Reference & User Services Quarterly

The Journal of The Reference and User Services Association (RUSA)

Spring/Summer 2021
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Training, Support, and Connection for Student Library Employees in a Tiered Reference Service Model

"I've Already Googled It, and I Can't Understand It": User's Perceptions of Virtual Reference and Social Question-Answering Sites

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—Adopted by RASD Board, June 27, 1989

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Columns

Features

Looking Back, Looking Forward

Courtney McDonald, RUSA President 2020–21

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On March 4, 2020, just a few days before changes and closures associated with the global COVID-19 pandemic swept across the United States and the world, our previous issue (vol. 59, no. 2) was published. It is accurate to say, though a bit of an understatement, that a lot has happened since then.

This period has surely been one of the most unusual and challenging years ALA, its members, and indeed the world, have ever faced. Like each of you, and like professional membership organizations everywhere, both ALA and RUSA faced challenges of various types through this period. Let me offer my sincere apologies to all of you, our authors, column editors, and readers, for the disruptions and delays in publication and communications for the journal.

In the face of the hardship, difficulty, and loss of life occasioned by the global COVID-19 pandemic, I have been continually amazed and touched by the warmth, generosity of spirit, and dedication to our professional community displayed by RUSA members, RUSA Executive Director Bill Ladewski and everyone at the RUSA office, and by our colleagues across ALA. I particularly want to thank ALA Executive Director Tracie D. Hall and the ALA Executive Board for their support of RUSA.

During this tumultuous time, RUSA stayed the course: we welcomed approximately three hundred new members transitioning from ASGCLA in September 2020; a new Definition of Reference, one of RUSA's key professional standards documents, is now completing the final stages of review and approval through RUSA's Professional Resources Committee; and the RUSA Futures Task Force was instrumental in developing a strategy for long-term financial sustainability for RUSA, touching on areas such as membership engagement, the RUSA awards program, and the RUSA publications program.

Following on the work of the RUSA Futures Task Force, in April 2021 we charged the RUSA Publications Task Force to review and assess the current RUSA publications program. Their goal is to identify key publications and communication needs of the RUSA membership to articulate a sustainable, meaningful content strategy for RUSA publications. Their work will encompass not only communication regarding section and division activities (e.g., RUSA Update, e-newsletter) but also peer-reviewed or edited publications contributing to the literature of reference and user services, such as this one. The Task Force will soon be canvassing the membership for their input, so I encourage you to share your thoughts on this important work via their survey or direct via email to rusq@ala.org. We look forward to hearing their recommendations by spring 2022.

I want to conclude by recognizing the dedicated work of Barry Trott, who is serving not only as chair of the RUSA Publications Task Force, but also as editor pro tem for this combined issue. Barry exemplifies the leadership, collegiality, dedication, and service that is a signature of RUSA, having served not only as editor of *RUSQ* from 2012 to 2018, but also as RUSA president in 2010–11. I've learned so much from his insight and expertise. It has been not only my honor but a very great pleasure to have had the opportunity to work closely with Barry on this issue.

Editor's Note: To facilitate production of this combined issue 3 and 4 of the journal, we chose not to include the professional materials, reference sources, and BRASS best business sourecs reviews. Those reviews will be published in three *RUSQ* supplements this fall on the RUSA Update site (https://tinyurl.com/rusq59-dig-suppl). We thank our review editors, Anita Slack and Calantha Tillotson, and their reviewers for their work.

Reframing Reference as Outreach

Expanding Engagement and Inclusion Through Reference Services

Jade Alburo and Nicollette Brant

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A reference team of librarians and MLIS students from the Charles E. Young Research Library at UCLA embarked on a reference services awareness campaign designed to reach out to marginalized populations in their student body. This column was initially scheduled to be published in spring 2020, but was delayed due to the pandemic.—*Editors*

What do you do when your library's reference desk is not getting as much traffic as you would like? How would you approach marketing your reference services? How can you adapt your services to changing student needs? How can you make these efforts align with your goal of creating an inclusive and safe space for underserved student communities? This article describes work that a reference team, composed of librarians and MLIS students, undertook over an eighteen-month period specifically to raise awareness of the reference service at their library, one of several in a large university. Their endeavors were rooted in their belief in the radical potential of reference services to serve as a vehicle for equity and inclusion, a means for reaching out to marginalized populations who face barriers in fully utilizing library services. The authors will also share the lessons they learned from the process, as well as provide practical steps for creating an outreach strategy.

BACKGROUND/CONTEXT

The University of California, Los Angeles (UCLA) is a large, public university with more than 45,000 students. To serve these students, as well as faculty, staff, and the public, the UCLA Library includes many physical locations. The Charles E. Young Research Library (YRL) is the library for the Humanities and Social Sciences (HSS) and International Area Studies (IAS). It contains research-level collections in various formats and languages. It is also home to two other "libraries" with their own help desks, as well as library administration and a number of library-wide departments. The YRL Research Help Desk (Desk) is the main reference desk in the building; it is staffed by the HSS and IAS departments and graduate student research assistants (GSRAs), who provide semi-extensive reference help. It is located in the shared HSS/IS office suite, a rather hidden location on YRL's A-level, the floor below the entrance level.

In August 2017, co-author Jade Alburo was appointed Interim Reference Coordinator (RC) for the YRL Research Help Desk and remained in that role through June 2019. The

RC is primarily in charge of hiring, training, and supervising four GSRAs and ensuring coverage of the reference desk during scheduled hours, but Alburo expanded the position's scope during her tenure. Co-author Nicollette Brant, then an entering MLIS student, was one of two GSRAs hired in September 2017 and was in that position until she graduated in June 2019. Alburo and Brant, along with co-coordinator Marisa Méndez-Brady (April–December 2018) and the other GSRAs, comprised the Advanced Research and Engagement (ARE) Team. Depending on when they were on the team, they worked in different capacities and combinations to formulate and execute various aspects of the outreach strategy that will be discussed in this column.

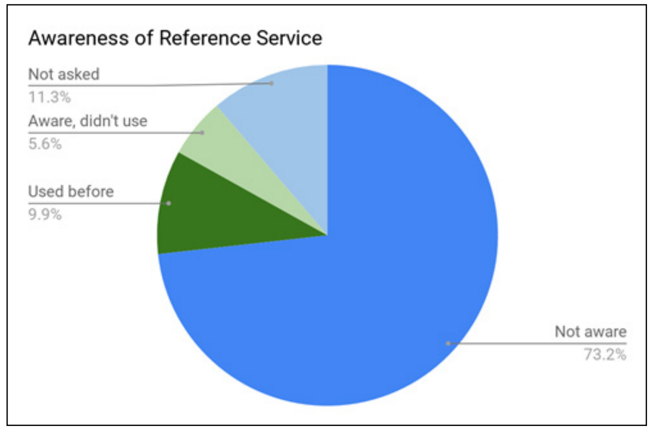

Figure 1. Results of survey on awareness of YRL Research Help Desk

ASSESSING THE SITUATION

When she became RC, Alburo had been at the UCLA Library for nine years, and she believed that the Desk, which had been in its current location for about four years, was too hidden, thus inhibiting its ability to support the research needs of students and other users. To test her hypothesis, as well as to promote the service, the ARE Team set up a pop-up desk in a more visible location on YRL's main floor in late winter quarter 2018; this is in addition to the regular Desk. Though this had been done a couple of years earlier for a few hours over two weeks, Alburo thought that it would be better, for statistical comparison, to have the pop-up desk open during the same hours as the Desk for two weeks.[1] Data showed that, compared to the same time period the previous year, there was a 112 percent increase in the number of transactions. Anecdotal evidence also revealed that people did not know about the service and wished they had known about it earlier.

To corroborate the anecdotes with quantitative data, the team incorporated a quick survey when they did the pop-up desk again for two weeks in mid-spring quarter 2018. When asked if they knew about YRL's reference service, 73 percent of the people who came to the pop-up desk for help indicated that they did not (figure 1).[2] Of those who did know about the service, only two-thirds had previously used it. This demonstrated emphatically that the service was indeed invisible and in great need of promotion.

CHOOSING A FRAMEWORK: REFRAMING REFERENCE

These findings gave the ARE Team the data-informed impetus to create a marketing plan for the Desk. However, before moving forward, we took the opportunity to think about the importance of reference services, what we wished to accomplish with a marketing plan, and what else we wanted to achieve as a team.

We all agreed that reference services are essential. These services—whether in-person or through phone, email, or chat—are ways in which library staff can assist users with their information needs and connect with them directly. The proximity afforded by reference desks, in particular, allows providers to get to know their patrons, learn more about their needs, and gauge the effectiveness of interactions. Reference services are flexible, not just in terms of delivery mode, but also in location; reference can be roving, within the library building or across campus, or embedded in specific classes or departments. We hoped that a marketing plan would increase awareness and patronage of YRL's Desk so that the library can strengthen the information literacy of more users.

Moreover, we adamantly believed that providing reference services is an equity and inclusion issue. People have different ways of learning, and reference provides a mechanism for supporting users who prefer individual attention or who come from backgrounds that emphasize face-to-face interactions. It can also serve as a means of alleviating library anxiety, especially if providers are seen as approachable and empathetic. We recognized the radical potential of reference services to break down barriers to inclusion, which can be particularly overwhelming for marginalized groups in academia. By providing a space for safe and meaningful interactions, we felt that we could support these students' academic success and make a significant difference.

The team members' positionalities as people of color heavily informed our decision to center equity, inclusion, and social justice in the creation of our outreach plan. However, choosing this as our underlying framework was also based on hard data. Statistics show that, unlike most universities, UCLA's undergraduate student population is majority non-White, with 28 percent Asian American and 22 percent Hispanic/Latino.[3] It also has a sizeable (11 percent) international student population, the majority of whom are from Asian countries.[4] In addition, less than half of undergraduates have English only as their first language, nearly a third are first-generation students, and more than a third receive Pell Grants for low-income families.[5] With this kind of diversity in the student body, it is imperative for the UCLA Library to be cognizant of and responsive to their needs.

DEVELOPING OUR STRATEGY

Armed with a shared vision of equity-focused outreach, the team proceeded with the work of creating an outreach plan. Although we already had some ideas about what we wanted to do, we still had to go through several steps before we could finalize our strategy.

Conduct Environmental Scan

Our first task was to conduct a quick and informal environmental scan. As the undergraduate library, Powell Library is the location that has the most potential overlap with YRL in terms of subjects and audience. In order to gain insight into Powell's outreach activities, including target audience, and to ensure that there is no duplication in our efforts, we met with their Outreach Coordinator. We learned that, though they did consider all undergraduates to be their audience, they did have a slight focus on new students, both freshmen and transfers, especially since many of their activities involved participating in campus outreach events.

Since our tentative plans included social media, we also met with the library's new social media manager. At the time this article was written, different locations and departments had their own social media accounts, so we needed to know what his role was going to be; we learned that he would oversee the general UCLA Library accounts. In addition, he gave us much-needed guidance on developing and implementing a social media campaign.

Finally, we looked into YRL's previous outreach efforts. We saw that, though YRL had social media accounts, posts were either infrequent or had ceased. We also learned from staff that there had been sporadic attempts at events, such as research clinics, open houses, and writing nights. However, as YRL did not have an Outreach Coordinator, these tended to be rare occurrences.

Determine Primary Audience

As the research library, YRL traditionally defined its primary users as faculty, graduate students, and upper-level undergraduates in HSS and IAS. In actuality, it supports all users, regardless of university status, affiliation, or subject discipline. For the purpose of developing this outreach plan, though, we had to clearly define our target audience. This is in keeping with the business strategy of market segmentation where customers are divided into smaller groupings with similar characteristics or needs to optimize product development and marketing.[6]

We started by holding a design jam (figure 2) to discuss what unique attributes our specific Desk and library offered our users. The session affirmed that our Desk's specialty is providing advanced research help, including finding and using specialized resources such as area studies materials, primary sources, maps, statistics, etc. As faculty, graduate students, and upper-level undergraduates are the users most in need of this kind help, this confirmed that they remain our primary audience. As our environmental scan showed that these are not Powell's target audience, our work would complement theirs. However, as faculty tend to work directly with subject librarians, we chose to focus on graduate students and upper-level undergraduates.

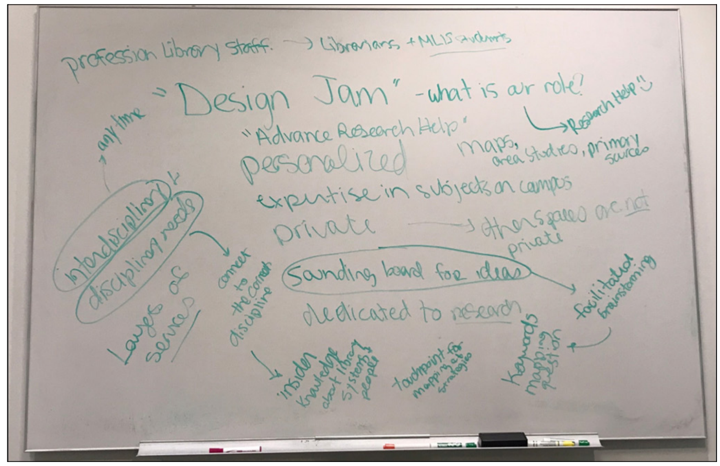

Figure 2. Design jam notes

Define Brand Personality and Identity

The next step was to create a brand identity specifically for the YRL Research Help Desk—this proved to be our biggest challenge. Usually, when developing an outreach strategy, you are doing it for the whole library system or for a specific location. However, the ARE Team only represented the Desk but not other departments in YRL and certainly not the entire UCLA Library. At the same time, our service's very name and our social media accounts do include the library's name, so we had to find a balance between mostly needing to promote the Desk and sometimes having to speak for YRL.

