

## **Summary Report on the Library Research Consult Pilot 2017-2018**

**6/15/2018**

**David Michalski**

### **Summary Report pp 1-7**

- I. Overview
- II. Rationale,
- III. Approach
- IV. Setting
- V. Staffing
- VI. Training
- VII. Marketing
- VIII. Assessment Findings
- IX. Looking Forward
- X: Acknowledgements

### **Appendices pp 8-31**

- A: Proposal
- B: Charge
- C: Plan
- D: Marketing Plan
- E: Statistical Reports
- F: Survey Results
- G: Engagement Centered Services: Research Assistance

## I. Overview

During the 2017-2018 Academic Year the UC Davis Library's Research Support Service Department conducted a pilot project called Library Research Consult to develop an efficient and sustainable way of provide expert research assistance to students working on writing assignments popularly assigned across the arts, humanities, social sciences, or cultural studies departments and programs (H/SS) Specifically, this pilot was charged with:

- A: Developing a service to offer meaningful Research Consult interventions to students seeking library research assistance on humanities and social sciences writing assignments.
- B. Developing an outreach plan to advertise this service to the students who will most benefit from this service.
- C: Developing an assessment plan to measure the efficiency, quality, and sustainability of the service plan.

This *Summary Report* describes these plans, as well as their execution during the 2017-2018 Academic Year. It also includes an assessment of the plans, including discussions of lessons learned and possible options for the future as we continue to focus on the Library mission to provide expert research assistance to the world knowledge and prepare students for lifelong learning.

## II. Rationale

The goal of this project was to develop a way to deliver a particular kind of valued library research assistance: the Research Consult. While the demand for look-up or ready-reference service has been declining in our networked world, the need for interpretive and evaluative skills among students has increased as the information environment has become more complex, especially in the humanities and social science higher education, where undergraduate students are routinely asked to engage the scholarly literature in their fields. While the 'term-paper' takes a variety of forms today, it is common for faculty in H/SS departments to assign end-of-term written projects as a means to measure a student's ability to explore, problematize, synthesis, and otherwise engage academic literature. In these assignments students are often asked to integrate primary and secondary sources in the effort to test or argue a thesis statement. In effect, undergraduates are asked to perform literature reviews in ways that turn the library and its collections into their lab as they outline, compare, and evaluate the diverse research projects, literatures, and approaches related to their course-work.

These assignments require high level of information literacy, as well as, a contextual knowledge of collections and discovery tools. As such, they also often lead students to seek out longer interactions with librarians. To meet the demand, Research Support Librarians have initiated a variety of projects over the years. Past attempts, however, suffered from a either a lack-of-focus, or an unsustainable design.

This Library Research Consult pilot was designed around these students' needs, that is, as an Engagement Centered Service as outlined in the 2016 report. (See: Appendix F.) The aim was to deliver high-quality research assistant consultations to undergraduates in a way that was efficient for both students and librarians, as well as sustainable to the UC Davis Library.

### **III. Approach**

The idea was to train a set of librarians who specialize in assisting students in the social sciences and humanities to handle the large demand for undergraduate library research consults, which arise from the humanities and social sciences curriculum, and to make these librarians available for a limited, but consistent set of hours throughout the quarter. We aimed to help more people, and more of the people who would most benefit from this service, in a smaller window of time. To achieve this goal we set forth a plan that reduced the service hours, but increased the visibility of those best prepared to provide the service.

### **IV. Setting**

The Library Research Consult pilot is run on the second floor of Shields at the center of the Humanities and Social Sciences reference collection, which is often used during consultations. It is equipped with a computer with a display that enables co-browsing, and a large desk which allows patrons to share notes, books, and laptops. It also has chairs for the librarian and the patron to facilitate consultations and co-browsing.

This setting proved adequate, but improvements can be made. At a minimum, a better shared screen may be in order, and a new chair for the librarian is necessary. (The facilities order for a better chair for the librarians was placed but not fulfilled.) More thoughtful improvements might take shape in line with some of the suggestions that emerged out of the space planning working group reports, in particular, the placement of this service within a broader suite of writing and research support services, and the construction of offices that make subject librarians more visible.

### **V. Staffing**

Library Research Consult was open from 11-5 Monday through Friday, a total of thirty hours a week. These hours were divided into two-hour shifts and staffed by seven librarians. (Average hours per librarian a week = 4.5) Due to unexpected leaves of absences in the Winter Quarter, the pilot was often run by five people (which amounted to 6 hours per week per librarian).

The staffing plan proved to be successful. At year end, informal survey found that librarians did not feel burdened by the Library Research Consult hours, and there was little difficulty in keeping the hours consistent even during the unexpected absences. The qualities of the librarians staffing the service are noted below in the training section.

### **VI. Training**

Library research consultations are not entirely new for librarians. The 'reference interview' which is a core skill of a public service subject specialists meshes nicely with the Library Research Consultation. This service also benefited from the high level of experience of many of the librarians staffing it. Five of the seven librarians not only had extensive experience providing research assistance to undergraduates working on course writing assignments, these five, because of their subject liaison and collection responsibilities have a deep familiarity with the curriculum and the collections associated with the questions asked. The experiences of this five, and the abilities and the willingness of the two newer

librarians to learn and contribute to the Library Research Consult made training process relatively easy. This being said, it was necessary to review the mission of the Library Research Consult and distinguish the service from older models of reference. This was done by sharing documents outlining our plan, and addressing questions and concerns in quarterly orientation meetings. The librarians also met informally throughout the quarter to share experiences, knowledge of new courses which generated new kinds of questions, and to share awareness of new resources and to swap research strategies. We also set up a log to trade information, but the informal discussions among those working the Library Research Consult proved to be far more popular and useful.

Training and sharing experiences is an important way to raise and maintain the quality of the service. It also was necessary to problem-solve various technical issues we experienced along the way. Given the wealth of experience of the librarians, which includes a familiarity with class assignments, knowledge of the pedagogical techniques that work in the consult setting, and their intimacy with our collections and discovery tools, more opportunities for peer-to-peer librarian training is warranted moving forward.

## **VII. Marketing**

Marketing the Library Research Consult was a key component of its design. If we were to reach more of the people who would most benefit from the service, our marketing campaign would have to be targeted and catchy. Towards this end we used a variety of direct messaging methods. These avenues included advertising our service to course instructors, to undergraduate service providers, and directly to students. We also broadcasted our message through library web site, on the in-library display screens, and by designing and placing a sign in the main lobby of Shields.

All of these messages applied the three marketing principles outlined in the Marketing Plan *Message Simplicity and Repetition, Scalability, and Direct (situational) Marketing*.

Although I feel that the marketing campaign was a success, in that, through feedback, there was a rising level of awareness of the service, several improvements can be made.

The first would be to increase the level of recognition and support of the program within the library itself, such as announcing the service to other library employees, and by providing better support from the Communications Program. Second, better outreach needs to be made during the beginning of the Academic Year. Because of the late start in our advertisements in 2017-18, it was difficult for our message to reach the faculty and department-based orientation meetings. Better coordination with undergraduate research and CEE is necessary. Although important in-roads were made in 2017-18, it is not clear we are taking full advantage of the complementary character of our missions. Finally, because of the inherent noise created by competing messages on campus, and the word-mouth/direct-marketing character of our marketing plan, it was difficult to build-up the name recognition and awareness in a single academic year. Brand awareness requires repetition and consistency. Still, an important foundation has been built among H/SS faculty.

### **VIII. Assessment Findings**

Our Assessment Plan had three components: 1. a *statistical tracking project* that recorded the number of interactions, the kind of patrons asking them, the length of the interaction, and the type, and disciplinary focus of the inquiries being made during consultations. 2. A *user satisfaction survey* designed to measure the patron experience. 3. *Informal discussions* among staffing librarians at quarterly meetings, and on the log.

