

Final Report of the HathiTrust User Engagement Task Force (UETF)

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User Engagement Task Force Summary

In 2019 the HathiTrust Program Steering Committee (PSC) put out a call for four task forces and working groups to support specific objectives set forth in HathiTrust's Strategic Directions 2019-2023. The full charge for the User Engagement Task Force can be found at <https://www.hathitrust.org/charge-user-engagement-task-force> and in Appendix A on page 28.

The User Engagement Task Force considered ways that HathiTrust can better understand its users' needs; considered issues related to users' engagement with HathiTrust collections and services; and made recommendations for supporting member libraries in engaging users. These recommendations can be found under "Suggested Recommendations for Moving Forward".

On average, the group met once or twice a month, with breaks due to the pandemic and while gathering data for the survey. The task force began by gathering information about the current state of HathiTrust's user engagement. It reviewed existing data, engagement techniques, and sources of user feedback. Representatives met with the Metadata Strategy Task force, and solicited input from the staff of HathiTrust (key members of which were on the task force). The task force also conducted a literature review of similar organizations' attempts to gather user feedback, as well as general user experience research design.

The task force determined that a survey would be valuable to meeting its charge. When the task force presented at the HathiTrust Business Meeting and conducted a HathiTrust Community Week member event it used activities, polls, and break-out sessions to refine the areas of focus for our survey based on input from these key stakeholders.

Using these foundations, the task force identified the front-line library staff at member institutions that deliver HathiTrust as being the key intermediaries with users. These intermediaries also were underrepresented in the sources of data that were already available.

After several iterations to (and consultation with PSC), a survey was sent out to all 180+ HathiTrust Member Representatives (with instructions to forward on to others in their organizations as needed) on April 30, 2020 with a deadline of June 23. Our recommendations based on the results of all of these data efforts start on page 23.

Members of the task force were:

Christopher Cox, Clemson University, Chair
Renata Ewing, California Digital Library
Peter Fernandez, University of Tennessee, Knoxville
Kiana Jones, University of Pittsburgh
Megan Macken, Oklahoma State University
Ashley Maynor, New York University
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Angelina Zaytsev, HathiTrust

Current State of HathiTrust User Engagement

Communications and Outreach

Primary Target Audience: Member librarians, specifically Member Representatives and those identified as being a primary contact for their library. This includes a range of functional roles and disciplines, e.g. User Services, Collections, Liaison. Each member library has at least 1 contact. Most have 2-5+. The entire contact database for HathiTrust has 1,500 individuals from member libraries.

Communications Channels: Monthly newsletter; targeted emails; informational website; Twitter; Slack Member Channel; webinars hosted by HathiTrust (HathiTrust 101); webinars hosted by members; annual member meeting.

Email Open Rates: Range from 30-50%. This is approximately 20 percentage points higher than the industry (Non-profit) average. Targeted emails have higher open rates than monthly newsletters. The range for click-thrus on emails, however, is usually lower than 10%. The industry average is 19.5%.

Understanding End Users

Usage Data: HathiTrust uses Google Analytics and some limited application logs to track usage of the digital library. Access to Google Analytics is provided to members upon request, but we've exceeded data collections limits for the free Google Analytics product.

User Support: Support and communication with end users and members occurs primarily through HathiTrust User Support, a cooperative member-staffed team. HathiTrust receives approximately 5,000 requests per year.

User Research: In the last couple of years, HathiTrust staff have undertaken user research projects to understand the needs and pain points of patrons using the digital library. This research has driven improvements to the digital library and our services.

Literature Review & Environmental Scan

A literature review was conducted to explore how organizations like HathiTrust engage with their members. Three key themes were pulled from the data that could help improve HT engagement:

1. Understand your membership makeup
2. Develop an engagement strategy that:
 - changes course when needed
 - utilizes various engagement and communication tools
 - uses metrics that matches organizational needs
3. There is no one-size fits all engagement strategy.

Non-Librarianship Journals

Kristoffersen, Line, and Sangeeta Singh. "Successful Application of a Customer Relationship Management Program in a Nonprofit Organization." *Journal of Marketing Theory & Practice* 12, no. 2 (Spring 2004): 28–42 <https://doi.org/10.1080/10696679.2004.11658517>.

The authors discuss the role of a customer relationship management (CRM) program which emphasizes how customer satisfaction builds loyalty overtime. The key element of the CRM program is to design a plan that focuses on understanding customer needs and expectations.

Marl, Dan, Richie, William J., and Scott W. Geiger. "Strategic group membership and nonprofit organization performance" *Nonprofit Management & Leadership* 20, no 1(September 2009): 23-39

Marlin, et al, discusses why implementing a strategic group model can help organizations better themselves within their industry. Industry specific strategic group modelling could be used as benchmarking tool.

Swanson, Lee A. "A Strategic Engagement Framework for Nonprofits." *Nonprofit Management & Leadership* 23, no. 3 (Spring 2013): 303–23. <https://doi.org/10.1002/nml.21067>.

Lee explores the role of the Strategic Engagement Framework which asks non-profits to focus on their social capital. By implementing the framework, organizations can have higher levels of stakeholder engagement through aligning their social capital with institutional priorities. One example of this could be through developing a solid brand identity with stakeholders.

Librarianship Journals

Kim, Jong-Ae (2015) "Integrating Communities of Practice into Library Services," *Collaborative Librarianship*: Vol. 7 : Iss. 2 , Article

2. <https://digitalcommons.du.edu/collaborativelibrarianship/vol7/iss2/2>

The author recommends the formation of Communities of Practice to share knowledge and foster communication between groups and collectives.