In addition, we felt it was necessary to create brand positioning and messaging for the Desk because studies have shown that students, particularly students of color, do not know the role of the reference desk. According to Dallas Long's study of Latino college students, "they understood that library staff seated at reference desks were available but only vaguely understood when to request assistance or how such assistance could strengthen the quality of their schoolwork."[7] If our outreach strategy was going to center the needs of students from marginalized backgrounds, then we needed to make our role as reference providers clear and separate from the identity of the library as a whole.

We employed user experience design methods to define our brand personality. We brainstormed keywords that reflected the emotional qualities we wanted our brand to convey, which in turn would guide what forms our outreach would take (figure 3). The words we selected were: welcoming, inclusive, safe, and supportive. These values conformed

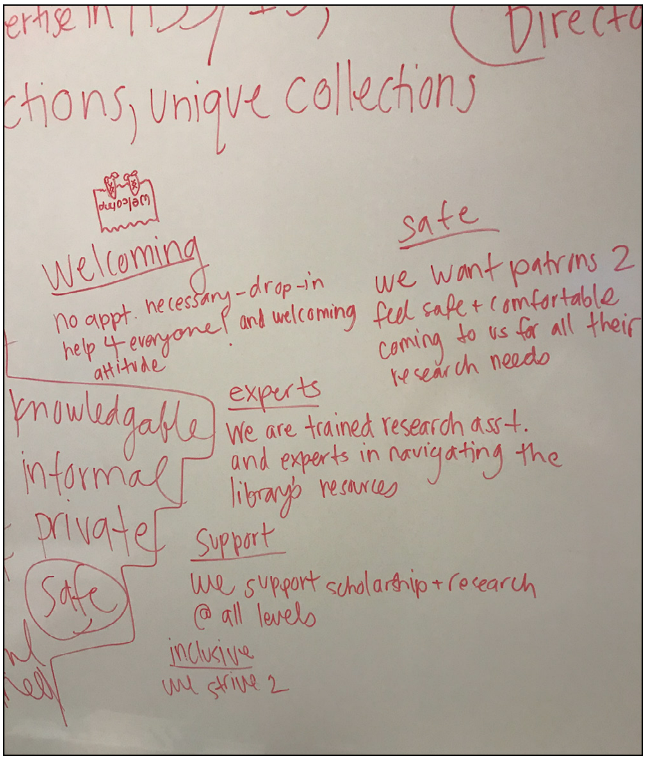

Figure 3. Brand personality brainstorming notes

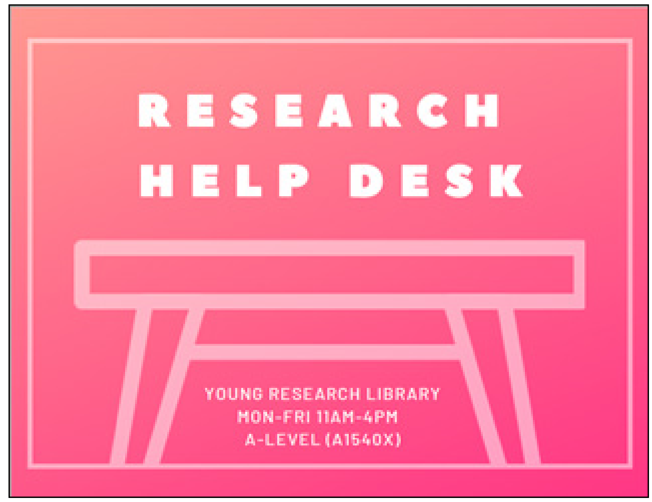

Figure 4. Promotional postcard, front

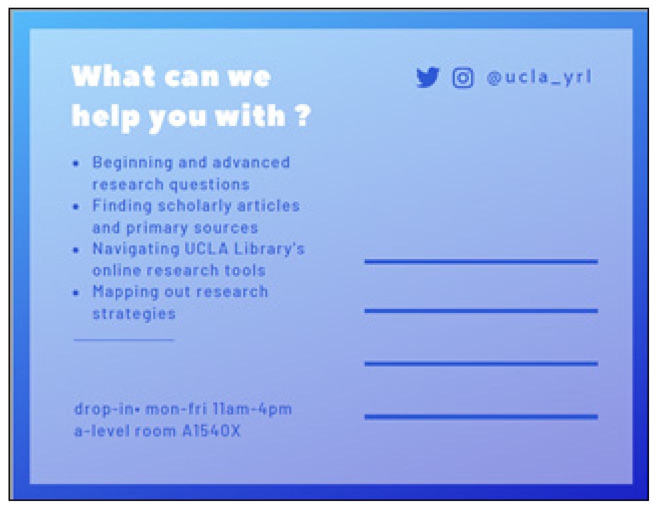

Figure 5. Promotional postcard, back

to our equity-centered framework. We formulated our mission thus: To support student success and inclusion through advanced research help and access to diverse collections in a welcoming and safe environment.

We also decided to strictly label ourselves the "Research Help Desk," instead of using the term reference, to strengthen the identity of our service, eliminate possible confusion (from not knowing what that means), and differentiate our service from other forms of reference services (e.g., digital reference). When we eventually created promotional materials, like the two-sided postcard in figures 4 and 5, the visual image of a desk helped to reinforce our brand identity.

Brainstorm Ideas and Identify Partners

Once we had defined our audience and brand identity, we could conceive of ways to do marketing and outreach accordingly. Since we wanted to foster greater awareness of the Desk, we thought about what kind of promotional materials we wanted to have; we decided that we wanted these to be both informational and utilitarian. For instance, we settled on the postcards because we felt that flyers and bookmarks are easily tossed. While these could also be thrown out, they at least serve multiple purposes—in addition to providing information about where the Desk is and what kind of help we offer, the message section could be used to jot down the contact information for or send a message to their subject librarian, as well as to write comments about the service. For swag in particular, we wanted things that students would actually use so that they could serve as advertising. We settled on phone wallets (figure 6) and water bottles, though we only ended up producing the first.

As users indicated that they wished they had previously known about our service, we discussed ways of reaching out to them earlier. We definitely knew we wanted to make use of social media to reach a wider audience. In order to serve our target groups, we came up with ideas for potential programming that would provide these students with opportunities to learn about our services beyond the confines of the Desk. Throughout this entire process, we identified relevant entities across campus with whom we could partner on existing and new initiatives.

Create Aspirational Calendar and Budget

We took all of our ideas and put them on an aspirational calendar. This allowed us to see all of the ideas in one place, indicate when the activities would ideally take place, enumerate the general steps involved, and gauge how much time and work they would require. This helped us decide what was realistic for us to do with the time and people we had. The calendar was also a place where we could put notes, such as potential partners, necessarily supplies, and estimated costs for said supplies. As we did not actually have any funds, this helped us summarize our prospective activities and calculate total costs so that we could submit a budget proposal to the appropriate people.

IMPLEMENTING OUR STRATEGY

Figure 6. Promotional phone wallet

After doing a great deal of preliminary work in spring and summer 2018, the ARE Team formulated a three-pronged outreach strategy that outlined our objectives and target audience, as well as specified timing/frequency and format of activities (figure 7). We implemented the strategy from fall 2018 to summer 2019.

Outreach Events

Outreach events were intended to address the feedback that students wished they had known about our reference service earlier in the school year or in their academic careers. As there are numerous campus fairs that introduce students to various units and services on campus, we wanted to take advantage of those. YRL, represented by HSS and IAS, participates regularly in the annual Graduate Student Orientation and Fair, so we continued that. Powell Library is active in tabling and representing the UCLA Library at major campus events, so we joined them in some of those; this included participating in True Bruin Welcome (library tours) in fall 2018 and Bruin Day and Transfer Bruin Day (tabling) for newly-admitted students in spring 2019. Because we identified graduate students as one of our target groups and inclusion as one of our goals, we also ensured that we took part in the Equity, Inclusion, and Diversity Graduate Student Welcome Day in fall 2018.

Because it is easy to get lost in the crowd during campus fairs and we wanted to let YRL visitors know our reference service exist, we also decided to do "Welcome Week," when we, along with HSS/IAS staff, tabled outside of YRL (11 a.m.–2 p.m.) during the first week of fall 2018 (figure 8). We envisioned it to be something festive, with balloons and a prize wheel, but we actually had no budget at that point. We had to get creative and worked with Lux Lab, the library's emerging technologies unit, to come up with prizes; we offered posters of selected vintage photos from our *Los Angeles Times* Photographic Archives or an etching on their phone, laptop, or other item. (While some people actually liked the poster, no one wanted to risk getting their phones or laptop etched.)

Targeted Programs

Since outreach events are more general, we wanted to create programming specifically for our target audience of graduate students and upper-level undergraduates. These activities

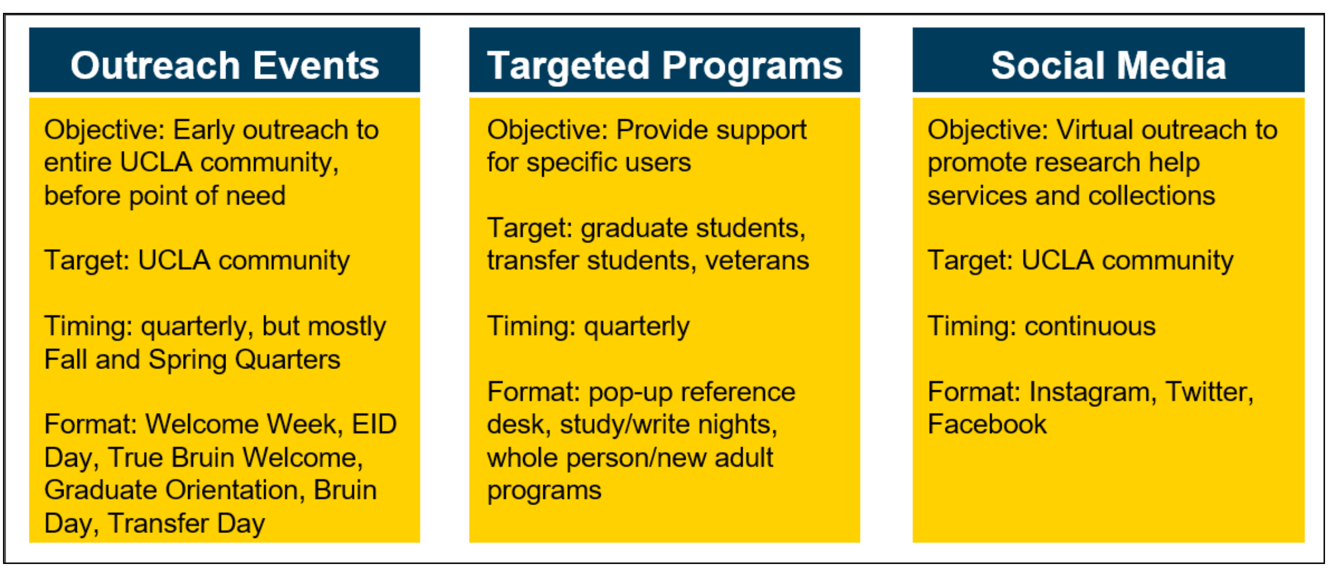

Figure 7. Quick visual of our three-pronged outreach strategy

Figure 8. Library staff and GSRA welcoming students during Welcome Week

Figure 9. Instagram graphic for TSC/VRC pop-up research help

required a great deal more time and effort for planning and implementation.

Pop-Up Research Help Desk

Trying to isolate upper-level undergraduates for outreach purposes is rather difficult, but it was easy for us to reach out to a segment of this population: transfer students. There are so many reasons for working with this group. Transfer students are heavily of color, low-income, and/or nontraditional. They are at a disadvantage because they missed the first two years to learn about what the campus has to offer, but they are also immediately going into higher-level courses for which they might not be as prepared to do the research papers.

We communicated with the Transfer Student Center's (TSC's) Program Director. When we found out that TSC holds a study hall on Wednesdays 5–9 p.m., we viewed this as an opportunity to explore embedded reference with a pop-up research help desk (figure 9). Since the partition that separates TSC from the Veteran Resource Center (VRC) is removed during study halls, this allowed us to reach out to another underserved group. We felt that these two groups are most likely to need reference help outside of our Desk's regular hours (M–F, 11 a.m.–4 p.m.). By going into their space, we made the service accessible and safe. In addition, the desk was staffed by GSRAs, all of whom were students of color and one had been a transfer student and another a veteran, which we hoped created an even greater sense of welcome and approachability. We held our pop-up desk at TSC/VRC in winter and spring quarters 2019. Due to staffing considerations, we were only there 5–7 p.m. during weeks 3–10.