The *statistics* showed we were quite successful at reaching our intended audience: undergraduates working on research projects. It also showed that nearly 90% of the questions arose from the humanities and social curriculum. As for numbers of interactions, the quarters were roughly even, with slightly declining numbers after the Fall quarter. By recording the departmental home of the course that generated the inquiry, we learned that the service was used by students taking an astonishingly diverse array of course across the humanities, arts and social sciences.

We can improve the statistical tracking project, by adjusting the stats sheet. For instance, anecdotally the over-five minute questions would often run to fifteen minutes. A small adjustment to the sheet could help us record various lengths. Also, adjustment would need to be made if we would like to know more precisely which curricula generated the longer questions.

The *user survey* was, perhaps, not as useful as it was expected to be. We simple did not receive the number of responses needed. We have twenty completed surveys—almost unanimously testifying to the positive-perception, but because of the way the survey was distributed; it is difficult to make much of these results. The librarians found it cumbersome and awkward to hand-out the surveys at the completion of their interactions, and patrons were seemingly reluctant to help us assess the service just as they were digging into their research. Clearly, a better way of measuring user satisfaction needs to be found. One idea was to hand-out stickers (like badges) to those who had visited the Library Research Consult, and then to attach notification of the survey with the sticker. Other means of increasing the response rate, such as entry people into a lottery, were also entertained, but not executed in the 2017-8 AY.

The statistics and surveys are reported in the Appendix E.

As we mentioned above, in “VI. Training”, peer-to-peer *discussions and co-learning* are an important way of improving the service. Listening and learning from these discussions is also an important way of assessing whether we are meeting our goals. The librarians have all seen value in the service and received feedback from the students and faculty they served. In the future it may be necessary to better record and quantify this anecdotal feedback. As subject liaison librarians, the librarians have the opportunity to solicit comments from the faculty who have been sending their students to Library Research Consult, to hear if interactions with librarians are improving academic performance. Additionally, as name recognition of the service spreads across campus, surveys testing the effectiveness of marketing campaign might be deployed.

### **IX. Looking Forward**

Judging from the statistics and the anecdotal data, the pilot for a Library Research Consult service was successful in meeting its goal: to deliver high quality consultations to students conducting library research for course writing assignments in an efficient and sustainable manner.

The program provided a particularly valued service to undergraduates working in humanities and social sciences, including those taking on the core General Education commitments of their degree. As such, it contributed to the goals of these academic departments, which emphasize the need for students to become more information literate and savvy as they take on more complex research projects. While we didn't have an instrument to track referrals to the program, participating librarians report that students often tell them that they were directed to Library Research Consult by their professors. To build the value of program we will need to find ways to increase this positive recognition, and make efforts that strengthen the ties between Library Research Consult and the goals of the faculty who set the humanities and social science curriculum.

Towards this end, librarians working in the humanities and social sciences should continue to promote the service in faculty meetings, in their emails and in the orientation and instruction classes. The Library should embrace and support the program in its communication with the Dean of Letters and Sciences, other university administrators, and academic support units. The program would also benefit from more robust support from the Library's Communications program.

Strengthen our ties to the curriculum will also require librarians to continue their efforts to educate themselves about the library research projects that are assigned by professors. A librarian's familiarity with the educational goals of the class in which a student is enrolled, is particularly helpful to that student. The scale of our university, unfortunately, makes this familiarity difficult. There are, however, ways we can expand our knowledge, such as curriculum tracking. We can also increase the opportunities for subject liaison librarians to informally share and discuss effective research strategies for the assignments that generate the most questions. While the 'slack channel' and the blog were not effective during the 2017-18 AY, other peer-to-peer 'discussions/training proved to be an effective way to raise the quality of our service.

We can also do more to study the interactions between undergraduate students and librarians. While it is interesting to know which academic units generate most questions, a targeted research project might also be directed to better understand the kinds of research assignments that most frequently lead to librarian student encounters. Are term-papers changing? How? And if so, how do such changes influence librarian practice, or the development of the library's research assistance programs?

With these adjustments to our outreach, training, and assessment in mind, the Library Research Consult pilot (as planned and executed) provides the library with a successful tested model, should the Library choose to continue to offer students seeking assistance on H/SS writing assignments timely and meaningful Research Consult interventions.

In conclusion, it is important to note other values the pilot has provided to the library, values which help us learn how we can better achieve our purpose.

It has helped subject librarians working in the arts, humanities, social sciences and cultural studies maintain and grow their connections to the departments they serve by providing them with significant information about how undergraduates understand the Library, our collections, and discovery tools. When librarians encounter students in the midst of their coursework, they become better able to calibrate their collection development, hone and contextualize their instructional skills, and make the library more accountable to the departments it is built to serve.

The tremendous reach of this minimally staffed public-facing service shows that the library can provide the expert research assistance needed to support undergraduate achievement and lifelong critical thinking skills. Documentation of these efforts can be shared with the Dean of Letters and Sciences, the

Vice Provost for Undergraduate Education, and the Chancellor, as evidence of the Library's efforts to promote student learning and research collaboration.

**X: Acknowledgements**

This program would not be possible without the oversight and direction of Beth Callahan, the staff support of Arden Gabor, and the staffing of librarians, who together consistently sought to improve the service, Adam Siegel, Melissa Browne, Amy Bush, Roberto Delgadillo, Daniel Goldstein, and Jennifer Harbster.

## Appendices

### A: Proposal

#### Research Support Services

#### **Proposal: From Reference to Research Consults**

6/12/2017

#### Goal

*The goal of this project is to develop a sustainable way to increase the use of a particular kind of valued research assistance among students working on arts, humanities, social sciences, or cultural studies (H/SS) writing assignments: the Research Consult.*

#### Rationale

The Research Consult aims to instruct students how to make the best use of library resources in the completion of writing assignments (such as term papers, senior theses, and other coursework). These longer research consults with subject librarians, which range from 10-30 minutes, have proven to be an effective way to address complex information questions which accompany H/SS research/writing assignments. Past efforts to schedule this type of research assistance service to students, variously marketed as "Paper-Aid," (c2000-2004) "ReSearch Start" (c2005-2010) or as part of "Librarian Office Hours" (2008- present), have been widely popular, but the high demand for these programs often overextend librarians.

This project seeks to develop a sustainable plan to offer Research Consults to students working on H/SS projects, one which...

- Takes advantage of subject librarian expertise, while maintaining a diverse range of reference and research assistance services across the libraries.
- Targets those courses and students who will most benefit from this service.
- Creates the necessary efficiencies needed to 'scale' this valued service.

#### **Background: Why change reference?**

While we changed the name of the H/SS reference desk on the second floor of Peter J. Shields Library a few years ago to the Research Consult Desk, we have done less to redefine or restructure services at the desk in relation to new campus needs, and the growing suite of research assistance services offered by the Research Support Services and other departments. The practice of reference librarians aiding H/SS students has changed dramatically in the past ten years. It has moved from a practice dominated by the need to provide assistance to patrons in discovering and locating sources, to meet an increased demand for assistance in developing research strategies, and evaluating and interpreting sources for the composition of course assignments. This change in practice is particularly felt in the Humanities and Social Sciences. (A 2011 user survey showed 72% of complex reference transactions in Shields Library came from students working on writing assignments in H/SS coursework).



**Background: Current Staffing**

The second floor desk is built to handle these complex H/SS research questions. It is staffed by the Research Support Services librarians who serve as subject specialists in the Arts, Humanities, and Social Science, and Cultural Studies and is placed centrally among the cognate reference collections.