Mason Smith, Maggie; Serrao, Jessica L.; Klar, C. Lili; McEntire, DeAnna; Grant, Anne; and Israel, Gabriel (2020) "Best Practices for the Collection of Feedback from Campus Constituents Utilizing Campus and Community Partners," *Collaborative Librarianship*: Vol. 11 : Iss. 4 , Article

3. <https://digitalcommons.du.edu/cgi/viewcontent.cgi?article=1443&context=collaborativelibrarianship>

Clemson University organized a Feedback Task Force to collect feedback from their campus community. The Task Force developed a marketing Campaign with a catchy slogan, '14 days to Have your Say' that was pushed out online and face to face. The authors noted the important role social media and students played in making this campaign a success.

Samberg, Rachael and Taylor, Anneliese (2020) "What Collaboration Means to Us: Sharing Stories to Drive Open Scholarship," *Collaborative Librarianship*: Vol. 11 : Iss. 4 , Article 2.

<https://digitalcommons.du.edu/collaborativelibrarianship/vol11/iss4/2>

The authors stress how using storytelling as a method to push out communication can build collaboration in collectives.

Hardy, Martha E. (2013) "Review of Connect, Collaborate, and Communicate: A Report from the Value of Academic Libraries Summits," *Collaborative Librarianship*: Vol. 5 : Iss. 3 , Article

10. <https://digitalcommons.du.edu/collaborativelibrarianship/vol5/iss3/10>

Hardy explores how important it is to communicate the value libraries play in student success and learning. Partnership and collaboration were also emphasized as important elements in academic library achievement.

Lee, Matt, and Horton, Valerie (2016) "Communication in Library Consortia," *Collaborative Librarianship*: Vol 7: Iss. 1, Article

3. <https://digitalcommons.du.edu/collaborativelibrarianship/vol7/iss1/3/>

Lee and Horton studied the various stakeholder communication tools used at ten different consortia. A theme across the study was each consortia experienced communication difficulties. Organizations that designed nimble communication strategies and could easily change course when a method was not working, had more success.

Other communication successes included the use of various communication tools and techniques. Finally, there was an emphasis on a no one size fits all strategy.

Environmental Scan

Below is a list of organizations and library consortia that are like HathiTrust. If needed, individual consultation with each group could provide more information on specific or unique engagement strategies.

Organizations

Inter-university Consortium for Political and Social

Research - <https://www.icpsr.umich.edu/web/pages/>

An international consortium of more than 750 academic institutions and research organizations, Inter-university Consortium for Political and Social Research (ICPSR) provides leadership and training in data access, curation, and methods of analysis for the social science research community. ICPSR, a unit of Institute for Social Research at University of Michigan.

Digital Public Library of America - <https://dp.la/>

DPLA makes millions of materials from libraries, archives, museums, and other cultural institutions across the country available to all in a one-stop discovery experience.

It provides a library-controlled marketplace and platform for libraries to purchase, organize, and deliver ebooks and other e-content to their patrons. Library leaders and practitioners explore and advance technologies that serve, inform, and empower their communities.

Educopia - <https://educopia.org/about/>

Educopia facilitates a number of community-led information based cooperatives/consortia though each operates independently.

Metaarchive - <https://metaarchive.org/>

Metaarchive uses member profiles for showcase testimonials of value. Notably, they have a robust section serving the technical users of the digital preservation service. <https://metaarchive.org/how-ddp-works/>

Community Roundtable - <https://communityroundtable.com/>

CR provides resources for community management professionals, backed by the industry's most comprehensive and trusted research, [The State of Community Management](#).

Library Consortia

Amigos Library Services is one of the largest consortia of libraries in the United States, providing continuing education, discounted services from leading vendors, courier service, association management, and more. <https://www.amigos.org/>

CMLE is the Central Minnesota Libraries Exchange, one of seven regional multi-type library systems in Minnesota. <http://www.cmle.org/>

CLIC is the Cooperating Libraries in Consortium a consortium of eight private academic libraries in Minnesota. <http://cllc.edu/>

CRL is the Center for Research Libraries, an international consortium of university, college, and independent research libraries. Founded in 1949, CRL supports original research and inspired teaching in the humanities, sciences, and social sciences by preserving and making available to scholars a wealth of rare and uncommon primary source materials from all world regions. <https://www.crl.edu/>

Marmot Library Network is a consortium of over thirty libraries from Western Colorado. <http://www.marmot.org/>

Metronet serves all types of libraries in the seven-county Twin Cities area of Minnesota. <http://www.metrolibraries.net/librarywire/overview.html>

MCLS is the Midwest Collaborative for Library Services which serves primarily Michigan and Indiana, but also has nationwide services. <https://mcls.org/>

MELSA is the Metropolitan Library Service Agency an alliance of over 100 public libraries in the seven-county Twin Cities area of Minnesota. <http://www.melsa.org/melsa/>

Minitex is a multi-type consortium that serves over 900 libraries in Minnesota, North Dakota, and South Dakota. Minitex does provide some nationwide service. <https://www.minitex.umn.edu/>

OCLC is a global library service consortium. <https://oclc.org/>

OCUL - Ontario Council of University Libraries, consortia of the 21 academic libraries in Ontario (Canada) <https://ocul.on.ca/>

SELCO is the Southeastern Libraries Cooperating, a public library regional system, and SELS, Southeast Library System, a multitype regional system, which support 11 counties in southeastern Minnesota. <http://www.selco.info/>

TBLC is the Tampa Bay Library Consortium, a multi-type Library Cooperative representing over 120 libraries in Florida. <http://tblc.org/>

The Alliance is the common name for the Colorado Alliance of Research Libraries, representing thirteen major libraries located in Colorado and Wyoming. <https://www.coalliance.org/>

WiLS is formerly the Wisconsin Library Services and provides services to multi-type libraries, including some national services. <http://www.wils.org/>

Presentation and Activity for HathiTrust Community Week

Community Week Session Context and Intended Outcomes

The User Engagement Task Force delivered a Zoom session for HathiTrust Community Week on Monday, October 26, 2020 titled “Choose Your Own Adventure: Tell Us What You Know About HathiTrust.” The Task Force saw the session as an opportunity to gather first-hand qualitative data to inform a survey of HathiTrust members, planned for after Community Week. In particular, we wanted to learn about participants’ personal experiences and reflections about HathiTrust and HathiTrust related outreach activities that exist at member libraries.