Grad Study Nights

Though YRL is supposed to be a library for graduate students, the more numerous undergraduates have mostly taken over the space, especially after its renovation ten years ago. As graduate students do not have a dedicated space in YRL, we wanted to support them by providing them with a special space and time to study while also offering reference help, stressbuster activities, and snacks. We conducted four study nights at the end of winter quarter 2019 (figure 10), but it was not feasible for our small team to do it again in spring.

#ThrivingThursdays

Though not exactly related to reference services, another program that we did that was intended to support graduate students was the #ThrivingThursdays series (figure 11). The idea behind it was to help the students thrive not just in their studies, but as a whole person. Based on new adult programming that public libraries are doing, this was designed to provide graduate students with additional skills that can help them be more successful while in school and after they graduate (e.g., time management, budgeting or financial literacy, creating resumes or CVs, presentation skills), as well as provide them with a break from their studies, using some of our collections. We did four events during spring quarter 2019.

Social Media

The third aspect of our strategy was social media. While there are some users who prefer face-to-face services and programming, there are others who do not; social media could help us reach that wider audience. We wanted to use it as a way to promote our reference services, as well as showcase our diverse collections and provide additional research- or library-related tips.

Figure 10. Flyer for GRAD Study Night

Figure 11. Flyer for #ThrivingThursdays

We decided that we would focus on Instagram (figure 12) because at the time, that is where most students were (other than Snapchat) but would also use Twitter and Facebook sporadically. We created social media guidelines that specified the use and tone for each platform. We decided on which hashtags to use, such as #databaseoftheweek (featuring a different database each week) and #tiptuesday (tips on using the library or doing research). We also used hashtags #writerwednesday and #fridayreads, as well as international celebrations, national holidays for other countries, author birthdays, etc., to showcase our area studies collections and other diverse holdings.

Because several individuals were involved in creating and reviewing posts, we created a content calendar on Google Docs, which mapped out our posts a week or two in advance. We would then transfer the content to Hootsuite, which automatically published posts to our accounts, as scheduled. We relaunched our dormant accounts in January 2019 and posted on Instagram three or more times a week through August 2019.

LEARNING FROM OUR EFFORTS

Although we only had a very short time to do it, the ARE Team accomplished, or at least laid the groundwork for, what it set out to do. We fostered awareness of the Desk and inclusion for our target audience, which included marginalized populations. We also all learned some great lessons about doing outreach:

- Be intentional.
  - Decide who your audience is, what activities would work best for them, and what time of the school year is the best time to reach them.
- Don't try to do too much all at once!
  - Pick one target group or mode of outreach and do that well before adding on more groups or activities. Focusing on too many things with little time and resources will result in things not being done as well as they could be.
- Be okay with slow growth towards a future goal.
  - It takes a while to make connections and for programs to take root and for people to know about them.
- Start marketing early.
  - Get in contact with those who can post to listservs, etc., well before the event.

Unfortunately, because the ARE Team is no more—Alburo stepped down as RC and the GSRAs either graduated or moved to a different location, these specific initiatives are no longer in place.

Much has changed since this article was written. The Library's locations and departments now have a combined

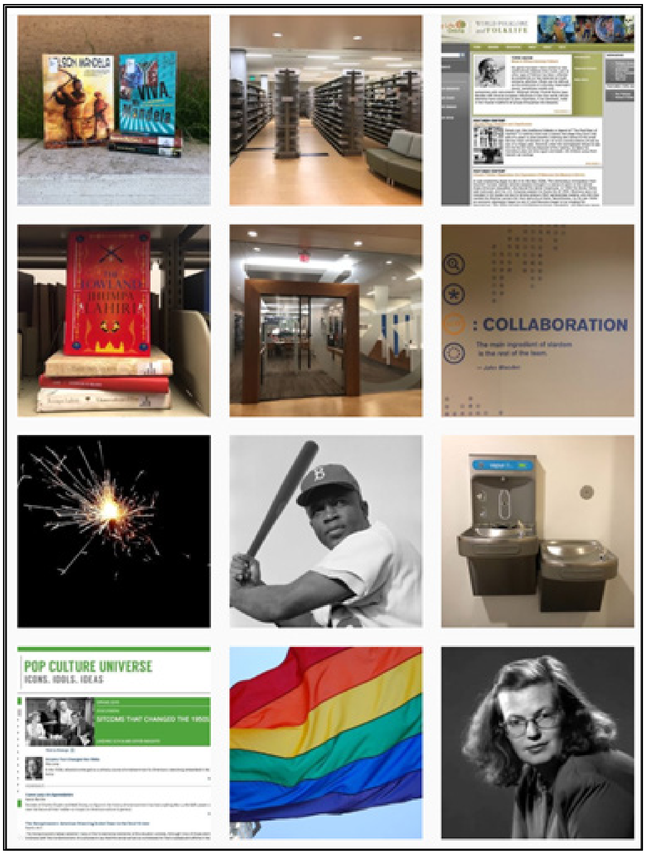

Figure 12. Wall of Instagram posts

social media presence; there are no longer #databaseoftheweek posts, pop-up desks, or grad study nights, but the Library-wide User Engagement team has adapted #ThrivingThursdays into Adulting 101 programs, and Library Communications has sponsored Welcome Week tabling at YRL. As always, things are continually evolving for new times and new ideas.

CREATING YOUR OWN OUTREACH STRATEGY

In this article, we have delineated the steps our team took in creating an outreach strategy for the YRL Research Help Desk. While we have purposefully used our headings to serve as guidelines and our experiences as examples, here are specific questions you can ask yourselves as you work towards developing your own outreach strategy.

- Assess the situation: What is the problem? How do you quantify the problem?
- Choose a framework: How do you want to approach the problem? Is there a specific take that you prefer or for which you are better qualified?
- Develop your strategy
  - Conduct an environmental scan: What are others already doing? What have you already done? What resources are available?
  - Determine primary audience: Which specific group(s) are you targeting?
  - Define brand personality and identity: What qualities or values do you want to convey? How do you want your audience to remember you?
  - Brainstorm ideas and identify partners: What are potential activities you can engage in? When is the best time to do them? With whom can you collaborate?
  - Create aspirational calendar and budget: How many activities can you realistically do with the people and time you have? Will there be costs associated with these activities?
- Implement your strategy: What are the steps you need to take to implement each aspect of your strategy? How are you collaborating with partners? Do you need promotional materials or other supplies? How are you promoting your efforts? Do you need to create a social media calendar? Are you doing any assessment?
- Learn from your efforts: How are you measuring the success of your efforts? What lessons have you learned, and how will you incorporate them into future efforts?

References

1. To minimize disruption on the regular Desk, the team decided to have the pop-up desk only when GSRAs were available to staff it. The GSRAs have librarian or staff back-ups when they are on the Desk, so this meant that these folks would not be back-ups for those weeks. As no GSRAs were available on Wednesdays, the pop-up desk was actually only open for four days during each of the two weeks.
2. As a few users were not surveyed when the desk got busy, this figure could actually be as high as 80%.
3. The figures for Black and Native students are miniscule, though. The rest of the student make up is: 26.0% non-Hispanic/Latino White, 3.0% non-Hispanic/Latino Black/African American 0.2% Native American/ Alaskan Native, 0.2% Native Hawaiian/Pacific Islander, 6.0% two or more races/ethnicities, and 2.5% unknown. University of California, Los Angeles, *Common Data Set* (Fall 2019), https://www.apb.ucla.edu/campus-statistics/common-data-set, 2.
4. University of California, Los Angeles, *Common Data Set*, 2.
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Building a Multi-Format Graduate Student Information Literacy Program

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College and university library instruction programs often focus on providing information literacy instruction for undergraduate students. In this article, Kathy Christie Anders shares how she has developed an information literacy program specifically aimed at graduate students. She discusses the challenges of embedding information literacy into graduate and professional school curricula, particularly across degree programs. She also discusses the advantages of taking a multi-pronged approach to instruction for graduate students, especially in an instructional context that makes programmatic implementation a challenge.—*Editor*

For many years, undergraduate success has been a central part of many conversations concerning academic libraries, and indeed about universities more broadly. Recently, though, there has been growing public interest in the fates of graduate students. From national discussions about job markets for PhD students, graduate student mental health, and graduate student debt,[1] the conversation has moved into the realm of academic librarianship. Academic librarians have long helped graduate students, just as they have undergraduates and faculty members, but in the last twenty years or so graduate students have begun to be viewed as a specific population with unique needs. We see this in the development of professional groups and events focused on graduate students; the biannual Transforming Libraries for Graduate Students Conference started in 2016 and will be meeting for the third time in March 2020.[2] In 2017 the Academic Library Services for Graduate Students Interest Group in ACRL was formed.[3] In 2009, the United States Electronic Thesis and Dissertation Association Conference was founded, sponsored by both graduate offices and academic libraries.[4]

One particular area of interest is in information literacy education for graduate students, a population that consists of masters, doctoral, and professional students. Graduate information literacy needs to be considered in its own right, not only because of the differences between graduate and undergraduate needs, but because of the spectrum of needs between entering masters and advanced doctoral students.[5] Therefore it is helpful to consider advanced information literacy skills and knowledge as increasing with further education and practice. Information literacy, like any other discipline, scales up in terms of specialization and complexity. Graduate students, moving from recent undergraduates to academic or industry professionals, encounter increasingly nuanced and complex information literacy concepts and levels as they move through their education. For example, at the graduate level, students must not only understand the information life-cycle, but where their own research and publication live within that life cycle. Information literacy for graduate students is not just about advanced research, but about scholarly production and publication within a given discipline.

While certain graduate populations, such as those in information science, may view themselves as having advanced information literacy skills,[6] there is evidence to suggest that some graduate students may not be fully proficient.[7] And while it is helpful to consider whether or not graduate students have achieved the proficiency levels necessary for the type of work they are doing, it is also worth investigating what advanced information literacy looks like. The *Framework for Information Literacy for Higher Education* is helpful in that it establishes "dispositions" rather than competency levels, and these dispositions are applicable to all stages of education.[8] Nina Exner successfully shows how the frame "Research as Inquiry" can be used to approach teaching those engaged in original research, such as doctoral students.[9] Given the general integration of creation and context into the *Framework*, there is room to envision how it applies to the seasoned academic professional and the freshman alike.

THE PROGRAM

Texas A&M University is a large public research university. As of the 2019–2020 academic year, it had nearly 15,000 graduate and professional students, and more than 69,000 students enrolled overall.[10] In terms of administrative organization, the Office of Graduate and Professional Students is responsible for graduate student records, dissertation and thesis review, and professional development. In College Station, there are fourteen individual colleges that enroll graduate and professional students, with an additional two such colleges at other locations in the state. Many of the graduate programs are residential in nature, but as of 2020 there are forty-eight distance degrees offered, most of them at the masters level.[11]

In terms of creating information literacy programming for the graduate student population, the University Libraries have implemented a multi-format approach. In addition to liaison librarians who are invited into classrooms, graduate students can choose to participate in our workshops, retreats, and short courses. This structure of programming within the University Libraries is relatively new. The position of Graduate Studies Librarian was created in 2014 in the Learning and Outreach unit, although many librarians in the University Libraries had been working with graduate students for far longer. With the creation of that position came the development of the current program.

Prior to 2014, librarians had been offering course-integrated classes and some stand-alone workshops, depending upon requests and relationships with departments. Subsequent to 2014, the Libraries maintained their previous instruction while piloting retreats, offered in partnership with the University Writing Center, and short courses. Additionally, the Libraries integrated their graduate workshops into the University professional development program for graduate and professional students. One of the benefits of the structure of the program has been that librarians can experiment with new forms of instruction and offer a diverse set of learning formats. This allows our librarians maximum flexibility in developing learning opportunities, and benefits graduate students by giving them choices about how they prefer to participate in instruction.

Workshops

One of the long-term staples of our graduate information literacy program has been workshops. They are generally about an hour long and are taught by librarians and library employees from public services and scholarly communications in their areas of expertise. While not always strictly the case, liaison librarians tend to teach workshops on topics related to their disciplines, and learning and outreach and scholarly communication librarians teach workshops that are broadly applicable to the entire graduate and professional student community. Workshops are popular with graduate students, and library literature shows that they can be effective formats for teaching information literacy.[12]

Graduate workshops require a high level of expertise to teach, so the topics offered depend upon which librarians are available to teach them. In addition to offering workshops that cover how to use disciplinary databases, topics offered in the past five years include:

- Citation management software
- Copyright for both research and teaching
- Data management
- Scholarly identity
- Keeping up with scholarly literature
- International research

These workshops generally intersect with one frame of the *Framework for Information Literacy for Higher Education*, often reflecting one or two knowledge practices. They are clearly focused on information literacy, albeit at a more specialized level. Many of the workshops blend information literacy with scholarly communications, which reflects literature suggesting that for graduate students, becoming adept at information problem solving means learning skills encompassing both scholarly communications and information literacy.[13]

While workshops are generally well-attended, with ten to twenty-five attendees on average, the Libraries participate in a graduate student professional development program to incentivize student attendance. This program is run by our Office of Graduate and Professional Students, and students who attend professional development events earn units that count toward three progressively-tiered certificates. These certificates do not appear on students' transcripts, but they are able to list them on CVs. The Libraries' participation in this program contributes to the Office of Graduate and Professional Students' goal of increasing professional development opportunities for students and gives students a way to indicate the workshops they participate in apart from their degree coursework. This collaboration between university units also provides opportunities for the Libraries to develop additional collaborative relationships with other units that participate, such as the Center for Teaching Excellence.