H/SS focused Research Support Services librarians (previously, six) have staffed the desk between 11-6 Monday through Thursday, 11-5 Friday during the Fall, Winter, and Spring Quarters, providing 34 hours of service per week) and serving about 1200 visitors per (408 service hours per) quarter . Based on 2013-14 stats average, at 12 weeks a quarter, these librarians serve about three students an hour.

This is a good amount of students, but we believe we can and need to reach more. Unfortunately, for all the hours these librarians spend scheduled, we know from studies and anecdotal information that we are only reaching a fraction of students who would benefit from knowledge about the Research Consult services. We also know that some of the students approaching this desk, (about 10-15%) are asking directional, access services, or library policy questions, which can be addressed elsewhere.

Experience and statistics also tell us that Research Consult services, while highly valued by Faculty and undergraduate students in H/SS, are not uniformly needed throughout the quarter, leading us to believe that in addition to better outreach, smart or intentional scheduling of Research Consult Services can achieve greater efficiency, and an uptick in the students taking advantage of this service.

**Background: Why Not Go 100% Off-Desk?**

A public Research Consult desk isn't the only way for H/SS students to encounter a librarian and get writing assignment support, nor ought it to be. Today, subject librarians do digital outreach through subject guides, hold off-desk appointments, meet students in the classroom, and connect through email, telephone, chat. These other service points are, however, also time-consuming. Off-desk appointments and chat suffer from their own inefficiencies, when compared with walk-up, face-to-face meetings. Appointments can be difficult to schedule, and chat and email is best suited for a ready-reference type of transaction.

Developing an approachable centrally located 'post' in the Library remains an efficient way to create a meaningful intervention for undergraduate seeking research help. It allows us to both reach large numbers of students when they are ready to work. And it is a great way for us to build upon our identity as a pro student-scholar institution, that is, it remains a great way to get the word out about our mission, services, and collections.

- Face-to-face meetings in the library's H/SS reference section, with individuals or small groups, creates an effective and memorable communication / instructional environment,
- Interpretive tours through our hybrid collection of print and electronic sources can open doors for new students learning how academic knowledge is organized.
- A public, approachable setting allows librarians to conduct the kind of reference interviews that allow them to customize our services to the needs of students, and in turn, better enter the research networks of the people we serve.
- Having librarians available to the public personalizes the library in a way that makes the library professionally accountable to the students and the curriculum.
- By being physically accountable to the public, librarians are able to learn about the most library intensive courses, and the professors who teach them.

- It allows the library to take advantage of an opportunity to assess how we are used and perceived by the people we serve. Librarians in this position are able to see where our collections best serve curricular demands, and where we may need to develop our collections. Seeing student's work also allows us to observe, first hand, how our web pages and digital services are navigated by our patrons. What happens at the desk gives us insight into remote user experience.

These benefits have their costs and meet up against real staffing limits. The question is: how can we reach more people, more efficiently?

*We need a way to make our public hours more impactful and efficient so that more students can take advantage of the benefits Research Consult, while allowing for greater flexibility among the H/SS-focused RSS librarians.*

**Deliverables:**

By defining and marketing the Research Consult service we will look for a way to *contract our hours* and *reach more people*.

This project will investigate the best way to redefine and restructure the Research Consult desk to better distinguish the Research Consult from other forms of reference assistance, such as those provided at the Information Desk and through scheduled appointments, and, in doing so, concentrate and promote the unique advantages of the Research Consult.

By Fall Quarter 2017:

- We will work with data (such as, past reference statistics, schedules, and surveys), and stakeholders (such as, faculty, administrators, students and librarians) to develop a plan to offer students seeking assistance on H/SS writing assignments timely and meaningful Research Consult interventions.
- We will develop an outreach plan to advertise this service to students who will most benefit from this service.
- We will develop an assessment plan that will measure the efficiency, quality, and sustainability of this service plan.

**B: Charge****REFERENCE SERVICES WORKING GROUP CHARGE (9/21/2017)**

Pilot a research assistance program organized by the UC Davis Library's Research Support Services Department to provide assignment-specific research assistance to students assigned to writing and research projects, with special emphasis in supporting those working in the humanities, social sciences, and related fields.

As outlined in more detail in a separate document the pilot is intended to promote:

- a service to offer students seeking assistance on H/SS writing assignments timely and meaningful Research Consult interventions.
- outreach to advertise this service to students who will most benefit from this service.
- assessment that will measure the efficiency, quality, and sustainability of this service plan.

**Tasks/Deliverables and Timeline:**

The pilot is intended to run for two quarters: Fall 2017 and Winter 2018.

By July 2018, the group will:

- work with data (such as, past reference statistics, schedules, and surveys), and stakeholders (such as, faculty, administrators, students and librarians) to develop a model to offer students seeking assistance on H/SS writing assignments timely and meaningful Research Consult interventions.
- Develop, launch and evaluate an outreach plan to advertise this service to students who will most benefit from this service.
- Develop, launch and evaluate an assessment plan that will measure the efficiency, quality, and sustainability of this service plan.

*Membership:* The group includes RSS staff with relevant experience. Members: David Michalski, Chair, other members tbd.

*Communication:* The Group reports to the Head of Research Services. The group Chair inform Research Support Services on a regular basis of progress on completing the charge.

*Out of Scope:* Actions or recommendations related to the development, shaping, or change to any reference collection are out of scope for this group.

**C: Plan****Research Support Services**  
**The Library Research Consult Program**  
Plan for the 2017-18 Academic Year  
8/25/2017

This plan outlines the Library Research Consult program, a research assistance program organized by the UC Davis Library's Research Support Services Department to provide assignment-specific research assistance to students assigned to writing and research projects, with special emphasis in supporting those working in the humanities, social sciences, and related fields.

This plan fulfills the charge of the *Proposal: From Reference to Research Consult* to develop:

- a service plan to offer students seeking assistance on H/SS writing assignments timely and meaningful Research Consult interventions.
- an outreach plan to advertise this service to students who will most benefit from this service.
- an assessment plan that will measure the efficiency, quality, and sustainability of this service plan.

This plan contains plans for the staffing, training, location, marketing, scheduling, and assessing the program.

**Staffing**

The Library Research Consults program will be staffed by 7 Librarians: Melissa Browne, Roberto Delgadillo, Daniel Goldstein, David Michalski, Adam Siegel. Additional support is provided by Jennifer Harbster, because of her valued background in Government Information and Business librarianship, and a temporary librarian, who will specialize in research assistance in a reference setting.

The program draws on the Research Support Services Librarian Subject Liaisons who work most closely with the faculty and departments in the humanities, social sciences and related fields, those academic fields most likely to assign library writing and research projects, such as term papers to their students.

These librarians are best positioned to assist and guide people seeking research support from this program because:

- They have experience conducting reference interviews, teaching information literacy in a reference consult setting, and staging and triaging lines.
- They also maintain knowledge of the undergraduate and graduate student experience in the humanities, arts, social sciences and cultural studies, the faculty teaching goals in these fields, as well as knowledge of how our library services, tools, collections, and programs can assist these users.

**Training of Staff**

The subject-liaison Librarians are generally knowledgeable about our academic programs, student assignments, and our resources. They are also experienced in teaching information literacy in a reference setting. This program will build upon these skills by designing a training program to meet the needs of the research consult. We will focus on how best to prepare students to meet faculty expectations, while emphasizing the skills necessary for them to become independent and confident information researchers in their fields of study. Librarians will also be encouraged to build on our collective experiences with our researchers, to enhance the quality and effectiveness of the program.

The training program includes general principles of practice, peer-to-peer subject-based tips workshops, and a staff-only 'Research Consult' Slack Channel, where the program staff and share tips, incidents, and alerts.