In addition, the Task Force had these desired outcomes for participants:

- Establish and strengthen connections among HathiTrust members
- Be inspired to perform HathiTrust outreach
- Identify shared solutions to engagement and outreach challenges
- Learn more about HathiTrust overall

HathiTrust’s Community Week was geared towards individuals with an interest in or responsibility for HathiTrust at their own institutions, but who may have never attended a member meeting and/or whose institution had only recently joined HathiTrust in order to benefit from ETAS. The “Choose Your Own Adventure” session was structured with this mix in mind, and included 4 poll questions and 2 breakout rooms in which 6 questions were suggested for discussion. 77 people registered in advance to attend the session, representing 52 institutions, 10 of which had joined HathiTrust in 2020. Turnout was good, though not all 77 registrants attended. Additionally, the 9 members of the User Engagement Task Force were present. From 21-38 participants responded to each poll, some of whom may have been members of the User Engagement Task Force.

Poll and Breakout Discussion Findings

Results of the polls and notes from the discussion questions suggest that:

- **Overall Positive View of HathiTrust**
The results of the polls and discussions included a mix of praise for, and frustrations with, HathiTrust. Poll #1 (What are three words you would use to describe HathiTrust?) got 38 responses, the most of all the polls. In the resulting word cloud, positive traits such as “useful”; “collaborative”; “open”; “access”; “amazing”; and “lifesaver”, have the greatest emphasis, and overall there are more words that denote positive qualities (25)

User Interface	2
Total	42

- *Frustrations with Search*

The most frequently reported area of frustration reported is related to search, search results, and/or the search interface (8 responses). However, when given the opportunity to provide specific feedback on the search interface in the breakout room discussion, only a few responses were recorded.
- *Confusion about characterizing HathiTrust*

The next most frequently reported area of frustration is a general confusion about what HathiTrust is, how to use it, and/or what's in the repository (7 responses). Example responses include: "It takes a long time to understand how it works"; "...how do you explain concisely what it is good for?"; and "Understanding what's in, what's out and why." This frustration (the lack of understanding of what HathiTrust is, what's in it, and/or what it's good for) also surfaced and was recorded in breakout room discussions. Examples: "It is really overwhelming to figure out what it is and how to fit it in" and "people are frustrated about what they're searching, not sure what the scope and comprehensiveness of the collection is in HT. What percentage of X is in HT?"
- *Participants' sense of overwhelm*

Eight descriptors that indicate the large size of HathiTrust, including "vast"; "enormous"; "extensive"; "supersized"; and "massive" appeared in the word cloud. Taken on their own, these words may not indicate either a positive or negative view of HathiTrust. But in the context of the confusion expressed in Poll #3 and the breakout rooms about what exactly HathiTrust is and what it contains, these words may emphasize the sense of overwhelm that some participants experience when using HathiTrust.
- **Prominence of ETAS**

The results of Poll #2, asking participants to rank their favorite HathiTrust services, shows that ETAS was at the top of everyone's mind. 30 participants responded and ETAS was shown to be the clear favorite of HathiTrust services with twice as many votes as any other service. Copyright review, the Accessible Text Request Service, and the HathiTrust Research Center were roughly equally popular in following ETAS as a favorite service, and the Shared Print Program came in 5th place. In addition, some of the terms participants used to describe HathiTrust in Poll #1, such as "lifesaver"; "visionary"; "exclusive"; and "limiting" may be related to ETAS access in particular, and the word "ETAS" appears frequently in the notes taken during the breakout discussions.
- **Lack of knowledge of HathiTrust services beyond ETAS**

Poll #4 (What, if anything, did you learn from this session?) had only 21 responses, the most common of which was learning that HathiTrust provided services beyond ETAS (8 responses). These responses point to the success of the webinar itself to educate HathiTrust partner participants about HathiTrust services. They also suggest that HathiTrust could and should do more to make sure that information about its services are reaching librarians at partner libraries.

- **Listening and learning from each other**

Five responses to poll #4 focused on what participants heard from or learned about other HathiTrust members, examples include “I am grateful for the chance to hear perspectives from around the country to fill out mine”; “Frustrations are shared by others”; “I learned that we can learn a lot from each others experiences with and understanding of HathiTrust”; and “Others are learning too”. Four responses expressed appreciation to HathiTrust for being open to hearing feedback: “HathiTrust is very open to honest feedback and to building a stronger community”; “That you are aware of some of the barriers and want to do something about it.”; and “That you care!”. There were also two endorsements of the session itself “Breakout groups were great!” and “The collaborative atmosphere on the zoom session was PHENOMENAL!”. These responses suggest that participants appreciated the chance to interact, listen, and learn from each other and from those representing HathiTrust. It also points to the success of the session format for using Zoom.

Analysis and Recommendations

When analyzing the results of the polls and discussion questions, it’s important to remember that the session took place during a worldwide pandemic when many, but not all, HathiTrust member libraries and institutions were still physically closed. Many were actively using the Emergency Temporary Access Service (ETAS) or had used the service for a number of months. ETAS put HathiTrust front and center at many member libraries in a way it had never been in the past; indeed many HathiTrust members may have joined during the pandemic for the purpose of gaining access to ETAS.¹ ETAS created excitement about HathiTrust in general, but it’s likely that common frustrations with ETAS - issues such as the inability to download PDF’s of ETAS volumes or to easily authenticate - influenced the results.