Short Courses

Workshops, while being easy to offer, are limited in the depth of instruction that is suited to them. There is only so much one can cover in a one to two hour session. To allow librarians to delve into more depth, the Libraries piloted a set of three "short courses," all related to topics concerning data. In these short courses, students signed up to attend classes once or twice a week for four to five weeks. Each session lasted between one and two hours. The intent was to more closely replicate the traditional teaching structure of the university, with students being in cohorts and meeting with the same instructor over a regular period of time. There was enormous demand for the courses, with two courses each having waitlists of more than 150 people. Another was able to accommodate 100+ students and still had a waitlist. This was perhaps due to the popularity of the topics (GIS, data literacy, and data management), but also because the nature of the short courses allowed enough time for students to noticeably improve skill levels in those areas.

While students were enthusiastic about the topics and initial attendance was very high, instructors found that attendance rates dwindled as the courses ran on, such that the final completion numbers were considerably lower than registrations. For example, the GIS short course had a 50 percent completion rate.[14] Students in the course indicated that they were interested, but that it was difficult to complete all of the sessions while managing the rest of their academic workload. Instructors, too, found the short courses very work-intensive. It is worth noting that since the Libraries are not a credit-bearing college, there was no way to offer these short courses for credit or have them appear on transcripts. It would seem reasonable to say that if completion of the short course were reflected on academic transcripts, completion rates would rise.

There is evidence that the cohort-based short course model of information literacy education for graduate students can be very effective.[15] It certainly allows instructors to create learning opportunities that go into far more depth than a typical one-shot workshop, which is beneficial to students because the skills they are developing are complex. We are interested in revisiting this model in the future when we can find a way to better incentivize completion, perhaps by integrating these into the university graduate professional development program.

Retreats

In addition to workshops and short courses, the Libraries host research retreats with the University Writing Center. These retreats are targeted at graduate students who are in the process of writing their thesis or dissertation proposals. They last from one to two days and offer students a chance to research and write together for most of the day. The days begin and end with short presentations about writing and research techniques. Embedded into these retreats are thirty-minute appointments with subject librarians and writing consultants. During an appointment with a librarian, a student might learn more about ways to search for information, how to manage citations, or how copyright applies to their work. We hold these retreats twice a year, with thirty to thirty-five attendees each time. They are incredibly popular, with registrations filling up within an hour of going live.

The aim of these retreats is twofold; first, it provides students the chance to work in a communal program focused on facilitating academic research and writing. Students benefit from being with their peers, and during the retreats, catering is brought in throughout the day so that students can maintain their energy and focus on their work. The second is for students to work with consultants and librarians on stumbling blocks in their research. Their interactions with librarians are generally educational in nature and involve information literacy learning on the part of the students. Students might learn about fair use practices, new information resources, or how to look up recent dissertations that have come out of their departments. In many cases these appointments with librarians during the retreat result in follow-up consultations.

Course-Integrated Sessions

One of the longer-standing ways of incorporating information literacy into graduate studies is through classroom invitations. Much as with undergraduate classes, professors teaching graduate classes request that their subject librarians teach a session for their class either at the library or in their classrooms. At our library, those instruction collaborations are managed and offered by individual liaison librarians, and occur with different levels of embeddedness and integration. In some instances, librarians are teaching conventional one-shots. In other cases they are more integrated into assignments or longer workshops and projects. Library class sessions are the most common form of information literacy instruction at the Texas A&M University Libraries. In the 2019 calendar year, the Libraries taught just over one hundred course-integrated library sessions for graduate and professional students.[16] While there is evidence that graduate students prefer in-person workshops to class instruction sessions,[17] these are still important to teach because they are requested by faculty and can be tailored to specific courses and assignments. Such classes represent some of the Libraries' best opportunities to be embedded in departments and courses.

IMPLEMENTATION CONSIDERATIONS

Lack of Common Insertion Points

Undergraduate information literacy programs have had great success by targeting high-volume lower-level classes for information literacy integration. Introductory composition, first-year experience, and other general education requirements are natural areas where information literacy can be introduced to the curriculum and reach large numbers of students. Education programs can also be implemented relatively easily across departments and disciplines, since general education and introductory classes can be taken by students across a variety of majors. These classes, such as introductory composition, are often administered by one department, like English, making collaborations easier to achieve.

Graduate programs, by and large, do not have a similar type of first-year experience course or pervasive single introductory course. This makes relying on only one type of course-integration difficult. If a first-year or common-course movement for graduate students begins in the future, that would be a natural place to look to embed information literacy. At the moment, however, offering many different types of programming allows academic programs, individual faculty, and graduate students multiple opportunities to increase information literacy skills.

Apart from having a multi-format information literacy program, in the future we may try to integrate information literacy into an entire academic program. Maria Grant and Marlowe Berg's 2003 study indicates that San Diego State University/University of San Diego successfully integrated information literacy learning into all of the core courses for their Joint Doctoral Program in education.[18] While finding a point at which an information literacy program might be ideal, in the meantime targeting individual programs may be another way to systematically integrate information literacy into graduate and professional curricula.

Time after Coursework

While masters and professional students generally are in coursework for most of the time during their degree programs, doctoral students usually spend a considerable amount of time, often years, doing independent research. At this point their main supervision is through their advisor, and after ending coursework they may feel somewhat isolated.[19] To reach students at this phase, it is important to make sure that faculty advisors, departmental graduate directors, and graduate college/office members are aware of the information literacy learning opportunities that are available.

At the Texas A&M University Libraries, we have developed relationships with many of the other administrative and academic support units on campus, such as the Office of Graduate and Professional Students, the University Writing Center, the Center for Teaching Excellence, and International Students Services. Through relationships and collaborations with these offices, we are able to extend our outreach to administrators, advisors, and faculty members who continue to work with graduate students after they have completed their coursework. We also organize learning opportunities, such as retreats and workshops, that are targeted to students completing milestone projects after coursework, such as submitting proposals and dissertations.

Next Steps and Conclusion

There is not one single method of information literacy teaching that we rely on alone in the Libraries. Each has its own opportunities and weaknesses, so relying on one method alone, such as workshops, is not sufficient to reach all graduate students. By maintaining a program that consists of multiple formats, the Libraries have the ability to experiment with different models of education while reaching more students than we could with one format alone. This has afforded us the ability to experiment and innovate while drawing on the strengths of many of our librarians.

The program does not exist on its own; it requires work to inform graduate students and faculty members about the learning opportunities that are available. The program dovetails with our outreach programming to graduate students, which includes orientation sessions, resource fairs, and stress-busting events. Library literature suggests that promotion is an important part of maintaining a successful graduate information literacy program,[20] and we have found that in order to keep up attendance, we have to let students know what we have to offer. In the future, it would be ideal to integrate information literacy more into the graduate curriculum, so that graduate students could be ensured of information literacy learning, rather than taking workshops only if they happen to attend an outreach event or see our marketing materials. It is fairly common for students to say after workshops that they wished they had known about the topic earlier in their graduate careers, but early in their careers they may not know about all of services the Libraries provide, especially given the size of our university and the many offices on campus that target graduate students. We have found that the information literacy program is in demand, since workshops and retreats regularly lead to more consultations with students, indicating the need for additional learning opportunities where students can learn more deeply about the research and scholarly dissemination processes.

As our graduate information literacy program progresses, we will continue to experiment with types of offerings while maintaining our current core. The intersection of scholarly communications and information literacy has been one of increasing interest to our students, and this is an area that will continue to grow in the future, particularly as the Libraries have recently created a new data management unit. Future steps also include expanding our online offerings to make sure that our distance education students have the same opportunities as our residential students do. Academic library services focused on graduate students only continue to grow, both locally and nationally, so we anticipate this being an area of need for a long time to come.

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Using Universal Design for Instruction to Make Library Instruction Accessible

JJ Pionke and Lorelei Rutledge

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Accessibility is of fundamental importance in all classrooms, including the library classroom. In this article, two disability advocates in libraries, JJ Pionke and Lorelei Rutledge, discuss the importance of taking a universal design approach to library instruction. They argue that library instructors should have accessibility in mind at the beginning of the lesson planning process, rather than retrofitting lessons and activities to make them accessible. They also outline the key steps that every library instructor should take before walking into the classroom in order to make their instruction accessible to all learners.—*Editor*

Although libraries are increasingly working to incorporate diversity and inclusion principles into instruction, people with disabilities are often overlooked. As Pionke notes, even though people with disabilities make up 15 percent of the global population, "this [is a] . . . significantly sized population that is understudied and not well understood within the library profession."[1] As a result, many libraries' strategies for supporting patrons with disabilities are limited to requiring the patron with a disability to ask for an accommodation. This strategy rests on the flawed premise of the average student, an assumption which underlies the design of many traditional educational environments. Meyer, Rose, and Gordon point out that much educational practice is based on, "the vision of the normal curve, where 'average students' can be counted upon to experience curriculum and act in an 'average' way."[2] The problem with this premise is that, for many people, disabilities emerge within a specific context that often impedes learning. In other words, the "average student" is a myth. Society generally sees disabilities as singular features of the individual. This article will suggest an alternative view championed by proponents of Universal Design educational models, which is that variation between learners should be expected and that curriculum should be developed with this variation in mind.[3]

Universal Design for Learning (UDL) and Universal Design of Instruction (UDI) are models that are designed to make instruction and learning more effective for all students by eliminating unnecessary challenges or barriers.[4] UDL is a set of principles designed to guide the development of curriculum and instructional materials to better support all students and their individual learning styles and preferences, not only those students labelled as having disabilities. The core principles of UDL are that education should include multiple ways to teach or share information, multiple ways for students to express what they learn and know, and multiple ways for students to connect to the topic in order to engage in the learning process.[5] This framework can be helpful in improving library instruction because of the multivariate nature of engagement that UDL uses. UDI is very similar to UDL but differs in that the principles are specifically aimed at instructors and how they develop materials.

BACKGROUND

Several articles have addressed the provision of library support to students with specific kinds of disabilities, such as Autism Spectrum Disorder (ASD)[6] and visual impairment.[7] Although these strategies are helpful in improving patron experiences in the library, many of them are reactive. In most libraries, patrons with disabilities don't get assistance unless they either specifically ask for an accommodation of some kind through their school's disability office or talk to a library administrator directly about their needs. In many cases, it can be hard for librarians to meet these needs because they may not be aware of them before an instruction session begins. Even if the teacher has been asked by the librarian whether students in the class have disabilities, the teacher may not think they can disclose that information to the librarian or the student might not have disclosed to the teacher. In addition, some students may face barriers in navigating the university or college to receive official accommodations as well. This often leaves the librarian in the dark about what educational methods will work best in a classroom.

In a study of patrons with a variety of functional differences, Pionke found that patrons had multiple frustrations during their library experiences and that these frustrations were often disability specific but had overlap between disabilities. He recommended that libraries work on "developing more empathy for the functionally diverse, empowering the functionally diverse to come forward and speak up, and incorporating universal design techniques to develop better spaces, buildings, and services."[8] Meeting these goals requires proactively integrating educational strategies to support learners who are functionally diverse, before the learners ask for accommodations or even make themselves known as needing accommodation. This is a critical idea because it puts the concept of accessibility front and center during the development of lesson plans, service designs, or building/space (re)development. Many people treat accessibility as an add-on after the initial design phase. UDL and Pionke both advocate for planning with a variety of learners and users in mind when constructing any kind of learning activity, space, or service.

WHAT IS UDI?

To place accessibility at the forefront of instruction, educators can implement Universal Design for Instruction (UDI), which focuses specifically on designing instructional tools and experiences from which all learners can benefit.[9] Rather than being a prescriptive formula for how to design instruction, UDI is a series of principles to consider to design instruction "to be usable by all students, without the need for adaptation or specialized design."[10] These principles include:

1. Equitable use: Instruction is accessible to all learners equally, use equivalency only if there is no other alternative
2. Flexibility in use: Instruction can be used by all learners of varying abilities
3. Simple and intuitive: Instruction that eliminates complexity and scaffolds learning based on what students already know
4. Perceptible information: Information is communicated to the student in a simple and easy to understand way
5. Tolerance for error: Instruction allows for differences in how students learn
6. Low physical effort: Keep the focus on learning by minimizing physical effort
7. Size and space for approach and use: Spaces and tools should be accessible and useful to all students, no matter what their needs or abilities
8. A community of learners: Fosters engagement and communication between learners
9. Instruction climate: Welcoming and inclusive[11]

Since these principles are appropriate for multiple educational scenarios, they are also easily adaptable to library instruction. For instance, Chodock and Dolinger suggested multiple ways to apply the major UDI principles to information literacy, such as creating web-based course guides to supplement materials delivered in class in order to meet the principle of equitable use, which means making instruction useful to and meaningful for students of diverse abilities.[12]

USING UDI TOWARDS ACCESSIBLE INSTRUCTION

Integrating UDI into library instruction sessions can allow librarians to plan ahead of time to support students with a wide range of abilities and learning styles. In particular, using these principles can enable librarians to be responsive to student needs regardless of whether they are providing library instruction. Below are some ways that UDI principles can be used in library instruction:

1. Equitable use: When possible, provide multiple ways to access information in the classroom. Create handouts, LibGuides, or session recordings for students to refer to when they are working on their own. More importantly, provide those materials in accessible formats. For example, if there is a session recording, make sure it is captioned or described depending on the format.