*Working the Library Research Consult: General Principles of Practice*

This quarterly orientation meeting will discuss the program logistics and outline our expectations for service in the program. We will be using a model which goes beyond traditional reference to integrate information literacy and customized search strategies. We will emphasize the need to Listen, Orient, Instruct, and Refer. The goal of this model is to provide each visitor with context-specific information that enables one to emerge from the research consultation better able to understanding how the library is organized in relation to their interests, better able to use the tools necessary for one's project, and better able to continue one's inquiry with appropriate references and referrals.

*Peer-to-Peer Subject-based Tips Workshops*

These workshops will be organized around frequent student assignments. They will be led by librarians who have the most familiarity with the teaching and research goals in the fields from which those assignments arise. They will not be as thorough as to cross-train subject specialty, but the workshops will be design to share approaches to assignments, and highlight key subject-based reference sources. Potential workshops may include: What every Librarian ought to know about...History, Music, Ethnic Studies, or Psychology...

*Research Consult Slack Channel*

Communication about our experiences doing Library Research Consults is a key to improving our service. A staff-only bulletin board will not only allow us to share tips, alerts, and approaches, it will allow us to log problems and ideas for future improvements, and inform our quarterly orientations.

**Location of Service**

In the Fall of 2017, the Library Research Consult Program will be hosted on the second floor of Shields Library near the Humanities and Social Sciences Reference Collection.

This site, which offers a wide-desk, chairs, a shared computer screens for instruction, and a telephone is located in a public and approachable area of the Shields Library, which is itself situated at the center of Davis campus life.

Shields Library is positioned adjacent to the Quad, the Memorial Union, and the Student Community Center (and the future Graduate Student Center). It is also positioned near the buildings with the heaviest classroom use, particularly in the fields this program is designed to serve. It is near the Social Sciences and Humanities Building, Voorhies, Hunt, and Wellman, Olsen, and Sproul. In addition, the recent conversion of space in Shields Library for University Writing Program classrooms places some of the programs most active users in the building.

The second floor of Shields Library is also situated within approximately 40,000 volumes of specialized humanities, social sciences and government information reference resources, a collection which has been curated by Librarians to support research assistance and complement our growing electronic guides, search tools, and electronic reference tools.

This location also benefits from its proximity to public access computers and the regular loan stacks for much of the material in social sciences and cultural studies. It has the advantageous of good lines to those exploring the building, and proximity to both heavily used study space, and the offices of many of the Librarians who will staff the program.

Developing and nurturing a space, such as this one, as a place where students can find professional assistance, as a sort of workshop or laboratory to work on their assignments ought to be a key feature of this program. Throughout the academic year the staff will examine the conditions of this place with the goal of making it more conducive to objectives of Library research support.

### **Marketing**

A key component our project is launching a marketing program that can effectively direct our program to those who will most benefit from library research assistance. Our strategy relies on three principles: Message Repetition, Scalability, Direct (situational) Marketing.

#### *Message Repetition*

We want to promote a consistent brand for our service, one that speaks clearly about our name, what we do, where we do it, and when it is available. This consistent message, which will appear in all our advertisements, will contain the core name, a brief description, the location, and our core hours. As we market directly to different audiences, and as we extend hours to compensate with high demand we will augment this basic message.

This basic message can be repeated on the web, in email signatures, or on social media (see twitter version below) .

--

Library Research Consults

Visit Shields Library, 2nd Floor  
Monday through Friday  
11AM -5PM

Meet with a Librarian for help with assignments, papers, and other projects in the Social Sciences, Humanities, and related studies.

--

Example of Twitter version:

Library Research Consults: Librarians help w/assignments & other projects in Soc Sci, Hum. & related studies 11-5MF 2Flr @UCDavisLibrary

#### Scalability

Message scalability allows us to develop and embellish the core message about our program to attract new audiences, provide details, and encourage greater participation.

--

Library Research Consults

Meet with a Librarian for help with assignments, papers, and other projects in the Social Sciences, Humanities, and related studies.

Help with:

- Scholarly articles
- Literature reviews
- Locating data sources
- Search strategies
- Books related to your courses

Visit Shields Library, 2nd Floor

Monday through Friday

11AM -5PM

--

Upgrade Your Paper!

Library Research Consults

Shields Library, 2nd Floor

Monday through Friday

11AM -5PM

Assistance is available for term papers, theses, and other projects with Librarians specializing in the Social Sciences, Humanities and Cultural Studies.

--

Research Help: Bring Your Assignment to Us.

Library Research Consults

Shields Library, 2nd Floor

Monday through Friday

11AM -5PM

Assistance is available for term papers, theses, and other projects with Librarians specializing in the Social Sciences, Humanities and Cultural Studies.

--

Paper-Aid

Library Research Consults

Shields Library, 2nd Floor  
Monday through Friday  
11AM -5PM

Assistance is available for term papers, theses, and other projects with Librarians specializing in the Social Sciences, Humanities and Cultural Studies.

--

Research Start: Help with Writing Assignments

Library Research Consults  
Shields Library, 2nd Floor  
Monday through Friday  
11AM -5PM

Assistance is available for term papers, theses, and other projects with Librarians specializing in the Social Sciences, Humanities and Cultural Studies.

### *Direct Marketing*

To reach the people that will most benefit from our program we will use the data we collected about the patrons (school, class, department, professor) who have sought out consultations in the past to better direct our messaging. Subject liaisons will be tasked to customize the description of our program to specific audiences. Drawing from Digital Outreach we will invite potential users via social networks, CMS, listserves, and direct emails. Examples of direct or situational marketing may also include customized Library "Newsletters", or exchangeable blog or news article that might be shared on departmental websites.

### **Scheduling**

One of the goals of this program is to make librarian time in public spaces more efficient by reaching more of the people who will benefit from our service, without placing undue constraints on librarians schedules. Towards this end, we will use *core hours* and *smart scheduling* to lend to consistency and flexibility to our program.

#### *Core Hours:*

11-5 Monday through Friday (During Classes and Exam Week)

Having core public service hours will help our marketing campaign, and enhance a sense of place for students engaging in library research. The proposal for these core hours is based on past statistics and patron expectations.

These core hours amount to:

6 hours every weekday

30 hours a week.

An aggregate average of 4.3 Librarian hours per week (30hr/7 librarians) or .86 hours per weekday (6hr/7 librarians).

#### *Smart Scheduling*



In addition to these core hours we will have the option to extend hours, adding hours before 11am or after 5pm to compensate for anticipated demand during the days when writing assignments are 'heating-up'. Our reporting and statistics indicate that these times will be after mid-terms and right before and during finals.

**Assessment:**

Our multi-instrument plan to measure the character and effectiveness of the Library Research Consult Program will *track* questions types and *survey* patron experience and satisfaction.

*Tracking the Question*

Alongside the traditional statistics-keeping instrument we have used to track interactions based on ARL categories, we also keep track of additional information, including the patrons status (undergraduate, graduate student, researcher, faculty, public). Whether the question arises from coursework or not, and if so, the disciplinary origin of the inquiry (department or school). We will also track whether or not the question is related to a term paper, graduate writing project, or other project.

*Feedback Survey*

While it is difficult to record information about the effectiveness of reference interactions, we will implement online short survey to do so, and request (and entice) patrons to answer our short (eight question) survey.

Using multiple choice and Likert scale questions where we can, we will ask these questions:

1. When did you use the Library Research Consult?
2. Was your question related to coursework?
3. How long was your interaction at Library Research Consult?
4. Did you learn more than you knew about Library services and collections?
5. Did you learn more than you knew about how to conduct effective library research?
6. Did you learn how to continue your research or find additional assistance?
7. What was your overall satisfaction with our Library Research Consult service?
8. How helpful was the librarian?