Overall, those who participated in the session had a positive view of HathiTrust and particularly of ETAS. However, they also expressed some serious frustrations and associated negative qualities with HathiTrust. Some of these concerns are complex system issues and could require significant resources to address (search issues, slow page loading, low quality metadata, and user interface issues); other concerns (closed volumes, inability to download ETAS volumes, and no snippets) could require revised interpretations of copyright law or a change to copyright law itself, which of course is outside of HathiTrust’s ability. However, finding more successful ways

¹ 32 institutions joined HathiTrust between May and October of 2020, shortly after ETAS launched; by comparison, 7 institutions became members during the same period in 2019, and 12 in 2018.

to explain what HathiTrust is, what its vast collection encompasses, and why the majority of volumes are restricted may be the low hanging fruit revealed through this session.

The results of the session suggest that HathiTrust may want to do the following things to improve the user experience for its member constituencies:

- Provide a simple, user friendly explanation for what HathiTrust is, what it does, and why more than half its repository is not available for reading access.
- Explain the parameters, strengths, and limitations of its collection concisely and clearly so that its large size is perceived as a benefit rather than as a source of overwhelm or confusion.
- Explore issues reported about the search interface and search results and address these where possible to bring HathiTrust digital library services more in line with user expectations and needs.
- Do outreach about HathiTrust's services so members are aware of their benefits and potential.
- Create ways for members to communicate with each other and to express both their positive experiences and their frustrations to HathiTrust. Perhaps hosting a session like this, encouraging member input on their impressions of and experience with HathiTrust, could be an annual opportunity to take the pulse of member library staff.

Survey to HathiTrust Members

Target Audience

The UETF charge includes an objective to “engage HathiTrust member libraries to understand how well informed librarians are about HathiTrust services, collections, and programs and how they could be better supported in communicating with and supporting HathiTrust end users.” Outcomes from the survey are intended to inform another objective to “advise PSC and the HathiTrust staff on issues related to users’ engagement with HathiTrust collections and services; and make recommendations to improve HathiTrust support for member libraries in engaging users.” From this, we discerned that the primary focus of our inquiry would be those librarians and library professionals who work directly with end users.

Because HathiTrust does not have comprehensive contact information for people in these specific roles at its member institutions, we needed to work through our existing Member Representative contacts. We distributed the survey to these individuals and asked them to identify the people in their member library responsible for reference, instruction, liaison work, outreach, or user services and to forward our survey along to them. We permitted more than one person from an institution to complete the survey.

Note: The committee defined the scope of its effort to exclude assessment of the User Experience of the HathiTrust Digital Library interface. It also elected to focus on the “end user” as that of a library patron engaging HathiTrust Digital Library for scholarly work vs. an “end user” as a member librarian engaging with HathiTrust in a professional capacity.

Survey Type

We developed a 10-question survey in Qualtrics to assess the current state of awareness among HathiTrust member librarians. We sought to measure general awareness and effectiveness of HathiTrust services and programs, as well as current HathiTrust outreach activity. Additionally, we sought to learn more about Member Library outreach activities related to HathiTrust. Finally, we sought out individual recommendations for additional types of support or materials that HathiTrust could provide. We used a combination of quantitative and qualitative questions.

Distribution and Response

We sent the initial User Engagement Task Force survey invitation via email to 189 Member Representatives from each member library of HathiTrust. The 57.7% open rate was 20 percentage points higher than our average open rate suggesting that people were more

interested in the content than usual communications from HathiTrust. A PDF option was also available to meet the needs of various individuals and libraries.

The survey was open from April 29 through June 23, 2021, and closed with a 29% response rate. Fifty-eight institutions and 175 individuals responded to the survey, representing a range of Tier 1, 2, and 3 institutions, as well as state systems. A majority of respondents — 53% — identified themselves as “Reference or Instructional Librarians,” which was the survey’s target audience. Other identified roles include Access Services/ILL; Collection Development; Special Collections/Archives; Administration; and Digital Scholarship. The committee applauds Member Representatives for cascading the survey to appropriate individuals within their libraries. The libraries with the greatest number of respondents were the University of Michigan with 22 total responses; Princeton University with 12 and the University of California state system with 9. Nineteen of the 58 member library respondents recorded a single response while the remaining had 2-5 individuals responding from their institution.

You can view the full results/responses from the survey at <https://docs.google.com/presentation/d/1WGMme1gOxwY1EibNNKlwBm72iuYJySjd/edit?usp=sharing&oid=117623637786113016985&rtpof=true&sd=true>.

Summary of Results

Awareness (Q7,10) / Individual Experience (Q4-5)

Several questions addressed respondents’ familiarity with HathiTrust programs, services, and features as well as their individual experience using the system.

The greatest number of respondents are aware of HathiTrust Digital Library (HTDL)(124) and the Emergency Temporary Access Service (130). They also use these two services the most (91, 88) and refer them most frequently to patrons (99, 96) [Q10]. Respondents were also generally aware of the Download of Public Domain Titles in HTDL feature (98), the User Support/Feedback service (82), and the HathiTrust Research Center (74). [Q10]

Most respondents provide patrons with links to (68 or 39%) or personally read content (58 or 33%) in HathiTrust Digital Library once per month. Around 30% (53) of respondents shared HTDL with their library patrons once per week.

Respondents are least aware (157 or 90%) of the HathiTrust Community Slack Channel and most aware (78 or 45%) of the HathiTrust newsletter. [Q7] Only 37% (64) are aware of the HathiTrust 101 Webinars. Less than a quarter of respondents know about HathiTrust Community Week (25 or 14%), the HathiTrust Member Toolkit (34 or 20%), and the HathiTrust Twitter feed (42 or 24%) [Q7].