There are many resources available to make sure that tools are accessible; the open web has great examples of how to make sure YouTube captions are correct, how to add alt-text to online images and graphics, or how to make Word documents more easily readable by screen readers.

2. Flexibility in use: Use multiple ways to engage students, such as lecture, question and answer, think-pair-share, videos, and in class activities. Using multiple methods of engagement presents material to students in multiple ways, which increases the chance that at least one of the methods will be compatible with their learning styles and preferences. For example, aim to include at least one portion of every lesson that involves individual work and one section that includes working with other students.
3. Simple and intuitive: Decide ahead of time the specific skill(s) that you and/or the teacher expect the students to learn and avoid including extra hurdles or activities that don't directly lead to students meeting these goals. For example, when teaching students how organize and format citations, do not force students to use a citation manager unless learning to use one is a key learning goal. Instead, demonstrate multiple citation tools and websites and then allow students to pick one that works best for an in-class assignment. If they do not want to use a citation manager and learning to use one is not a required goal of the lesson, do not make them do so. This gives the students choice and clearly adheres to the goals for the session.
4. Perceptible information: Minimize or eliminate jargon where possible and teach concepts in an easy-to-understand way. For example, be wary of using terms like "Boolean logic" without explaining what they mean. When possible, accompany descriptions with demonstrations of how to use tools, which can help make the meaning of the concepts you describe easier to understand.
5. Tolerance for error: Instruction should consider the wide range of student skills, knowledge, and abilities. Build in time for easy and complex questions and provide students who need more help with an opportunity to meet with you or the teacher outside of class.
6. Low physical effort: Allow students to complete assignments or participate in the way that works best for them. For kinesthetic learners, this might mean coming up and writing an answer on the board but for oral learners it might mean talking out an answer. Both ways of providing the answer are correct and should be encouraged rather than discouraged.
7. Size and space for approach and use: Check out the teaching space before you teach and adjust your lesson plan accordingly. For instance, if there are fifty students in a classroom designed to hold fifty, there won't be much room to move around so any activities that require people to move around the room should be eliminated. If students need to work together for the lesson, make sure it is possible for them to adjust the seating so that they can interact. Check out the space so you don't design a lesson that necessitates making people move up and down stairs or to different seats that may not be appropriate for their needs. When possible, make institutional changes that can solve space problems, such as making sure that the classroom furniture can accommodate all types of bodies.
8. A community of learners: Be supportive of questions, comments, and concerns. Encourage students to answer each other's questions and not just rely on the librarian or teacher for information.
9. Instructional climate: Be welcoming and inclusive. Be educated on cultural competencies, GLBTQ+ issues, and disability. Understand what boundaries are, how to set them, and how to enforce them. Boundaries are often discussed in therapeutic contexts in terms of what a person will and will not allow regarding how they are treated. In the context of libraries, an example of setting a boundary might be stating firmly to a patron that shouting is not acceptable behavior and, if they continue, they will be asked to leave. Don't allow or tolerate poor behavior in class because this shuts down conversation and alienates marginalized students.

SHORT CHECKLIST

If integrating all nine elements of UDI into library instruction feels overwhelming, librarians providing information literacy instruction can start small; even implementing these principles slowly can make a big difference to students. Below are some starting points for beginning to work on each of the UDI principles.

1. Make any objects you create (PowerPoints, handouts, videos, etc.) accessible.
2. Eliminate jargon where possible and communicate concepts in bite sized pieces. Don't assume that students understand higher order ideas, even if they are in graduate school. It might be their first time being exposed to concepts like Boolean operators.
3. Become educated about the width and breadth of humanity. Understand the issues and hurdles that students face, being sure to include first generation students, students who identify as GLBTQ+, students with disabilities, and those of differing ethnicities, races, classes, and religions.
4. Be empathetic and compassionate in the classroom.
5. Be creative and don't be afraid to experiment with how you convey information.
6. Assess your efforts so you understand what works and what doesn't. The one-minute paper is an especially easy and useful assessment. One-minute papers usually revolve around two questions: 1. What was something

new that you learned today? 2. What was something you still have questions about? It is an ideal assessment because it is short, to the point, and doesn't take much time.

7. Make your instruction accessible from the beginning rather than trying to retrofit your lesson plans.

CONCLUSION

Accessible instruction doesn't have to be scary or an onerous duty. Thinking about accessibility, especially by using an educational model like Universal Design for Instruction, can help make your instruction more effective for all learners, not just students with disabilities. Using UDI is only one tool in a whole accessibility toolbox. Perhaps the most important thing to consider is that truly accessible instruction does take forethought and being intentional in the design of lesson plans and assignments. As librarians who reach students in many different classes, we can be the gold standard of accessibility and reach all learners where they are.

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Scams and Flimflam

The Other True Crime

Elizabeth De Coster

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This list covers nonfiction on specific famous hoaxes and scams as well as overviews of the topic. Many of the books gathered here began as long-form news articles that were developed into a book. A short section of media items rounds out the column along with great podcast suggestions for gathering background information on what is undoubtedly a scintillating topic for users of all types of libraries.—*Editor*

True crime is a perennially popular category in library collections, and librarians are quick to identify and order a wide range of titles to keep shelves stocked. True crime is an expansive genre, containing many sub-genres and categories. Topically, it may cover contemporary or historic topics and crimes both graphic and relatively mundane. True crime writing targets broad and scholarly audiences and many styles and kinds of crimes. A recently popular sub-genre of true crime is the scam investigation or exposé.

While many popular true crime titles focus on missing persons, serial killings, or murders, scam writing tends to focus on nonviolent escapades like financial fraud, impersonation or identity theft, or forms of legal chicanery. A scam implies intent to deceive or mislead but does not necessarily imply physical violence. Titles about scams, hoaxes, and similar misdeeds appeal to readers who may have exhausted a library's collection of true crime or may find true crime titles to be too dark or violent for their own tastes. Search terms that relate to materials on this topic include "imposters" and "imposture" (from relevant Library of Congress subject headings), fraud, hoaxes, and deception. As such, it may be difficult for patrons to find these titles organically, so readers' advisory or promotional efforts are crucial to expose these titles to true crime aficionados.

The genre has expanded in recent years, possibly due to the success of many popular titles analyzing the 2008 financial crisis or the documentary and subsequent MTV series *Catfish*. Postmortems of financial fraud constitute their own sub-genre of true crime, combining financial analysis with a focus on the personal impacts of fiscal policy. There are plenty of tales of historical hoaxes, but hoaxing in the age of the internet carries its own special intrigue, piquing curiosity in investigators and readers alike. In an era of fake news and disinformation, readers are engaged by stories that explore the gray areas of modern ethics and the ways technology has complicated interpersonal relationships. Many readers also enjoy the "whodunit" element, similar to mystery lovers, trying to stay one step ahead of the scammer.

This list represents titles that either provide a topical overview of the theme or have been published in the last decade and focus on relatively recent escapades, and mixes writings focused on both protagonists and antagonists. Fiction, in literature or media, is not included on this list, nor are audiovisual materials not available in library-friendly formats (e.g., streaming-only movies or other material behind subscription paywalls).

Abagnale, Frank. *Scam Me if You Can: Simple Strategies to Outsmart Today's Rip-off Artists*. New York: Portfolio, 2019 (ISBN: 9780525538967).

Abagnale's earlier works may already be on your shelves, but this most recent title from reformed scammer and inspiration for the film *Catch Me if You Can* skews more towards advice than confession. The author focuses on practical tips and suggestions for avoiding common scam such as phishing emails and compromised ATMs. Abagnale is engaging and straightforward, and includes persuasive anecdotes from his own experiences as well as interviews with experts in a variety of security fields. *Scam Me if You Can* is published in conjunction with the AARP, an imprint that might help this title reach those who are most likely to benefit.

Carreyrou, John. *Bad Blood: Secrets and Lies in a Silicon Valley Startup*. New York: Vintage Books, 2020 (ISBN: 9781524731656).

An in-depth analysis of the rise and fall of scam startup Theranos and its founder Elizabeth Holmes. Carreyrou compiled hundreds of interviews in his examination of why and how Holmes was able to attract so much venture capital, talent, and media attention to her startup. *Bad Blood* places Theranos in context at a nexus of technology, medical needs, and economic forces that made the technology seem important and always just plausible enough. The book is littered with characters, but Carreyrou's tight writing keeps the narrative from sprawling or rambling excessively, and the scientific jargon is rendered distinguishable from the spin.

Goffard, Christopher. *Dirty John and Other True Stories of Outlaws and Outsiders*. New York: Simon & Schuster, 2018 (ISBN: 9781982113254).

A popular example of the multi-format media-spanning work popular in the current era, *Dirty John* started out as an *L.A. Times* piece. From there, author Christopher Goffard translated the work into a popular podcast series, and the story was adapted for a scripted series on Bravo. In this tale of whirlwind romance gone awry, Goffard maintains a sense of suspense that translates to multiple platforms—even if the story is already known, the experience is engrossing. A compilation of Goffard's journalism is available under the above title, with stories ranging from ten to seventy-five pages and covering a broad range of reporting beyond true crime.

Hellman, Peter. *In Vino Duplicitas: The Rise and Fall of a Wine Forger Extraordinaire*. New York: The Experiment, 2017 (ISBN: 9781615193929).

Based on stories originally printed in *Wine Spectator*, Hellman's story of wine forgery routinely discusses price tags in the multi-million-dollar sphere. Rudy Kurniawan scammed big names in the wine world with "forged" bottles of wine, blended generic wines with the labels of pricey French collectible bottles. The elaborate prose, although characteristic of wine writing, won't appeal to all readers, nor will the name-dropping. There is a strong voyeuristic appeal in tales of betrayal from within a specialized community, especially a rarefied group like oenophiles, which does recommend the book. An unaffiliated documentary on the same topic is listed in the media section.

Levin, Josh. *The Queen: The Forgotten Life Behind an American Myth*. New York: Little, Brown: 2019 (ISBN: 9780316513302).

Although most titles on this list focus on recent scams, *The Queen* examines a contemporary stereotype through the lens of an origin story. Linda Taylor became a cautionary tale for politicians based on welfare scams in the 1970s, but allegedly bilking taxpayers may not have been the worst of her crimes. Taylor was an experienced grifter, manipulating lonely or desperate people in her path and expertly avoiding honest answers to questions. Levin's writing interrogates Taylor's life in a contemporary context while analyzing the way she served as a scapegoat for other social fears and anxieties (including racism) in a way that possibly overlooked her most egregious acts.

Seal, Mark. *The Man in the Rockefeller Suit: The Astonishing Rise and Spectacular Fall of a Serial Imposter*. New York: Viking, 2011 (ISBN: 9780670022748).

In another long-form journalism piece expanded into a book, this time originating in *Vanity Fair*, Seal writes in florid, descriptive prose in telling the story of a serial imposter and con man who was eventually caught out only for attempting the abduction of his own daughter. Although Rockefeller's case progressed between the *Vanity Fair* piece and the book, the latter is stretched somewhat thin from the original content. There is plenty of scam to be uncovered with a little more of a gritty edge than some comparable titles, but one of the main elements of the mystery was unresolved at the point of publication (for even a more recent edition), so curious readers are left in some suspense.

Tattersall, Ian, and Peter Névraumont. *Hoax: A History of Deception*. New York: Black Dog & Leventhal Publishers, 2018 (ISBN: 9780316503723).

This highly readable, image-rich overview of "charlatanism, fraud, and fakery" (p. ix) through the ages presents a collection of fifty hoaxes, both historic and with contemporary implications, focusing on facts over trying to find a consistent narrative thread. Individual entries are short and stand alone. Historic topics, some of which may be more familiar than others, are often tied to contemporary themes, like the relationship between gladiatorial contests in the Colosseum and contemporary wrestling. Organized chronologically, the book can be dipped into and out of, read at one's own pace, and then the references followed up on.

Williams, Rachel DeLoache. *My Friend Anna: The True Story of a Fake Heiress*. New York: Gallery Books, 2019 (ISBN: 9781982114091).

My Friend Anna offers an inside look at the experience of being scammed from a victim of heiress impersonator Anna Delvey. What Williams brings to the table is personal insight into how Delvey managed to fool so many people for so long. The ease of reading, and a willingness to be frank about how she herself was repeatedly taken in, makes up for somewhat weaker chapters on the author's personal story. Broad media coverage of Delvey's ongoing fraud and subsequent trial means the story might be familiar to true crime aficionados already, and forthcoming Netflix film on the case means the topic is likely to stay in pop culture for a few more years at least.

Wright, Tom, and Bradley Hope. *Billion Dollar Whale: The Man Who Fooled Wall Street, Hollywood, and the World*. New York: Hachette Books, 2018 (ISBN: 9780316436502).

A whale, in the casino and gaming industry, is a high-stakes gambler with money to spend. At the outset the subject of the book, Jho Low, certainly seems to qualify—the authors provide a laundry list of celebrations and bigwigs that evolves into a laundry list of underhanded deals and back room bargaining. The tale Wright and Hope uncover is similar to other titles on this list, but Low never quite comes together as a focal point, making it difficult to figure out exactly how he was able to wield the kind of influence he did. It is a familiar story of mysterious riches and ostentatiousness, but the authors repeat themselves more than occasionally.