These assessment methods (alongside an analysis of the librarians' feedback, recorded on the Reference Experience Blog, and in quarterly meetings) will help us to assess the program and better understand the needs of our user communities.

**D: Marketing Plan****Library Research Consults Winter Quarter 2018 Marketing Campaign**  
12/18/2017

This marketing campaign aims to promote the Library Research Consult service during the Winter quarter (2018). Although our Library Research Consult service welcomes any patron, it has been developed to assist the large population of undergraduates working on writing assignments that require library research, such as those popular in the humanities and social sciences. Statistics from the Fall 2017 quarter show that our primary user group is made up of undergraduate students working on course assignments in the humanities and social sciences, and that we are only reaching a small percentage of this population. (See Fall 2017 Quarter Stats Summary below). Our campaign is designed to avail our services to more of this population.

**Plan for the Winter Quarter 2018:**

We will continue to use a variety of avenues to reach students. These avenues include advertising our service to course instructors, to undergraduate service providers, and directly to students. So far we have been using the library web site, and direct emails to user groups. In the Winter 2018 quarter we will also include a combination of digital and print tools. In constructing these advertisements we will continue to apply the three marketing principles we developed over the Fall 2017 quarter: *Message Simplicity and Repetition*, *Scalability*, and *Direct (situational) Marketing*, with some adjustments and improvements.

We will also make additional efforts: We will make a greater effort to reach the large numbers of undergraduates who frequent Shields library by *Increasing the Awareness of our Presence in the Library*, through signage, and by leveraging the ability of the library staff to promote our service. And we will work on *Timing and Coordinating our Marketing Efforts* to get the word out about the Library Research Consult when our statistics show the services in most needed: in the beginning of the quarter as students interpret their syllabi (first three weeks), and in the mid-term and after (about three weeks) when students are grappling with end of term assignments.

***Message Simplicity and Repetition***

We want to promote a consistent brand for our service, one that speaks clearly communicates our name, what we do, where we do it, and when it is available. This simple consistent message, which will appear in all our advertisements, will contain the core name, a brief description, the location, and our core hours. As we market directly to different audiences, we will augment this basic message. To enhance the recognition of our message we will look to produce a consistent font and graphic design.

**Library Research Consult  
Shields Library, 2<sup>nd</sup> Floor  
Mon.-Fri., 11am-5pm**

### *Scalability*

Message scalability allows us to customize our core message about our program to attract new audiences, provide details, and encourage greater participation. It also allows us to 'time' our message to the demands of course schedules. Below is an example of a message which has a couple of lines appended to our core message.

**Term Paper Due?  
Library Research Consults  
Shields Library, 2nd Floor  
Monday through Friday  
11AM -5PM  
Meet with a librarian for help with assignments, papers, and other projects in the Social Sciences, Humanities, and related studies.**

In the Winter 2018 quarter we will also be looking for a small collection of images that can be associated with this message. These images will be helpful as we expand our digital and print advertisements.

### *Direct Marketing*

To reach more of the people who may benefit from our program, we will use the data we collected about the patrons (school, class, department, professor) who have sought out consultations in the Fall 2017 Quarter to better direct our messaging. We will continue to use subject liaisons to market program by way of email 'sig-lines' to students and course instructors in the humanities and social sciences. In addition, we will try to get our message out to a variety of undergraduate services at interact with students who are working on research assignments, such as Student Academic Success Center: <http://success.ucdavis.edu/services/writing.html>. In the Winter 2018 quarter we will make sure this center is aware of our service and how their clients can reach us. This will include meeting with their staff and offering print handouts about our service, which they can distribute to students. This may lead to a fruitful reciprocity, as research and writing skills are very-much connected in the humanities and social sciences.

### *Increasing the Awareness of our Presence in the Library*

Space studies have shown us that Shields Library is a busy with undergraduates. With better in-library signage (digital display and print) and with more word-of-mouth advocacy from our public service personnel, we have a great opportunity to get the word out. We will need

postcards, and print sign for an easel in the lobby, and a digital sign. We will also need to hold a open meeting to explain our service to library staff.

### *Timing and Coordinating our Marketing Efforts*

The students we wish to reach are inundated messaging about various campus services. Due to this saturation we will need to get our message out where and when the students are ready to do library research. In addition to providing messages in the library space, on the library website, and at the Student Academic Success Center, we will look to time our messaging to two, three-week periods in the quarter: in the first three weeks when students are confronted with new syllabi and looking for opportunities to get oriented to their classes, and in the mid-term / post-mid-term weeks when students will be actively working on end-of-term writing assignments that require library research. Toward this end, we will syncretize library news stories (on the website) with social media and direct marketing messages, as well as physical, in-Shields library messaging, in the lobby (on our poster, and the digital display.)

Peak marketing times for Winter 2018 Quarter:

January 11-29

Feb 12,-March 9

### **Marketing Support**

To realize this plan we will need to have some graphic and administrative support. In terms of the graphic support, we will need:

- postcards (about 200 for both Shields and the Student Academic Success Center)
- a poster for Shields Library lobby
- a digital display image for the electronic lobby display.
- We will also need a small selection of images to accompany our news and social media messaging.

To increase word-of-mouth advocacy in the library we will need to construct a library-all email message to announce the service, and schedule an open informational session about the serve for all library staff.

### **Our Message:**

Library Research Consults

Shields Library 2<sup>nd</sup> Floor

Monday through Friday

11am-5pm

The Library Research Consult provides drop-in, in-person, research-assistance to all patrons with questions about the use of the library, its services, and collections. The service is especially designed to help students complete library research associated with writing assignments in the humanities, social sciences and related topics. It is staffed by Research Support Services librarians who work closely with the faculty offering courses in these and related disciplines.

Library Research Consults are structured to teach patrons how to use our tools and services, how to discover, evaluate and organize resources, and how to become better library researchers in relation to their academic needs. If you meet patrons looking for help, please let them know Library Research Consults are available to them.

**E: Statistical Reports**

**Library Research Consult Quarter Stats Summary**

**Updated 4/2/2018**

	<b>Spring 2018</b>	<b>Winter 2018</b>	<b>Fall 2017</b>
Service Hours:	288	318	312
Patrons:	474	663	768
Patrons per Hour:	1.65	2.08	2.46
<i>Patron Category:</i>			
Undergrad:	294, 62%	463, 70%	570, 74%
Faculty or Graduate Student:	53, 11%	63, 10%	62, 8%
Staff or Public:	47, 10%	52, 8%	36, 5%
* Unrecorded:	80, 17%	85, 13%	100, 13%
<i>Interaction Characteristics</i>			
>5 mins:	263, 55%	376, 57%	396, 52%
Research/Course Related:	281, 59%	413, 62%	361, 47%
Course or Research Area Recorded:	275, 58%	348, 84%	386, 106%
H/SS Course or Research Area (number, percent of recorded):	238, 87%	322, 93%	334, 87%
Science Course or Research Related: (number, percent of recorded):	37, 13%	26, 7%	52, 13%