Member Library Outreach Activity (Q6)

This question specified 11 different channels for outreach communication initiated by member libraries to their users about HathiTrust services or programs. Respondents had the option to pick all that applied. “In what ways does your library promote HathiTrust to your patrons?”

Respondents typically promote HathiTrust to their patrons via Catalog Links or Discovery Systems (131 or 21%); Reference Interviews (124 or 20%); or LibGuides (96 or 15%). Twitter, Facebook, and Instagram received the lowest rank for promotional paths - respectively 17 or 3%; 10 or 2%; 8 or 1%. Only one respondent indicated use of “Liaison Outreach” as a path, while five people indicated promotion of HathiTrust through inclusion in a “database list.”

Two of the categories could have been easily conflated — “Library or Institutional Blog Post” and “Library or Institutional Newsletter/Outlet.” Combined, these categories are a larger platform than LibGuides (101 or 16%).

HathiTrust Outreach Activity (Q8, Q9, Q11, Q13)

The majority of respondents rated HathiTrust Newsletters and 101 Webinars as very effective or moderately effective communication channels. There were no channels that stood out as extremely effective or clearly ineffective. [Q8] Likewise, respondents most prefer the HathiTrust Newsletter (64 or 37%), or their own institution's channels (meeting, webinar, blog post, newsletter, LibGuide, 64 or 37%) for learning about HathiTrust programs and services. HathiTrust Webinar or online tutorial followed as the most popular second or third choice (97 or 46%) [QW11].

Instructional videos (127 or 26%) were the most requested services, followed by online user documentation (110 or 23%) and discipline-specific support or marketing materials (96 or 20%). Other responses indicated that brief videos would be helpful [Q9]:

- Announcements/Highlights about specific content that could be distributed to specific disciplines, topical content, or popular content
- “any videos should be brief and narrowly focused, searchable with 'recommendations' for related content. If they can be made available by results from 'help' search results as well as a training/tutorial page that would be fantastic.”
- “short videos to share w student research and teaching faculty 3-6 minutes”
- “scripts for support/production/patron-facing units”

Open-Ended Question (Q13): How could HathiTrust better support you in communicating with and assisting your patrons?

Of the 70 responses to this question, several reflected needs outside the scope of this group including requests for access to all items in the collection regardless of copyright status and specific improvements to the user interface. The majority of the other responses fall into three categories:

Instructional Materials

The materials mentioned include more informational emails, video tutorials, LibGuides, reference scripts, training sessions, and targeted information for faculty and students.

Creat[e] better documentation on how to search the Hathi Trust

Make it clearer what our users do and don't have access to and briefly (in terms they understand) explain why.

It would be great to have short tutorials on government documents and general user navigation that are user focused on YouTube. Now, it looks like most of the YouTube videos are for librarians or advertisements. It would also be nice to have user-focused tutorials and back-end library tutorials differentiated via playlists.

Perhaps some tools/guides/tutorials of basics that could be included on LibGuides? HathiTrust is great for primary sources, but it's not the easiest to search (especially for undergrads) and there usually isn't a ton of time to walk through it in an info lit one-shot, for example.

Collections Information

Discipline- or theme-focused materials that highlight the richness of the HathiTrust holdings as a resource for particular constituencies for their teaching & research

Email templates for disciplines Ex - What HathiTrust has to offer for chemistry faculty and students?

Produce more useful holdings lists that are ordered chronologically; clean up discrepancies in holdings for titles where one library's contributed scans are full text view for some items (post-1925) while other nearby years aren't open (I know that's a big ask)

Better understanding of some of the collections that are included in HathiTrust, as opposed to individual titles. For example, historical magazines, government documents, etc.

Ways to Connect

More obvious contact info on site

Thanks for asking. Not sure - it seems you offer a lot already. I'm assuming you come to library conferences: ALA, ACRL, etc.? You may wish to reach out to subject library organizations, like the Art Libraries Society, Music Librarians Association, etc., and schedule a group session to pass on information.

Add a help button on the platform.

The information that you are sending to our library is not getting disseminated to front line workers as much as it could be. Not sure how you can impact that.

The final open-ended question — “Is there anything else you’d like to tell us?” — produced responses related to usage, communication, and tutorials/videos/webinars, as well as two topics out of scope for the UETF, ETAs/full text/downloads, and User Experience. Several key points are included here:

Communication

- A respondent reported a problem (page missing) and would like to know the resolution.
- Another wants to know how to get involved with HathiTrust working groups.

Tutorials/Videos/Webinars

- One respondent struggled to share HTDL with patrons, but the survey increased the librarian’s awareness of support options.
- “Short, focused videos 3-6 mins are the best option for students and teaching faculty stressed out by COVID as most of our history classes will be hybrid or digital. They can't process longer videos.”
- “More recorded lessons like HTRC to point students to”

Individual Experiences

- “I'd rather you focus on improving the interface than doing marketing. The books load slowly and are not optimized to screen size. Would love to be able to download them, too.”
- “More resources to explain the process or advertise the service is much less useful than working on improving the actual patron experience. the best way to help me help my patrons is to reduce the number of steps between locating an item and reading the material.”