Young, Kevin. *Bunk: The Rise of Hoaxes, Humbug, Plagiarists, Forgeries, Phonies, Post-Facts, and Fake News*. New York: Graywolf Press, 2017 (ISBN: 9781555977917).

On the more academic end of the spectrum is this well-reviewed meditation on the origins and meanings of hoaxes. Poet Young meditates on the haves and have-nots of hoaxing—who scams, who gets scammed, and why the distinction matters. He discusses events both current and historic, and the writing is analytic as well as lyrical. In Young's estimation the greatest American hoax is the existence of racial categories, and many (if not all) hoaxes and frauds can be related back to this false dichotomy. It's a hefty but worthwhile text, perhaps useful to explore as an e-book where the length will not put off interested readers.

MEDIA

Cunningham, Alexandra. *Dirty John*. Los Angeles: Atlas Entertainment, 2018. DVD.

This soapy eight-part miniseries on Bravo fictionalizes the titular story in Goffard's collection (above). The titular character is played by Eric Bana and the protagonist is played by Connie Britton, who received acting accolades for the role. The plot remains mostly true to the story, that of a woman who is taken in by a handsome grifter she meets on an online dating site. The show is probably the weakest link in the franchise, having received mix reviews, but with big-name actors in the main roles and broad distribution on cable and streaming services, there is likely to be demand.

Marie, Jane and Dan Gallucci. *The Dream*. Podcast. https://www.stitcher.com/podcast/stitcher/the-dream.

Stitcher and Little Everywhere's podcast series focused on multi-level marketing sales in the first season, and the second season focused on the "wellness" industry. The reporting team combine interviews with laypeople and experts, alternating between sympathy and skepticism. One highlight of the first season is a confrontational interview between the host and a direct marketing lobbyist, which is offset by more personal interviews earlier in the season with her family members who have participated in direct marketing sales parties. Although podcasts aren't necessarily collection eligible, host Jane Marie is under contract with Atria Books for a book based on the podcast, entitled *Selling the Dream*.

Sour Grapes. Directed by Reuben Atlas and Jerry Rothwell. London: Dogwoof, 2016. DVD.

This 2016 British documentary about the wine impresario who turned out to be fleecing his friends at auction is also the subject of the book *In vino duplicitas* (above). Drawing from contemporary footage and original interviews, directors Reuben Atlas and Jerry Rothwell delve into the world of wine connoisseurs. A scam that can be difficult to parse on paper becomes more understandable once viewers meet fraudster Rudy Kurniawan and his victims and understand the specific context of the scam. While the topic may not be a priori interesting to many viewers, the movie provides a critical perspective on the culture of wine with plenty of tongue-in-cheek interview excerpts.

Genealogy Resources in Print

Anyone who has worked at a public service desk in a library has probably had at least one encounter with a genealogy researcher avidly regaling them with some new fact they learned about their ancestors. Genealogy researchers bring a passion to their efforts that is unmatched, so it behooves libraries to have the best resources on hand. While a lot of the genealogy legwork is done online these days via Ancestry.com and FamilySearch.org, there is still a need for high-quality print resources. At the time of the column's writing, many libraries were shut down due to the coronavirus pandemic, rendering print resources inaccessible. By the time this column appears, libraries will be again serving these passionate researchers with a range of the best print resources to go along with online tools. Author Katherine Pennavaria is Library Director at Thaddeus Stevens College of Technology in Lancaster, Pennsylvania. She is the author of *Genealogy for Beginners* (2020) and *Genealogy: A Practical Guide for Librarians* (2015) as well as numerous columns on genealogy in *Kentucky Libraries*. Katherine has done numerous national and state presentations related to genealogy; topics include genealogy record types, search strategies, and resources the beginning researcher needs to know about.—*Editor*

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Has there ever been a better time to work on genealogy? Just about everybody is spending most of their time at home during the pandemic-inspired shutdown, and family history research, which takes dedicated time and effort, is the perfect project. Unfortunately, most aspiring researchers have limited or even no access right now to library print collections, which potentially could contain just the right book to get them started or help them past a brick wall. This unprecedented situation, where potentially helpful publications sit untouched on library shelves, is not going to last. To prepare for the eventual return to some version of "normal," libraries across the country should consider purchasing the books listed here, in both print and e-book form if possible. All of them are produced by established publishers and have undergone an editing and fact-checking process that most web-original information is not subject to.

Sometimes, genealogy information and advice get out of date, such as reviews of software programs. But best research practices don't change so quickly, and advice about the most effective strategies and steps is likely to hold good for many years. Libraries that possess these volumes will see them circulate again and again as more and more people jump on the genealogy train. It has never been more popular to take up, or more important to get right: everyone, from beginners to advanced family history researchers, needs sound, tested advice.

Note: My own publication, *Genealogy for Beginners* (ISBN: 978-1538125489), was published in February 2020—it is a thorough exploration of the process, the resources, and best practices for a beginner.

GENERAL GUIDES

Croom, Emily Anne. *Unpuzzling Your Past*, 4th ed. Baltimore, MD: Genealogical Publishing Company, 2010 (ISBN: 978-0806318547).

Genealogy research is never easy, but it can be made easier with books like this, which takes a complicated process and breaks it down into steps. Croom is an experienced genealogist, historian, and writer, and has produced several other books, including a workbook to accompany *Unpuzzling Your Past*, *The Genealogist's Companion & Sourcebook*, and *The Sleuth Book for Genealogists*.

Morgan, George C. *How to Do Everything: Genealogy*, 4th ed. New York: McGraw-Hill, 2015 (ISBN: 978-0071845922).

Morgan, one of the co-hosts of the popular "Genealogy Guys" podcast, lays it all out: how to do family history using the most current available records, accessing records archives offline, and using social media tools to discover and share. He also covers the important but sometimes overlooked task of placing newly discovered information into the correct historical context.

Smith, Drew. *Organize Your Genealogy: Strategies and Solutions for Every Researcher.* Cincinnati, OH: Family Tree Books, 2016 (ISBN: 978-1440345036).

Smith is the other half of the "Genealogy Guys" podcast. He addresses the vital issue of getting and staying organized as you pursue family history records and data. The undertaking is essentially a research project, so having a research plan, a file labeling strategy, and an organized workspace will lead to better outcomes. Smith emphasizes the need to determine goals and objectives for research, especially before making any physical fact-finding trip, and keeping track of correspondence. This book can help researchers at any level make the most of their time and effort. It includes checklists and worksheets to apply the book's advice.

Smolenyak, Megan. *Who Do You Think You Are? The Essential Guide to Tracing Your Family History.* New York: Penguin, 2014 (ISBN: 978-0143118916).

Smolenyak's career as a genealogist is many-layered. In this official companion guide to the popular series "Who Do You Think You Are?" (for which she served as chief genealogical consultant), she takes the reader on a breezy, entertaining trip through the highways and byways of family history research, especially the most useful records and how to find them. It is a warm and inviting place to start for the uninitiated, but even experienced researchers can learn some new tricks. Perfect for public library circulating collections.

Szucs, Loretto Dennis and Sandra Hargreaves Luebking. *The Source: A Guidebook to American Genealogy*, 3rd ed. Provo, UT: Ancestry Publishing, 2006 (ISBN: 978-1593312770).

Often referred to as the "genealogist's bible," *The Source* has been around for a while but has not lost its usefulness. The authors intended it as a handbook and guide for finding and using genealogy records, but it is also a tool for newbies and a good refresher for experienced researchers. The book consists of twenty chapters authored and signed by experts in the field, all with recommendations for further reading and illustrations. *The Source* is an essential buy for genealogy collections.

FINDING RECORDS

Colletta, John P. *They Came in Ships: A Guide to Finding Your Immigrant Ancestor's Arrival Record*, 3rd ed. Orem, UT: Ancestry, 2002 (ISBN: 978-1630264703).

Just about every American can trace part of his or her family history to someone who came to the US from elsewhere in the past three hundred years. This book is a useful overview of the documents relating to those arrivals from all over the world. Colletta provides not only the details of which records are useful in researching immigrant ancestors who arrived by ship, but also covers how the immigration process itself has evolved.

Eichholz, Alice (ed.) *Red Book: American State, County and Town Sources*, 3rd rev. ed. Provo, UT: Ancestry Publishing, 2004 (ISBN: 978-1593311667).

Organized by state, this book provides detailed information about county and town records sources along with maps and other illustrations. Of particular interest is the coverage of state and territorial censuses, which sometimes get overlooked by researchers who focus on the better organized decennial federal census. This one belongs on the reference shelf of any library with patrons pursuing genealogy.

Hendrickson, Nancy. *Unofficial Guide to Ancestry.com: How to Find Your Family History on the #1 Genealogy Website*, 2nd ed. Cincinnati, OH: Family Tree Books, 2018 (ISBN: 978-1440353260).

Every family history researcher in the US uses Ancestry—with millions of original records and a flexible search interface, it is the biggest and the best tool available. But getting the most out of what it contains is not easy. This book offers advice, complete with examples and illustrations, for how to use Ancestry's search template and "card catalog" effectively and how to interpret its unique "hint" system; it includes a section on Ancestry's DNA test. Researchers at all levels will find something useful in this volume.

Kemp, Thomas Jay. *International Vital Records Handbook*, 7th ed. Baltimore, MD: Genealogical Publishing Co., 2017 (ISBN: 978-0806320618).

A standard reference resource for genealogy, the *IVRH* provides state-by-state and country-by-country forms for requesting birth, marriage, and death records (what genealogists call the "hatch, match, and dispatch" trio) along with lesser-used records such as passports and Social Security. Readers can scan the forms and print them. Even when forms have evolved or changed, the ones in this book are an excellent place to start, if only to get an address or office name. Libraries will want to keep the latest edition on the reference shelf.

PRESERVING FAMILY PHOTOS AND PAPERS

May-Levenick, Denise. *How to Archive Family Photos: A Step-by-Step Guide to Organize and Share Your Photos Digitally*. Cincinnati, OH: Family Tree Books, 2015 (ISBN: 978-1440340963).

We've all got family photos stashed away—and what better legacy can we leave to future generations than to preserve those photos, both physically and digitally? Some lucky family historians have even inherited older photo collections, precious heirlooms that deserve to be shared with other family members. Denise May-Levenick has been offering her expertise for how best to preserve family photos for many years, first as part of her blog, "The Family Curator," and then with print publications such as this one. This book is a practical how-to for organizing digital photos, scanning and labeling prints, and then sharing the images with others.

DOCUMENTING SOURCES

Jones, Thomas W. *Mastering Genealogical Documentation*. Arlington, VA: National Genealogical Society, 2017 (ISBN: 9781935815242).

Documentation—laying out exactly where you accessed an original source and noting appropriate credit for information and images used— can seem like the "busy work" of research. Admittedly it is not the most engaging aspect of family history research, but it is vital to the quality of the information collected and shared. Documenting sources gives a researcher's work credibility because it allows someone else to verify data and information independently. Without documentation, the information might be true or might be false—there's no way to tell. Every researcher can and should learn to cite and describe sources with clarity, conciseness, completeness, and competence. The book contains exercises with answers to help researchers at all levels learn to do better documentation.

Mills, Elizabeth Shown. *Evidence Explained: Citing History Sources from Artifacts to Cyberspace*, 3rd ed. Rev. Baltimore, MD: Genealogical Publishing Company, 2017 (ISBN: 978-0806320403).

There is no bigger name in the world of genealogy documentation than Elizabeth Shown Mills. She is one of the field's superstars, having pioneered the practice and championed the importance of accurate documentation. *Evidence Explained* is the "bible" of documentation because it covers not just citing sources but analyzing them correctly. Mills, the longtime editor of the *National Genealogical Society Quarterly* and past president of both the American Society of Genealogists and the Board for Certification of Genealogists, makes abundantly clear the relative relationship between sources, information, evidence, and proof. Anyone wanting to share their findings publicly should delve into this book and master those distinctions. Mills has helped a generation of genealogists grow into real historians with her work on evidence and documentation. No library should be without the latest edition of this volume.

ETHNIC HERITAGE RESEARCH

Alzo, Lisa A. *The Family Tree Polish, Czech and Slovak Genealogy Guide: How to Trace Your Family Tree in Eastern Europe*. Cincinnati, OH: Family Tree Books, 2015 (ISBN: 978-1440343278).

Millions of Americans can trace part of their ancestry back to Polish, Czech, or Slovak immigrants who were some of the latest arrivals in the myriad waves coming over from Europe. Because they arrived after the processing workflow included extensive documentation, finding the arrival records for these ancestors is usually easier than looking for arrivals prior to the mid-19th century. This guide takes the aspiring researcher through the process of identifying the town of origin for each Polish, Czech, or Slovak ancestor, provides vital and extremely helpful information about finding and translating non-English records, and even covers the shifting boundaries and complicated history of the parts of Europe they came from. Libraries in cities with populations descended from Polish, Czech, or Slovak immigrants will want to provide this excellent resource.

Beidler, James M. *The Family Tree German Genealogy Guide: How to Trace Your Germanic Ancestry in Europe*. Cincinnati, OH: Family Tree Books, 2014 (ISBN: 978-1440330650).