**For more information on the Statistics, see these files in Google Drive: LRC Stats Fall 2017- Winter 2018.xlsx**

**F: Survey Results**

*Library Research Consult Survey (2017-18)*

June 12th 2018, 7:46 pm MDT

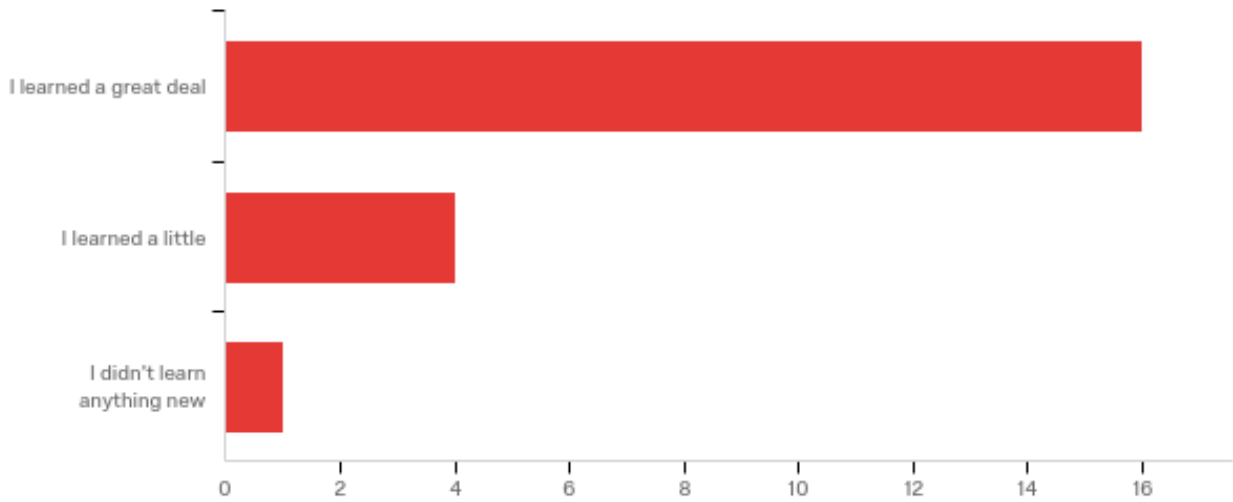
**Q17 - Which choice best describes your status?**

#	Answer	%	Count
1	I am an undergraduate student	75.00%	15
2	I am a graduate student	10.00%	2
3	I am a faculty member	5.00%	1
4	None of the above	10.00%	2
	Total	100%	20

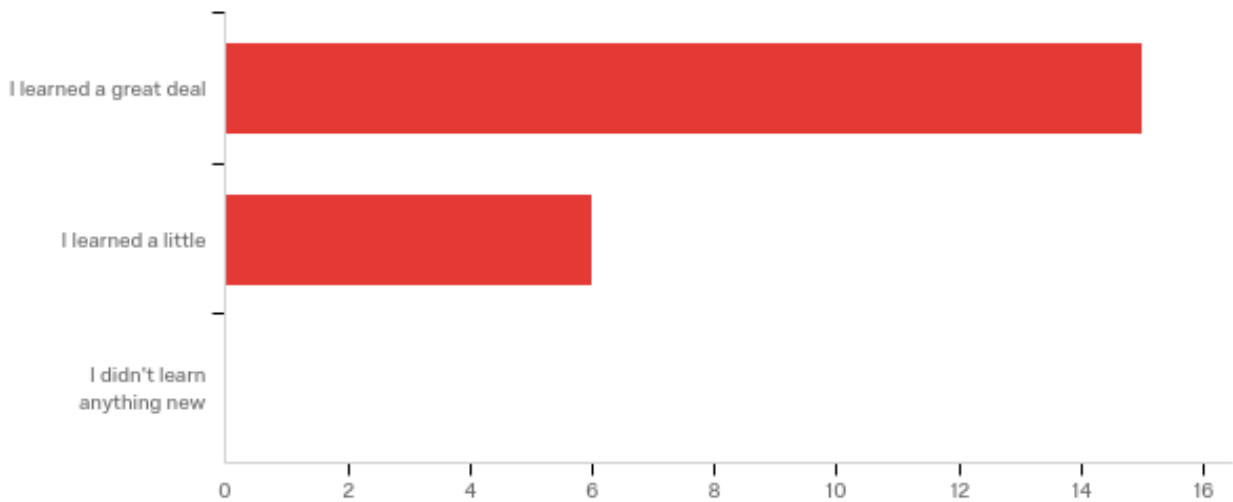
**Q8 - How long was your interaction at Library Research Consult?**

#	Answer	%	Count
1	Less than five minutes.	0.00%	0
2	Between five and ten minutes	33.33%	7
3	Over ten minutes.	66.67%	14
	Total	100%	21

**Q34 - From your visit to Library Research Consult, how much did you learn about the collections and other information available to you?**

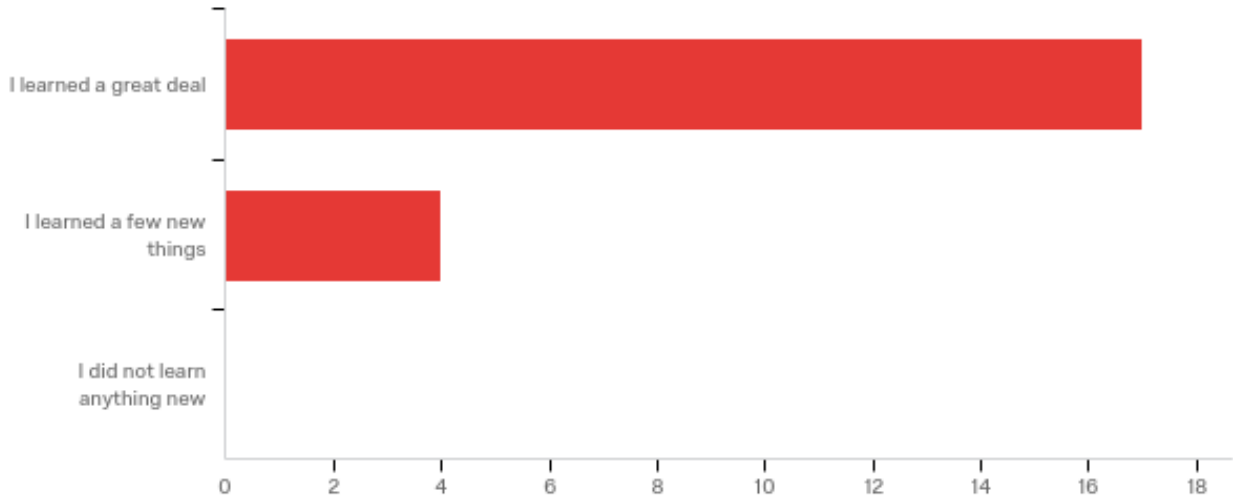


**Q36 - From your visit to Library Research Consult, how much did you learn about the library services available to you?**

