

Instructions for Card Sort Observer/Note Taker

Effective Note Takers:

- Have good listening skills
- Have good observation skills
- Have decent handwriting skills
- Are able to take notes that are comprehensive, but not word-for-word
- Act as an observer, not as a participant
- Can remain impartial

During the card sort:

Please record pertinent observations and comments from conversations you overhear. Feel free to move around the room in an unobtrusive way.

If conversations aren't happening, or if most people are working individually, you may also quietly ask someone (or a group) exploratory questions:

- "How is it going?"
- "Can you tell me about your thought process so far?"
- "What are you thinking about right now?"
- "Tell me about this set of cards here."

Many people process verbally, so this can help them if they are stuck. However, refrain from offering help with the activity. Reassure them that they are the experts in this activity, and that there are no "right" answers. It's an activity designed to learn where the tricky parts are in our website content so that we can work on them.

Scribble down as many notes as you can. Special things to notice include:

- What people naturally call things, especially if it stands out as non-library lingo
- Comments that you hear multiple times
- Divergent thinking – when people disagree
- Misinformation - we won't correct it for this activity, but we definitely want to note it
- Frustration points in the card sorting process

After the activity and debrief, share and discuss your notes with the facilitator, along with any general impressions.

If you have time to stay and help with recording the data by barcode scanner, that would be most appreciated, too! (It may take an additional hour or more, depending on how many people participate.)

During debriefing:

Please record participant comments on the chart paper as shown below (one page for each question). Don't feel you have to write what they say word-for-word so that you can collect their thoughts quickly.

?	!
O	X

Questions:

- What cards were confusing – they didn't make sense, or need more clarification? (?)
- Were there any cards that surprised you, that you didn't know was on our website? (!)
- What is missing – what would you like to see on our website that you didn't find on the cards? (O)
- We are working to make our new website clean and fast to navigate. Which content seemed unnecessary to you, like it would clutter up the website? (X)