Millions of Americans have some German ancestry, but delineating those Germanic lines isn't easy because German-speaking people were among the earliest groups to settle America, and they continue to arrive well into the twentieth century. Beidler tackles the challenge effectively and includes research advice for finding German-speaking ancestors who lived in areas of Europe that are not in historic or modern Germany. He also offers help with learning the precise place in Europe that someone came from (almost always the place that person was born) and then explains how to access German records in that place. Especially useful is a section on deciphering German-language records, which sometimes use a peculiar script that few today can read without help. This volume is useful for researchers at all levels and especially appropriate in American locations with large populations descended from German settlers.

Burroughs, Tony. *Black Roots: A Beginner's Guide to Tracing the African American Family Tree*. New York: Fireside Books, 2001 (ISBN: 978-0684847047).

Though somewhat dated, Burroughs' book is still the standard for the unique challenge that is tracing the African American family tree. It's easy to get discouraged by the lack of records prior to the late nineteenth century, but Burroughs makes the task easier by highlighting the special problems facing researchers on this topic. He lays out sensible and effective strategies and illustrates the process with real case histories and covers the unique problems that the researcher will face. The book contains copious illustrations and examples plus worksheets and forms. Indispensable for aspiring researchers with African American ancestry.

Grenham, John. *Tracing Your Irish Ancestors*, 5th ed. Baltimore, MD: Genealogical Publishing Company, 2019 (ISBN: 9780806316178).

Crammed with detailed lists and specifics about record locations all over Ireland, this latest edition covers the newest available information about how to access records online and interpret DNA testing results. It is a tad dense and weighty, and as such might be intimidating for beginners, but for the American family history researcher who has identified his/her immigrant ancestors from the Emerald Isle and is ready to "cross the pond," this volume is a terrific guide to the tricky process of locating Irish records. Grenham's book includes source lists for thousands of towns all over Ireland, and for both Protestant and Catholic church records.

Holtz, Melanie. *The Family Tree Italian Genealogy Guide: How to Trace Your Family Tree in Italy*. Cincinnati, OH: Family Tree Books, 2017 (ISBN: 9781440349058).

Italian records are unusually well-documented by the Family History Library, and they are accessible in huge numbers at the FHL's site. This guide will help with every phase of Italian heritage research, from pinpointing the town in Italy someone came from to working with original-language records online at Ancestry and FamilySearch. There is significant practical advice, including a section on dealing with foundling records in Italy.

Roulston, William. *Researching Scots-Irish Ancestors: The Essential Genealogical Guide to Early Modern Ulster, 1600–1800*, 2nd ed. Belfast: Ulster Historical Foundation, 2018 (ISBN: 978-1909556652).

More targeted to a specific time period and Irish population than Grenham's *Tracing Your Irish Ancestors*, this volume drills down into the complex and fascinating research process for tracing Scots-Irish ancestry (which many Americans have, especially in the South). Ulster is basically the big chunk of Ireland that comprises the north—that is where the Scots-Irish people came to the US from (but not where they originated). Roulston includes information about finding Ulster church records—always a vital records source for European immigrants—as well as business and legal records. The appendices break down the sources available for every parish in the historic nine counties of Ulster between 1600 and 1800, and list more than 500 towns and villages. Anyone tackling their Scots-Irish ancestry will find this book invaluable.

GENETIC GENEALOGY

Bettinger, Blaine T. *The Family Tree Guide to DNA Testing and Genetic Genealogy*, 2nd ed. Cincinnati, OH: Family Tree Books, 2019 (ISBN: 978-1440300578).

Bettinger is one of the biggest names in genetic genealogy, and you can be sure patrons will come looking for his books. This one is a solid win—he takes the reader through what DNA tests provide, how they work, the pros and cons of the major testing companies, and how to get answers to genealogy questions using DNA data. He also covers the slippery subject of third-party sites like GEDmatch and the privacy laws that impact the use of DNA data. This book is routinely recommended by professional genealogists who work with genetic results, along with Bettinger and Wayne's workbook, *Genetic Genealogy in Practice* (see next entry).

Bettinger, Blaine T. and Debbie Parker Wayne. *Genetic Genealogy in Practice*. Arlington, VA: National Genealogical Society, 2016 (ISBN: 978-1935815228).

Think of this as a companion to Bettinger's *Family Tree Guide to DNA Testing and Genetic Genealogy*. It is a workbook with practice tests and answers, which begins by providing a conceptual grounding in the science of DNA testing. The authors then go methodically through the many complex aspects of genetic science and steer the learner toward genealogical conclusions that can be demonstrated with genetic evidence. Someone who just wants a simple interpretation of their own DNA testing results doesn't need this book—the testing companies provide that with the test fee. But if that someone really wants to understand the field of genetic genealogy, this book is a must-read.

SOCIAL/CULTURAL HISTORY

Handlin, Oscar. *The Uprooted: The Epic Story of the Great Migrations That Made the American People*, 2nd ed. Philadelphia: University of Pennsylvania, 2002 (ISBN: 978-0812217889).

This book is older than many of its potential readers—it won the 1952 Pulitzer Prize in history. But it is still a winner all these years later. Handlin brings the reader into the world of the millions who traveled from Europe to America in the late nineteenth and early twentieth centuries—a time after the arrival of the German, French, Spanish, English, Irish, and Scots-Irish settlers who colonized the country and pioneered the frontier. The later arrivals were, on average, poorer and more desperate than earlier arrivals. This book explores the nature of their social and economic realities and delves into the peculiar life that was the European peasant during the great migrations. Sometimes the story is disturbing, but it is always fascinating and eminently readable. This book is essential reading for anyone interested in the immigration phenomenon in the US and should be part of every circulating collection.

Wyman, Mark. *Round-Trip to America: The Immigrants Return to Europe, 1880–1930*. Ithaca, NY: Cornell University Press, 1993 (ISBN: 978-0801481123).

Wyman tells us the other side of the phenomenal success story that was (and is) immigration to American shores. We rightly celebrate our immigrant ancestors, but sometimes forget that we are descended from the ones who stayed. What about the ones who went back? Many times, then and now, immigrants have been encouraged to "go home" by nativist Americans who resented their arrival, and many do just that. This book is an academic study, a historical exploration of the myriad, complex social and economic realities that faced immigrants between 1880 and 1930. Wyman offers well-reasoned conclusions about why life in America simply didn't work out for millions of people who arrived, stayed a while, and then went back home.

Images of America series (Arcadia Publishing, Mount Pleasant, South Carolina)

In this series, Arcadia publishes books of pictorial history for American states, regions, cities, and even neighborhoods. The publisher employs local writers and historians to compile photographs that tell the history of a community and to write the captions and introductions. Every public library in America will find at least one or two relevant volumes for its area, and should consider also purchasing titles for surrounding counties and even states. You can search the Arcadia catalog at www.arcadiapublishing.com/series/images-of-america-books.

A FINAL SUGGESTION

Luxenberg, Steve. *Annie's Ghosts: A Journey into a Family Secret*. New York: Hatchette, 2014 (ISBN: 978-1401310196).

The author was a working journalist when his mother died—six months later, he discovered a long-buried family secret: his mother had a sister who spent her adult life in a mental institution. Though not previously interested in pursuing his family history, Luxenberg decided to use his professional skills to bring the story of this newly discovered aunt to light. This book is not really about his aunt—it is the story of the author's journey to discover the truth about her life. While not a genealogy book per se, Steve Luxenberg's dogged pursuit of the records that unlocked a family mystery makes for a fascinating narrative that will appeal to anyone who researches their own family history.

Universal Design for Learning

Catherine A. Baldwin

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Whether it is an Instruction Services Librarian revising her one-shot lesson plan or a programming librarian designing computer classes for public library clientele, universal design for learning offers a great way to create an inclusive learning environment. Arising out of the field of architecture, UDL offers a variety of teaching methods to eliminate barriers to learning and give all users, students, and patrons the chance to gain new skills. To that end, Catherine Baldwin has selected a range of books, journals and websites that should go in your library's professional development collection, and/or for the circulating collection of your institution.—*Editor*

The philosophy of Universal Design for Learning (UDL) has gained the attention of educators across levels and disciplines as awareness of the importance of effective, individualized learning grows. Inspired by Ron Mace's barrier-free architectural design theory of Universal Design, Universal Design *for Learning* is a strategy of planning curricula to accommodate the greatest number of students, regardless of their challenges and abilities.[1] Just as Universal Design plans for greatest structural access and usability for all users, UDL philosophy benefits all learners, as educators facilitate learning experiences through flexibility, student choice, and often technology.

Based on neuroscience and the role of affect in learning environments, UDL philosophy rests upon three tenets: providing multiple means of *engagement* in material, providing multiple means of *representation* of material, and providing multiple means of *action with and expression of material*.[2] Flexibility along these parameters allows for variability according to individual student needs.

Awareness of Universal Design for Learning is growing, not only within the United States, but also globally. As communication broadens and strengthens between educators within a digitally connected world, research is expanding to include studies of the application of a variety of individualized education methodologies from all regions of the world. UDL is seated among such theories and practices, applied in hopes of providing efficient, meaningful education to all learners.

When researching information regarding Universal Design for Learning, there are many offshoots branching from the topic into other areas of research. It is apparent to begin with scholarship involving the topic of *education*. However, due to the diverse applicability of the philosophy, related topic areas and their keywords should be considered for best results. For example, Universal Design was born of efforts to thoughtfully plan for equal access; therefore, publications regarding *equal access* and the related topics of *special education* and *inclusion* are starting points when researching Universal Design for Learning. *Personalized Learning* (PL) is connected to UDL as well, in light of both philosophies' addressing needs for individualization for each learner. Another theme bound to UDL is *technology*; therefore, one should consider related publications regarding new developments with *assistive technology* and *Artificial Intelligence* (AI). Universal Design *for Instruction* (UDI) is another related term, specifically regarding the planning of flexible, individualized educational experiences within higher education settings. *Understanding by Design* (UbD), *Differentiated Instruction* (DI), *culturally responsive teaching*, *brain-based research*, and *full citizenship* are other terms related to UDL. It is clear that due to the adoption of UDL by many areas within education, applying a combination of keywords (UDL, Universal Design for Learning, technology, assistive technology, learning, personalized learning (PL), education, special education, etc.) may reveal the most relevant resources.

RESOURCES

This column includes a variety of resources, including foundational materials for those establishing a preliminary knowledge of the topic of Universal Design for Learning. Practical resources are also suggested for educators and librarians who would like to quickly utilize UDL principles within a busy school or workday. Digital and print materials are suggested for accessibility and ease of use, and online resources are provided for connecting to current discussions, developments, and communities.

Books

Bracken, Seán, and Katie Novak. *Transforming Higher Education through Universal Design for Learning: An International Perspective*. Abingdon, Oxfordshire: Routledge, 2019 (ISBN: 9780815354727).

Including a foreword by David Rose, proponent of UDL, this text includes chapters authored by several international contributors, many of whom hold previous connections with CAST.org, the Center for Applied Special Technology. As a majority of texts focus upon pre-college students, this book addresses the instructing of young adults. Those interested in Universal Design for Instruction applications for college-age students may gain essential information through this text.

Denning, Christopher B., and Amelia K. Moody. *Inclusion and Autism Spectrum Disorder: Proactive Strategies to Support Students*. New York, NY: Routledge, 2018 (ISBN: 9781138931749).

True to its suitability for all students, UDL is applied to the teaching of students diagnosed with Autism Spectrum Disorder (ASD) within this text. Chapter two is especially valuable in relation to Universal Design for Learning theory by clarifying the basis for applying UDL techniques to this specialized facet of special education. Combining theory and practical application, the authors provide information relative to teaching any student, while also specifically addressing UDL applications to benefit students with ASD.

Gronseth, Susie L., and Elizabeth M. Dalton. *Universal Access through Inclusive Instructional Design: International Perspectives on UDL*. Abingdon, Oxfordshire: Routledge, 2020 (ISBN: 9781138351073).

Reflecting the broadening educational community adopting UDL practices, *Universal Access* clarifies theory and application for students of all ages, disciplines, and abilities. Gronseth and Dalton relate foundational UDL information through an inclusive lens, considering the philosophy and principles through the perspectives of 85 countries. This text is suitable for educators of all levels and disciplines, enhancing its value as an addition to a library collection.

Hall, Tracey E., Anne Meyer and David H. Rose. *Universal Design for Learning in the Classroom: Practical Applications*. New York, New York: Guilford Press, 201. (ISBN: 9781462506354)

Addressing all subject areas within PreK-12 curricula, this text provides educators with theoretical bases and solutions to common learning barriers. Teaching methods, technology, and assessment are covered through succinct, quality writing. Classroom examples demonstrate related concepts, providing clarity and a solid base from which educators may develop UDL-based instruction. Low-tech applications and professional development guidelines for pre-service or experienced teachers are also included.

Meyer, Anne, David H. Rose and David Gordon. *Universal Design for Learning: Theory and Practice*. 1st ed., Wakefield, Massachusetts: CAST Professional Publishing, 2013 (ISBN: 9780989867405).

Foundational experts share UDL insight, research, and experiences from across educational settings in this essential text. Connection to online communities is encouraged throughout the book, extending the resources available to educators through this valuable publication.