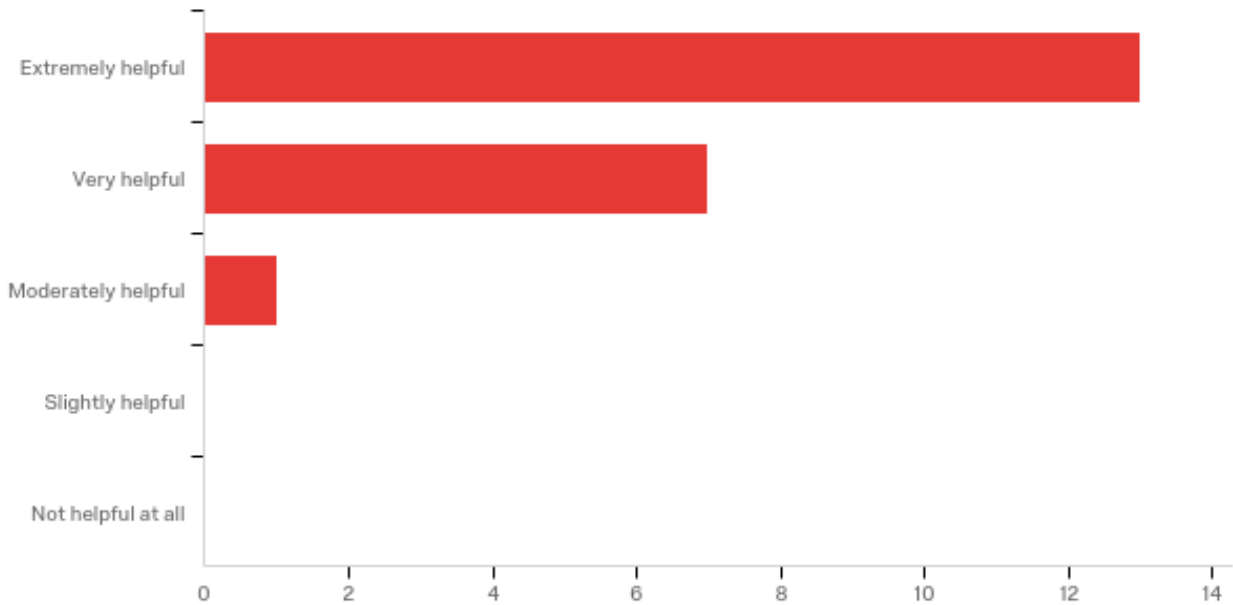


**Q38 - From your visit to Library Research Consult, did you learn more than you knew about how to conduct effective library research?**

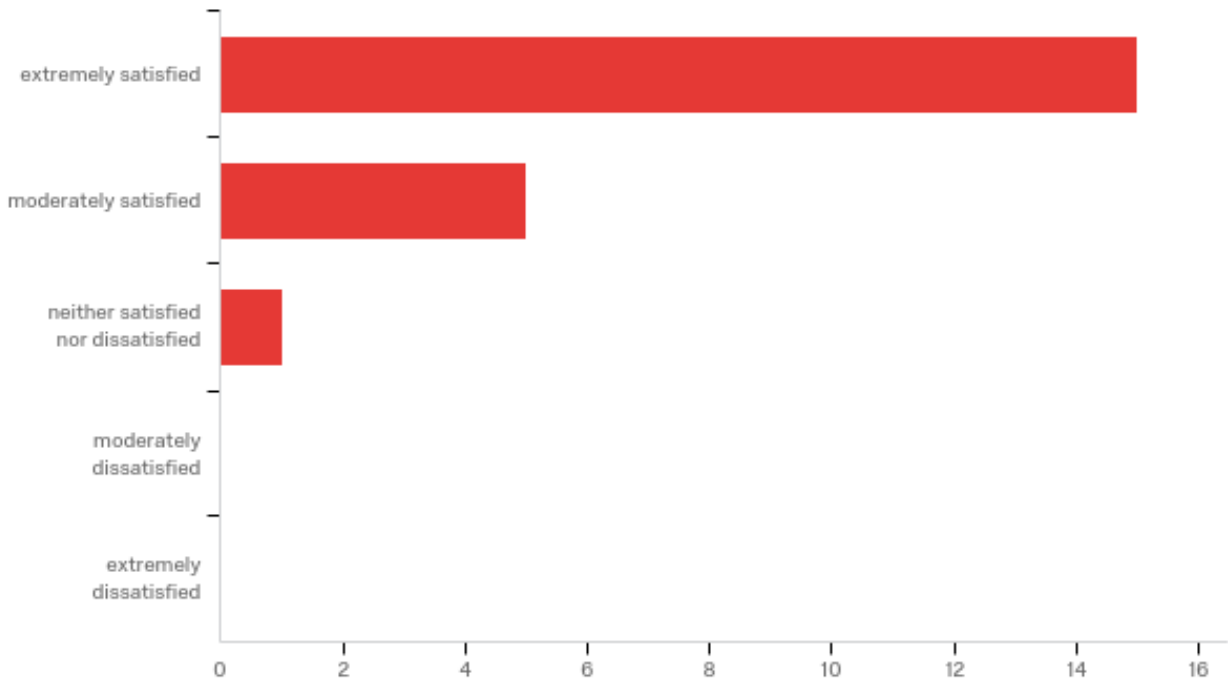




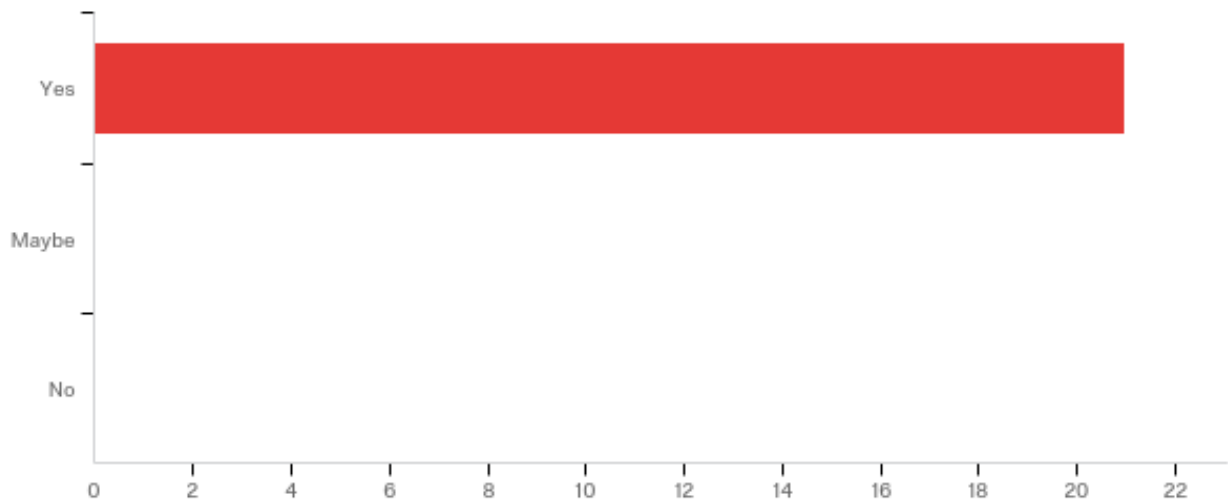
**Q40 - How helpful was the Librarian in helping you to effectively use library and research tools?**



**Q16 - Overall, how satisfied or dissatisfied were you the Library Research Consult service?**



**Q46 - Would you recommend the Library Research Consult service to a friend, classmate, or colleague?**



**F: Engagement Centered Services: Reference and Research Assistance****Research Support Services: Reference and Research Assistance (11/29/2016)**

- **What we are assigned**
- **Who does Research Services want to reach with this service? Who is the intended consumer of the service?**
- **Current Components of the RSS Reference and Research Assistance program**
- **Relationship with Collections, Outreach and Instruction Duties**
- **Core Competencies: What it takes to be Successful**
- **Definition of Success**
- **Appendix: general description of the weekly impact Reference and Research Assistance responsibilities have on a Research Librarians' work life.**

**What we are assigned:**

Research Support Services (RSS) Librarians and staff are assigned to provide a range of reference support and research assistance services to the University' multifaceted public, which includes students, faculty, and researchers, as well as the broader community of researcher and the public-at-large, in the effort to aid, facilitate, and advance course work, teaching objectives, research projects, intellectual growth and patient care. The Reference program of RSS is particularly focused on making sure all patrons of the University Library are able to take advantage of the information resources available to them through the University Library and beyond. For this reason, reference librarians and staff endeavor to maintain a current awareness of both the needs of our diverse communities, an expansive knowledge of the resources available locally and information networks around the world, and the best practices for the provision of research assistance.

In the past, reference and research assistance was largely conceived as the work of the reference librarian, who acted to facilitate an exchange of information between a patron seeking an answer to a question, and a particular information source, which might provide it. In recent years, however, not only has the role of the reference librarian been significantly reassessed, but reference and research assistance has been more accurately understood as a more holistic program within the panoply of the academic services offered by university libraries.

