said, and what we are doing as a result. Students have told us that they like to see their contribution having an impact. So we ensure that we actually do make decisions, implement changes, or build new services as a result. We do not let our learning slip away or the student voice fade into history. It is hard but we have tried to ensure that we take action and then we make sure we highlight that impact to students and staff. There is still room for improvement, and certainly we could have a faster pace of change or implementation. Anecdotally we have heard that our approach is changing student perceptions and increasing their trust in us to really listen and respond to the student voice.

Greater collaboration with students has led to us having more opportunities to listen. The panelists are talking to us about things beyond the areas we start to research with them so we are not the only ones instigating conversations. Students are guiding new conversations, too, and this has been both empowering and liberating. We are certainly gaining a much better understanding of student needs and frustrations through working with students (we definitely make fewer assumptions!), and the panel provides a very effective vehicle for this research. The panel and our closer relationship with students has forced our cultural change to happen at a faster pace so that we are more transparent now, and this is feeding the cycle of engagement with students on the panel seeing and acknowledging that we take what they say seriously.

One of the largest benefits is our visibility and influence. For example, students directly articulating how important it is for library induction to be included at the early stages of qualifications rather than later has had more influence with colleagues in other units than us expressing the same sentiment. Being able to tell the rest of the university the diverse and compelling stories of where our library service has supported or improved a student experience in their words has helped us articulate the benefits of the service.

We have also learned that incentives are not the only driver for engagement. Students often wanted recognition and to see changes more than they wanted to receive an incentive. For Library Services, recognition comes in the form of our commitment to sharing our findings in a transparent way and

showcasing students as partners and collaborators, in supporting students to build individual skills portfolios and awarding certificates of participation. Our cultural change has been key to demonstrating that we are making decisions and taking the action needed for students to see that changes do take place.

Our work has had wider impact than we expected with the university identifying the student panel as an area of good practice, increasing interest in student engagement and user experience activity across the university, whilst at the same time showcasing Library Services.

We have, however, had to learn to be brave and to be open. Essentially the research we conduct or the work we complete with the student panel is focussed on supporting our decision making. To be true to that, we learned that we would hear things we did not like or in some cases disagreed with, but we still had to listen. However, that openness and willingness to hear accurate and genuine feedback, to garner real insight and to act on that insight, is what is helping us deliver better services to our students.

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Endnotes

1. Survey 1 used a general sample from the entire OU student population and Survey 2 used the student panel.

2. The estimated cost is based on staff time only (15 hours of staff time for general survey, 17 hours of staff time for the panel survey). No financial incentives were offered to students.

3. TeamViewer, https://www.teamviewer.com/en/.

4. Balsamiq, https://balsamiq.com/.

5. "Chalkmark," Optimal Workshop, https://www.optimalworkshop.com/chalkmark.