Survey Takeaways/Analysis/Recommendations

- Continue delivering the newsletter and 101 webinars.
- Consider additional ways to provide brief instructional videos and online documentation/tutorials.
- Based on positive feedback from Community Week, but lack of awareness about it (according to this survey), promote Community Week more.
- Further inquiry/test waters with discipline-specific materials.
- Potentially build in a banner to the HTDL asking site visitors if they would like to sign up for the newsletter.
- Explore user interest and feasibility of chat support service on website.
- Perhaps include a portion of the newsletter that highlights avenues of support and volunteer opportunities and community week. [does this already happen?]
- Identify and work with liaisons creating/delivering HathiTrust support locally at member institutions.
- Librarians share HathiTrust content once per month to once per week. How does this compare with past surveys/metrics? How are users being referred to the site -- from google search? From libguides, if libguides, find out what's working for those libguides/libraries/librarians.
- Explore options for promoting the following programs, services or features that more than half of respondents were not aware of [Q10]:
 - Accessible Text Request Service (105)
 - Shared Print Program (117)
 - U.S. Federal Documents Program (121)
 - Copyright Review Program (127)
 - ETAS log data usage reports (136)
 - Collection Builder tool in HTDL (141)
 - Creative Commons Declaration Form (CCDF, 142)aq
 - Access to Google Analytics (146)
- Because social media content (57 or 12%) and marketing materials (47 or 10%) were less useful, and printed marketing materials (17 or 4%) or printed user documentation (8 or 2%) received the lowest ratings, consider allocating less labor to these areas. [Q9]
- Future project: Cross-referencing data with other existing data
 - For example, are there trends based on institution size? Job Description, etc
- Future question: more about libraries' own promotion or what they'd like to do
 - Respondents want to get info from their own libraries about HathiTrust (Q11 relates to Q6)
- Find out who the "super users" are (every day, etc) -- was this just for ETAS??
- Questions that may need to be revisited (Q8,Q12)
- Deeper survey information, eg measure general awareness of in relation to amount of usage or promotion within their library
- Didn't ask specifically about the HathiTrust Website as a communication channel

- Based on the audience surveyed, the value of HathiTrust is relative to the ability of their users to understand what HathiTrust has to offer and how to access it. Delivering value to this audience means helping them help their users.

User Engagement Task Force: Suggested Recommendations Going Forward

The User Engagement Task Force (UETF) worked on three significant initiatives - a literature review to explore how organizations like HathiTrust engage with their members; a presentation for HathiTrust's 2020 Community Week; and a survey focused on gathering information from library personnel at HathiTrust member institutions. Below is a summary of the findings and recommendations from these three initiatives, categorized into four areas: communications, community building, systems improvements and research. Each area is further broken down into what HathiTrust should keep doing, what it should do more of, what it should do less of and what it should try doing. To start, a summary of general principles learned from the Literature Review is included which may potentially be applied to projects in the four areas.

General Principles from Literature Review

HathiTrust may want to incorporate (and/or continue to incorporate) these principles from the literature review into user engagement work as appropriate:

- Design user engagement plans focused on understanding customer needs and expectations.
- Be sure that user engagement strategies are nimble and can change course easily when one method is not working, or another has more success.
- Focus on social capital to create higher levels of member engagement by aligning HathiTrust's social capital with member institution priorities.
- Use storytelling as a method for user engagement and to help build collaboration.
- Communicate the value to student success and learning.
- Create Communities of Practice to share knowledge and foster communication between member groups and HathiTrust.

Recommendations Based on Survey

Many of the following recommendations refer to activities or promotions already in place. Headings below indicate whether HathiTrust should continue or "keep doing" these activities in the short term; build on them to "do more" in the medium term as resources permit; or change course or "do less" now. Recommendations for new activities that HathiTrust may want to "try doing" are listed in priority order.

Communications

- Keep doing
 - Continue delivering the newsletter
 - Continue creating 101 webinars.
- Do more
 - Promotion of the HathiTrust Newsletter. Perhaps:
 - Build in a banner to the HTDL asking site visitors if they would like to sign up for the newsletter
 - Include a portion of the newsletter that highlights avenues of support and volunteer opportunities and Community Week.
 - Promotion of HathiTrust services and features so members are aware of their benefits and potential, including:
 - Accessible Text Request Service
 - Shared Print Program
 - U.S. Federal Documents Program
 - Copyright Review Program
 - ETAS log data usage reports
 - Collection Builder tool in HTDL
 - Creative Commons Declaration Form
 - Access to Google Analytics
 - Promotion of HathiTrust Community Week
 - Provide additional instructional videos and online documentation or tutorials.
- Do less
 - Survey results show that social media content and marketing materials, printed marketing materials, and printed user documentation is less useful for the member librarians who responded to the survey. HathiTrust might consider allocating less time and effort in these areas.
- Try doing this: short term
 - The value of HathiTrust is relative to the ability of their users to understand what HathiTrust has to offer and how to access it. Delivering value to this audience means helping them help their users.
 - Provide a simple, user friendly explanation for what HathiTrust is, what it does, and why more than half its repository is not available for reading access.
 - Explain the parameters, strengths, and limitations of its collection concisely and clearly so that its large size is perceived as a benefit rather than as a source of overwhelm or confusion.
- Try doing this: long term
 - Further inquiry into and/or testing the waters for discipline-specific support materials.

Community Building

- Keep doing
 - Continue to host Community Week sessions where members are encouraged to share their impressions of and experience with HathiTrust and each other.
- Do more
 - Host more sessions like the one the User Engagement Task Force led during Community Week, where members can communicate with each other and HathiTrust staff to express both their positive experiences and their frustrations to HathiTrust. These sessions could become an annual opportunity to take the pulse of member library staff.
 - Identify and work with member liaisons who create and/or deliver HathiTrust support locally at their institutions.

Systems Issues

- Try doing this: long term
 - Explore issues reported about the search interface and search results and address these where possible to bring HathiTrust digital library services more in line with user expectations and needs.
 - Explore user interest and the feasibility of introducing chat support service on the HathiTrust website.