In 2008, a report by The American Library Association's Reference and User Services Association marks the expanded definition of reference work. In it, the reference transaction is characterized as a consultation in which library staff recommends, interprets, evaluates, and/or uses information resources to help others to meet particular information needs. This report is also noteworthy, in that it includes within its definition of reference work, other activities that involve the creation, management, and assessment of information or research resources, tools, and services. (See: <http://www.ala.org/rusa/resources/guidelines/definitionsreference>)

This expanded definition coheres with the reference and research program developed by the Research Support Services Department, which has sought to establish a system of care across the libraries it serves, meeting users where they are, both through remote forms of communication (including, phone, email, chat, social media) and through *in situ* engagements (such as at public service desks, at meeting places, and in other spaces conducive to providing the reference experience). We also aim to me our

users where they are at intellectually, by offering a spectrum of research assistance services and spaces, including by building research guides that range from basic to complex, establishing peer-to-peer help stations, developing reference collections and tools in print and online, by leading orientations and staffing information and concierge service desks, by providing traditional reference interview consultations, ready access to subject experts, and even long-term research partnerships.

**Who does Research Services want to reach with this service? Who is the intended consumer of the service?**

Our primary focus is to develop a system, which serves the teaching, learning and research needs of the faculty, students and research and academic staff of the university. We are also committed to serve the broader research community and the public, including students and faculty at higher education institutes across the state, visiting researchers to our campus, as well as public scientists, policy researchers, and others who are interested in academic research.

**Current Components of the RSS Reference and Research Assistance program**

Online

Website and Subject Guides

Email

Chat

Social Media

Peter J. Shields

Information Desk

Research Consult Desk

Office Hours

PSE

Carlson

Blasdell

Other Remote and Embedded Modes

**Relationship with Collections, Instruction, and Outreach Duties of Research Support Services**

While for the purposes of this report instruction, outreach and collection development are formally separated from research assistance and reference, reference work is intimately tied to these components of Research Support Services. The quality of reference work is, in fact, enhanced by the depth of the librarian's interaction with both the lifeworld of the scholar and the landscape of scholarly communication. Knowing the course objectives and teaching intentions of our faculty informs how we approach questions from students seeking assistance in their courses. Knowing about new publication

projects or the editorial foci of the academic press aids our assistance to faculty who may be seeking to maintain currency in their fields. Graduate students benefit from our familiarity of the keywords and jargon that mark the discursive limits of various studies. Our knowledge of the organization of scholarship helps their decision making as they seek plot their original course and intervention into the academia. The more involved we are in learning styles and research patterns of our patrons the better equipped we are to serve them. And the more we know about the life cycle of information the more effective we become as partners to those engaging in coursework and research.

The reference and research assistance programs of the University Library, like other public service interfaces, also provides Library management with an important source of information about patron aims, problems, and behaviors. The reference system is an important part of the library's overall customer service and communication apparatus. Not only does it inform the public's understandings and expectations of the University Library, it also serves as a means to collect and measure concrete examples of those understandings and expectations.

### **Core Competencies: What it takes to be Successful:**

#### Finding Empathy and Establishing Rapport

The user-base of our reference services is diverse. It includes people from all of the world, and from a wide variety of backgrounds and status groups, including senior scholars and new students just beginning to understand the academic world. In order to help this diverse public we must continually hone our communication skills so we are able to understand the concerns and issues that accompany the questions we receive. We must adapt our listening skills, lessons, and conversations to accommodate the situations in which they occur, including understanding time pressures, communication issues that append to different communication media, and the multitude of inter-cultural communication issues that present themselves as we seek to provide research assistance.

#### Being Fair, Objective and Impartial

Reference work is professional work that upholds professional standards. As such, we draw on the American Librarian Associations Code of ethics. It requires that we develop ways to provide "the highest level of service to all library users through appropriate and usefully organized resources; equitable service policies; equitable access; and accurate, unbiased, and courteous responses to all requests." And it demands that we "seek to uphold the principles of intellectual freedom and resist all efforts to censor library resources", that we "protect each library user's right to privacy and confidentiality with respect to information sought or received and resources consulted, borrowed, acquired or transmitted", that we refrain from advancing "private interests at the expense of library users, colleagues, or our employing institutions." And that we "distinguish between our personal convictions and professional duties and do not allow our personal beliefs to interfere with fair representation of the aims of our institutions or the provision of access to their information resources." This professional code requires ongoing attention, especially as we evaluate new information tools and new information environments, but it is pursued because it distinguishes the character and quality of our service.

#### Knowing When to be a Teacher and When to be a Research Guide

Reference and Research Assistance constitutes a kind of ubiquitous instruction, one that is often staged at the point of need. Some of the qualities of good teaching, such as lucidity and a relative knowledge of the tools or subjects being taught are required across our reference system, from both our student employees working at public service desks and our subject experts. Yet, reference work is also different from traditional teaching, because in practice, we often learn and discover more about topic by participating in the research process. Reference quality demands that we learn how to be an effective guide when co-searching with our patrons, by showing them the clues which may help them evaluate resources, discover similar items, or adapt their searches as they move forward.

#### Understanding Academic Projects and the Potential of the Library and its Resources in Them

Most questions come in as a question about finding an unknown resource. Through the reference interview, however, one learns that underlying a given question about access, is often a question concerning the best methods and tools to advance some kind of research project. A knowledge of the usefulness and applicability of contemporary research tools, reference sources, collections, both held locally and networked, is essential to providing this assistance. This knowledge is something that must be continually developed by critically reviewing the content and organization of research tools within the diverse fields studied across campus, with the goals of our users in mind.

#### The Ability to Think about Reference as a System

Providing quality reference and research assistance means knowing one's limits and the limits of the patrons. Each of our encounters ought to be contextualized within the array of services available for research help. Developing and improving our reference system allows us to make helpful and proper referrals. Together, knowing we are a community of experts in the Library, within a broader community of expertise across campus, the University system, and beyond, we are both better able to serve our patrons, and better able also to avoid going beyond the limits of our own expertise and experience.

#### Ability to Evaluate the Effectiveness of Reference and Research Assistance Services and Spaces

We must develop effective ways of measuring our work and work spaces, by critically reviewing the capacity, sustainability, quality and helpfulness our provision of reference and research services. These methods include the collection of ongoing statistics on reference transactions; as well more focused quantitative and qualitative temporal studies into our services and spaces. We must periodically review performance, service plans, and our reference infrastructure and environment with the idea of making improvements and advancing the quality of our services.

#### **Definition of Success**

In each point of contact, we strive to satisfy the immediate information needs of our patrons in the most efficient and straight-forward way possible, while also empowering our users for future success. Through each engagement with our Reference and Research Assistance services and spaces, we hope our users emerge with a better understanding of the information environment and its potential. We hope our users come away more confident in their ability to use library systems and resources. And we hope each user leave better positioned to take on the next steps towards the completion of her or his goals.

**Appendix: general description of the weekly impact Reference and Research Assistance responsibilities have on a Research Librarians' work life.**

The intensity of reference work largely follows the academic cycles of the University, which differ depending on which schools and colleges our services are designed to support.

Tasks also vary by position descriptions, so not all of these tasks are required by all members of Research Support Services. These tasks can, however, provide a snapshot of the activities.

- responding to emails queries
- scheduling appointments
- studying and evaluating research tools and reference sources
- helping people on public service desks
- building an effective reference and research assistance environment, online and in the libraries
- conducting consultations and site visits
- training research assistants
- communicating with other librarians about ongoing assignments
- keeping up to date with the foci and objectives of researchers and teachers
- studying research behavior (of students, and faculty)
- coordinating with common knowledge groups across the UC and at other institutions