Research

- Try doing this: long term
 - Librarians share HathiTrust content once per month to once per week. How does this compare with past surveys/metrics? How are users being referred to the site - from Google search, from libguides, from catalogs? If from libguides, find out what's working for those libguides/libraries/librarians. Research how users are referred to HathiTrust. Through Google Search, LibGuides, or catalog links? Use the findings to find out what methods are the most successful and then encourage members to implement (or enhance) those methods.
 - Potential future project - Cross-referencing data with other existing data:
 - For example, are there trends in the data based on institution size? Job Description, etc

Response as to whether a New User-Oriented PSC Working Group is Needed

┆•Pandemic Silver Lining:

Awareness of HT increased during pandemic

. We believe that the findings of this task force provide sufficient recommendations to guide HathiTrust user engagement activities, particularly in relation to HathiTrust member librarians and staff, for a significant period of time. Equally important, in the past year HathiTrust has hired a small user experience team, headed by HathiTrust User Services Librarian Angelina Zaytsev, that is focused on making improvements to the HathiTrust Digital Library interface, and has already made significant changes to the HathiTrust Book Reader in the spring of 2021. The improvements to the Book Reader were informed by end user feedback from surveys posted on the HathiTrust Digital Library. With this team now in place, we believe that an additional working group to focus on user engagement is neither needed nor required. However, once recommendations of this task force have been exhausted, and if needed or required by the HathiTrust user experience team, it would be appropriate to explore the possibility of creating a user-oriented PSC working group.

Appendices

Appendix A: The Charge of the User Engagement Task Force

Appendix B: Methodology and Data of the Community Week session

Charge: User Engagement Task Force

Background and Governance

HathiTrust's vision statement notes that "HathiTrust will be a vital catalyst for emerging forms of research, teaching, and learning that engage the scholarly and cultural record." The 2019-2023 Strategic Directions suggest a more intentional focus on and investment in User Engagement. The 2019-2023 Strategic Directions include the objective "Strengthen and support our member libraries' efforts to engage users of HathiTrust" within its strategic theme of Empower. The Strategic Directions also include an objective to "Invest in understanding the needs of users and members of HathiTrust" within the Enhance theme. In response, the Program Steering Committee (PSC) is seeking insight into how HathiTrust can most effectively pursue these objectives.

Charge

The User Engagement Task Force has been formed to consider ways that HathiTrust can better understand user needs; and support member libraries in engaging users. The task force will:

- Advise PSC and the HathiTrust staff on issues related to users' engagement with HathiTrust collections and services; and make recommendations to improve HathiTrust support for member libraries in engaging users.
- Liaise with HathiTrust staff to understand how usage data and feedback is currently collected and what can be learned from currently available information.
- Engage HathiTrust member libraries to understand how well informed librarians are about HathiTrust services, collections, and programs and how they could be better supported in communicating with and supporting HathiTrust end users.
- Identify potential changes to current practices and procedures to understand and support user engagement; and to support the capturing of user data and stories.
- Communicate with PSC about the task force's work and progress.
- Recommend whether a user-oriented PSC working group is needed and areas of focus, considering the scope of other working groups and any possible overlap.

Outcomes

Iterative engagement of PSC in the group's progress on this focus should occur through the first year of the Task Force's work. The work should be complete within 18 months resulting in a report and/or other reporting appropriate for sharing with members.

Reporting

Reports to the Program Steering Committee. The chair should prepare quarterly reports for PSC and contribute to PSC's progress reports to the Board of Directors.

Membership/Composition

Membership: Recommended by Chair and approved by PSC. PSC will assist with recruitment of membership from HathiTrust member institutions.

Chair: From HathiTrust Member Institution - appointed by PSC

At least five members from HathiTrust Member Institutions, particularly those with expertise relating to user experience, user testing, reference, instruction, digital scholarship and user liaison work.

Liaison from PSC.

One or more HathiTrust Staff members - Angelina Zaytsev, User Services Librarian, with consultation as appropriate with Jessica Rohr, Member Engagement and Communications Specialist.

Methodology

The User Engagement Task Force delivered a Zoom session for HathiTrust Community Week on Monday, October 26, 2020 titled "Choose Your Own Adventure: Tell Us What You Know About HathiTrust". The Task Force had a number of outcomes in mind when creating the session to gather first-hand qualitative data, these included to:

- The discussion/s should inform the questions we planned to use in a subsequent survey of HathiTrust members.
- Get a snapshot of participants' personal experiences and reflections about HathiTrust.
- Learn about HathiTrust outreach activities that exist at member libraries.

In addition, the Task Force had these desired outcomes for participants:

- Establish and strengthen connections among HathiTrust members
- Be inspired to perform HathiTrust outreach
- Identify shared solutions to engagement and outreach challenges
- Learn more about HathiTrust overall

The session included:

- A brief overview of the work of the User Engagement Task Force
- "3 truths and a lie" exercise
- 4 poll questions (using Mentimeter software):
 - What are three words you would use to describe HathiTrust?
 - What are your favorite HathiTrust services?
 - What are your frustrations with HathiTrust?
 - What, if anything, did you learn from this session?
- 2 breakout room discussions based on the follow questions:
 - Questions for breakout room #1:
 - Please share one story of a success or failure of a patron/personal experience using HathiTrust?
 - What are you doing to engage users/provide outreach to users?
 - Give an example of a successful outreach campaign you have done or one you have seen related to HathiTrust?
 - Questions for breakout room #2:
 - What barriers do you experience in promoting or teaching HathiTrust?
 - What is your perception of HathiTrust engagement/outreach activities?
 - What's the one thing you would change to improve the HathiTrust search interface?

Poll question #3: What are your frustrations with HathiTrust? (35 responses)

Results to the question were organized into categories and tallied (responses that contained more than one frustration were broken into the appropriate categories which accounts for a total of 42 frustrations tallied when there were only 35 total responses):

Frustration Category	# Responses
Search/Search Results/Search Interface	8
General confusion about what HathiTrust is, how to use it, and what's in it	7
Slow loading time	6
Metadata issues	5
Authentication/logging in	5
Downloading	3
Copyright and/or other content restrictions	3
Other	3
User Interface	2
Total Responses	42

Poll Question #4: What, if anything, did you learn from this session? (22 responses)

Results to the question were organized into the following categories and tallied:

Category	# Responses
HT services / About HT services	8
Learning from and about other HT members	5
Appreciation	4
Specific tips and suggestions	4
Other	1
Total	22

Breakout Room Results

Users were randomly assigned to breakout rooms twice during the program. Each breakout room was hosted by a member of the User Engagement Task Force who took notes as participants responded to questions. The quality and completeness of the resulting notes varies, and there may have been breakout rooms that did not record notes at all. Responses are included under the questions below, however it is sometimes difficult to determine which response goes with which discussion question.

Responses to breakout room questions

1. Please share one story of a success or failure of a patron/personal experience using HathiTrust?
 - a. Early after ETAS was turned on, librarians found that the Classics faculty really valued ETAS to do research when they felt like it would otherwise be impossible. They have been including links directly to books/sources in course syllabi. Challenge is that there isn't additional functionality for deep reading. No ability to cut/paste, download, etc. We get why those features aren't there but as the pandemic stretches on and there's no print access, this is frustrating.
 - b. Recent migration to Alma and links to the ETAS records for this fall has been really helpful. On the failure side, how to use Alma analytics to figure out when to stop ETAS is challenging. (UT Austin)
 - c. Increased scrutiny of records due to ETAS has led to an increase in noting problems with the data. The Bibliographic corrections group has been discovering more issues now with additional usage.
 - d. East Asian librarian: people are frustrated about what they're searching, not sure what the scope and comprehensiveness of the collection is in HT. What percentage of X is in HT?
 - e. finding 16th c. tablature for a friend as a lat 20th c. reprint in HT with a successful copyright investigation to open it up; HTRC research about changes in how emergency medicine is approached throughout the late 20th c.; launching UC Request service changes to drive users to HT when they start with an intra-system ILL req (for ETAS, and for PD items now and following ETAS)

2. What are you doing to engage users/provide outreach to users?
 - a. Promoting and advertising: really got on everyone's mind with library closures. Controlled digital lending is really valuable. Our school is mostly STEM so not much overlap - humanities students really use it heavily
 - b. 43% of their print collection was held in ETAS - was really surprised with success of system. Only downside: can't download from browser - students love to copy and paste into documents. But still better to have access than not at all

3. Give an example of a successful outreach campaign you have done or one you have seen related to HathiTrust?
 - a. HathiTrust (was) embedded in a larger outreach campaign “e-Book detective service” (CUNY) where they help students figure out how to access an ebook and when it’s in HathiTrust they are sent there.
 - b. Sharing HTRC training sessions via Zoom, promoting HT and ETAS via library news/bulletins/communications channels and tracking upticks in referral traffic and use that correspond; managing expectations about HT ETAS since it will eventually go away
 - c. Idea: create assignments to incorporate HathiTrust into it. In particular text analysis. Finding the time for the librarians to develop tools/resources/assignments (remembered this idea from someone else proposing it but don’t know what came of it)

4. What barriers do you experience in promoting or teaching HathiTrust?
 - a. Thought about this for a number of years. People are overwhelmed by the number of info resources. Sounds like just another thing. Like but not like other stuff. When they play around may not work as expected. I would like three things to help a user understand about it. Rules about what you can and can’t get. Hard enough to get people to pay attention to WorldCat and catalog and journal resources. Overwhelmed by number of info resources and hard to understand how it might fit.
 - b. Our digital humanities librarian was right on it. She cared - where I couldn’t get others to care. It is really overwhelming to figure out what it is and how to fit it in.
 - c. Worked at a prior university where they had HT and (their) new institution joined HT. The challenge was convincing colleagues about why it was important for librarians to learn about it. But there wasn’t a lot of interest from colleagues. There are a lot of resources out there (libguides). Hired someone to do text analysis and now he’s taken on this work of learning about HT.
 - d. Computational access that might be appealing to digital humanists. We don’t have much going on in digital humanities at our small school - not much interest in D.H. Google Books - faculty are finally using it - don’t understand the difference between HT and Google Books.
 - e. Log in again after selecting HathiTrust (not a conventional practice for other resources, which are tied into campus authentication).
 - f. Things on the internet are free, confusion about open/public domain and logging in/copyright. Opening/closing ETAS - Communication mess for the future?
 - g. Lack of experience/knowledge of HathiTrust Services; building base skills up
 - h. People still don’t realize they need to log in to see ETAS stuff. Is this how presented in catalog? People don’t realize and don’t get the content they need. Not obvious to users. Any way to do single sign-on? Prompt in catalog link - addition- forces it to go through single sign-on.
 - i. Discoverability of what’s in HathiTrust (using Alma). How to get students in there. So much in there.

- j. Working from home - finding things from off-campus (Google Scholar) finding hathitrust links outside of the database. Most of the time I use it, I'm looking for specific content.
 - k. Oftentimes trying to find a particular item and Hathitrust is a resource for meeting that need, rather than searching directly in hathitrust to begin with.
5. What is your perception of HathiTrust engagement/outreach activities?
(there do not appear to be any responses to this question)
6. What's the one thing you would change to improve the HathiTrust search interface?
- a. Things related aren't always on the same record. Run of serials might be on different records. Hard to know if they are the same publication. Makes it very difficult. Especially for bound journals.
 - b. It is what it is. Could be improved. Daunting. So many links to different libraries -- confusing for patron.
 - c. Branding your own library in the interface so that patrons know they have access to materials. Brought to you by...such and such library. What does it mean to be a member?
 - d. Wish there were a NOT besides AND and OR.
 - e. It's not seamless - have to do a few searches - things scanned in by multi libraries with different cataloging - different editions -records.