Neimann, Theresa D., and Uta M. Stelson, eds. *Challenges and Opportunities in Global Approaches to Education*. Hershey, PA: IGI Global, 2019 (ISBN: 9781522597759).

Academic libraries will benefit from acquiring this text edited by Neimann and Stelson, as the topic of Universal Design for Learning is paired with Personalized Learning (PL), which is a growing movement focusing upon the need for greater flexibility and individuation of learning strategies and experiences for each student, regardless of educational level or national origin. *Challenges and Opportunities* addresses rising global awareness and adoption of UDL strategies, not only as practice, but oftentimes as legal policy.

"Section 3: Global Challenges and Opportunities in Increasing Student Competencies" offers perspectives and policies from various corners of the globe, illustrating a growing consensus for applying UDL as a best practice within various fields of education.

Nelson, Loui L. *Design and Deliver: Planning and Teaching Using Universal Design for Learning*. Baltimore: Brookes Publishing, 2013. Illustrated by Allison Posey (ISBN: 9781598573503).

Nelson offers a detailed overview within a digestible format, including metaphorical examples of concepts and practical classroom applications in regard to relevant educational issues, including Common Core guidelines, assessment, lesson planning, and trouble shooting. The author adopts a comprehensive view of the field of teaching, including information on what, how, and *why* to plan lessons utilizing UDL, by efficiently filling in background information for novice educators while providing clarity for those with more experience. In addition, the author provides real world examples and classroom connections via teacher anecdotes, tables comparing teaching strategies, and references to chapters *within* the book for additional information. Instructors teaching any level or subject would benefit from this book, lending to its high value as an acquisition.

Rapp, Whitney H., Katrina L. Arndt, and Susan M. Hildenbrand. *Picture Inclusion!: Snapshots of Successful Diverse Classrooms*. Baltimore, MD: Paul H. Brookes Publishing, 2019 (ISBN: 9781681252933)

Rapp, et al., analyze four tenets of the inclusive classroom, including Universal Design for Learning, Response to Intervention (RTI), clustering, and embedded instruction methods (p. 597f). The authors' incorporation of UDL with other strategies demonstrates the flexibility of UDL application across student learner populations, regardless of the presence or absence of learning challenges. However, the text aptly demonstrates the special value of applying UDL strategies to the development of an inclusive classroom.

Rapp, Whitney H. *Universal Design for Learning in Action: 100 Ways to Teach all Learners*. Baltimore, Maryland: Paul H. Brookes Publishing, 2014 (ISBN: 9781598573909)

Rapp provides a thorough overview of foundational educational theories, including universal design for learning (UDL), understanding by design (UbD), differentiated instruction (DI), culturally responsive teaching, brain-based research, and full citizenship, thereby illustrating the interconnectedness of these prominent theories. The author also clarifies why UDL should be the base of curriculum planning for students, from early childhood through emerging adulthood. Rapp lists suggested books and other resources for further reading on each topic, and the structure of the book itself outlines the main tenets of UDL, with large sections on the means of representation, means of expression, and means of assessment of learning forming the majority of the text, thereby providing real world applications of the theories.

Rose, David A., and Anne Meyer. *A Practical Reader in Universal Design for Learning*. Cambridge, MA: Harvard Education Press, 2006 (ISBN: 978891792298).

Through this collection of articles and lessons, Rose and Meyer offer classroom applications and solutions for applying UDL principles to teaching pre-college students. It should be noted that any collection of resources regarding UDL will include several publications written or edited by Rose and Meyer.

Journals

With rising awareness of UDL, there exists an expanding number of quality resources addressing the application of UDL principles throughout learning levels and disciplines. Articles addressing Universal Design for Learning are plentiful, however, they tend to be published across a variety of journals and specialty areas, with articles addressing specific applications of UDL for a particular niche. Conversely, journals committed singularly to UDL are challenging to identify.

Journal of Learning Design (www.jld.edu.au/)

One dedicated resource of note is the open access *Journal of Learning Design*, which addresses pedagogical topics related to UDL. The journal is available online and offers articles through 2017.

Journal of Special Education Technology (https://journals.sagepub.com/home/jst)

Part of the family of SAGE journals, the *Journal of Special Education Technology (JSET)* addresses the application of technology within this specialized, yet universal, subset of education. Because UDL principles often employ assistive technology, this journal addresses UDL topics.

Websites

Center for Applied Special Technology (www.CAST.org)

The Center for Applied Special Technology is a nonprofit organization dedicated to education research and Universal Design for Learning principles. Founded and supported by preeminent UDL theorists, CAST is a prominent source of UDL information for a wide array of users. Under the "What's New: Learning Tools" tab (www.cast.org/whats-new/learning-tools.html) are several free digital resources and tools for families, educators, and librarians concerned with providing access. "UDL Editions" is one such resource which includes "classic texts from world literature in a flexible online interface with …supports for struggling and expert readers alike." The "UDL Book Builder" is another resource located within the web page of "Learning Tools," which provides a platform for creating digital books. Also included is the CAST UDL Exchange (http://udlexchange.cast.org/home), a website that combines elements of social media with a traditional site format, enabling educators to utilize and refine the site's existing lesson plans, to create new lessons, and to also share lessons in the spirit of open access.

National Center on Accessible Educational Materials (https://aem.cast.org)

The NCEAM provides resources and technical assistance for educators, parents, students, publishers, conversion houses, accessible media producers, and others, in to provide online tools for learners with disabilities. One of the NCEAM's initiatives is *PALM* (Purchase Accessible Learning Materials) (https://aem.cast.org/navigating/palm.html), created to encourage educators to increase the demand for educational materials of enhanced accessibility. This site may be useful for librarians, as it contains information pertaining to accessible materials and related professional communities.

UDL Center: Medium.com (https://medium.com/udl-center)

Medium.com is a website offering free access to articles on timely issues and topics, with affordable subscription membership unlocking greater access. The site provides thoughtful and varied perspectives on a wide array of topic areas, including education and UDL in particular. Medium hosts the UDL Center site, which is an updated product of the National Center on Universal Design for Learning at CAST.org. This site provides the UDL Guidelines within a clear graphic organizer which includes live links to examples and clarifications of concepts. It also offers links to "checkpoints," or outcomes, for assessing the application of the guidelines. The guidelines page contains a wealth of information on UDL as well as ideas for application at any learning level within any learning environment.

References

1. Tracy Hall, Anne Meyer, and David Rose, "An Introduction to Universal Design for Learning: Questions and Answers," in *Universal Design for Learning in the Classroom: Practical Applications*, (New York: Guilford Press, 2012), 1–8.
2. Scott Lapinski, Jenna Gravel, and David Rose, "Tools for Practice: The Universal Design for Learning Guidelines," in *Universal Design for Learning in the Classroom: Practical Applications* (New York: Guilford Press, 2012), 9–24.

RUSA Books Awards

Listening to the Experts Who Create the Lists for America's Readers

Erin Fishman, Matthew Galloway, Sarah Hashimoto, Edward Kownslar, Lynn Lobash, Donna Seaman, Sarah Tansley, Laurie Tarulli, Barry Trott, Neal Wyatt

***Erin Fishman**, Adult Services Librarian, Cascades Library, Potomac Falls, VA. **Matthew Galloway**, Buyer, Anythink Libraries, Colorado. **Sarah Hashimoto**, Community Engagement Manager, Jackson District Library, Jackson, MI. **Edward Kownslar**, Head of Public Services, Ralph W. Steen Library, Stephen F. Austin State University. **Lynn Lobash**, Associate Director, Reader Services, New York Public Library. **Donna Seaman**, Editor, Adult Books,* Booklist. ***Sarah Tansley**, Branch Manager, Roden Branch, Chicago Public Library. **Laurie Tarulli**, Library and Information Services Manager, Sacred Heart School of Halifax. **Barry Trott**, Adult Services Consultant, Library of Virginia. **Henrietta Verma**, Credo Instruct. **Neal Wyatt**, Reviews Editor,* Library Journal.

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To celebrate the past and present work of the RUSA book award committees, we asked a selection of chairs, vice-chairs, and members to discuss the work that goes into choosing the winning titles and how to use the lists when working with readers. Their thoughtful comments and reflections inform, excite, and invite new ways of using the award lists and expand and enrich advisors' work. The column concludes with a curated list of titles to share with readers.—*Editors*

RUSA's award lists are announced in January, heralding a last expert look at the previous year's best literary efforts. In the sea of award winners and best-of-the-year lists, the RUSA awards are particularly notable because they are selected by librarians, librarians who work with readers, suggesting next great reads and aiding in the discovery process. So important is the reader in this undertaking that written into the award criteria for many is a demand that attention be paid to the reading (or listening, or cooking) experience. Valuing a book because of the ways readers will experience it, interact with it, make use of it—simply enjoy it—is one of the delights of the RUSA award roster.

The process is another. Librarians read these books. They read them in frantic waves of keeping up. They read them in slow delight, forgetting the huge TBR pile awaiting them. They read sections aloud during intense meetings when deciding the winner. In what serves as a vital illustration of our commitment to readers and books, every year dozens of librarians sign up for this work, promising to spend the year reading with an intensity and focus that is largely unheard of in today's frantic and fractured media landscape. Their dedication often goes unnoticed in the fanfare of the announcement, but their work is critical. It creates a link between our profession, the publishing world, and the reader. A connection that ties us into the lifecycle of a book in a way we know to be resonant and meaningful. A connection that has existed in RUSA since 1944 when the Notable Books list was first announced, one that runs in an unbroken but beautifully branching line to a cold January night in 2022 when the inaugural LibLearnX debuts, and once again the RUSA book awards are announced.

These awards rely on the expertise of librarians. Librarians who take their love of reading and go above and beyond to provide critical, thoughtful and meaningful contributions to the creations of these lists. The value of these lists not only provide an ability to read beyond our interests, but to grow professionally and make lifelong friendships. A committee member's role and experience is just as important as the contributions these lists serve to our profession and our readers. This article provides a variety of perspectives and thoughts from professionals who have served on various award committees, reflecting on their experiences, criteria they have used to choose titles, and the many uses these lists have in our work.

THE VALUE AND EXPERIENCE OF SITTING ON COMMITTEES

One of the strengths of RUSA is the collection development and readers' advisory committees, which publish recommended lists to purchase for the general reader each year. I have served on several of these committees in the past twenty years, including the Notable Books Council; The Outstanding Reference Sources; the Dartmouth Medal; the Sophie Brody Medal; and the Reading List. Each committee has a different purpose.

There is a lot of work (and reading) required to serve on the book list committees (between November and January, your magazines, newspapers, and movie queues will pile up!). However, each committee member has different experiences, expertise, and strengths, and the result of a diverse committee is a stronger list for a general audience (and a diverse society).

For example, the Reading List Committee focuses on the best writing from eight different genres (and each genre is its own universe of writers and fans!). Through my experiences on that committee, I learned from the other committee members how to identify "good" writing in each of the genres, as well as the best review sources. For example, before I joined the Reading List Committee, I had very limited experience with the romance genre. However, I learned there is a group of high-quality titles published for each genre every year, and I learned how to identify outstanding romance books (and other genres too). I recommend serving on one of these committees to continue expanding your horizons!—*Edward Kownslar, Head of Public Services, Ralph W. Steen Library, Stephen F. Austin State University, member The Notable Books Council, 2021*

MULTIPLE WAYS TO USE THE LISTS

Conversation Starters

Creating a concise list for so many genres is no easy task. It must include reads for diehard fans and newbies, recognize the ebb and flow of trends, and sometimes even define a novel's place in the genre spectrum. Because of this, the Reading List is best viewed as a whole. Our top picks for each genre are excellent reads that we, of course, believe many readers will appreciate. However, each genre comprises a myriad of subtle flavors. It's here where our short lists shine, capturing other tastes readers enjoy. We're not expecting that every, say, fantasy reader will love every one of our five choices—though they might!—but at least one of the picks will resonate with them. Please take our list as an inspiration, a box of pieces you can riffle through to find that perfect fit for your RA puzzle of the hour. Each piece of the list works as an excellent starting point for the RA consultation. Someone who feels less comfortable recommending within a particular genre can feel confident suggesting these titles. Beyond that, discussion of the five titles will spark a conversation that defines exactly what the reader desires. In this way, the Reading List serves as both the map and the X that marks the spot.—*Matthew Galloway, Buyer, Anythink Libraries, Colorado, chair of The Reading List Council, 2019*

Use Appeal To Introduce Books To Readers

The ALA Sophie Brody Award honors the year's best in Jewish fiction and nonfiction for the general reader. This niche award can sometimes be challenging to use in a general readers' advisory context, but this year's winners can serve a variety of general RA purposes. Our winner, *The Nightingale's Sonata*, can be read by anyone looking for a compelling biography, especially a historical biography of a woman facing challenging times and circumstances. *The Guarded Gate*, one of our honor books, is a timely look at America's immigration past and will appeal to those interested in modern politics or US history. Our final two honor books, *Strangers and Cousins* and *The World That We Knew*, are both fiction titles that can find a wide audience. Readers looking for character-driven and intergenerational family stories will love *Strangers & Cousins*, and Alice Hoffman's magical realism recommends itself in *The World That We Knew.—Erin Fishman, Adult Services Librarian, Cascades Library, Potomac Falls, VA, chair of The Sophie Brody Award committee, 2019*.

Mine the Longlists, The Shortlists, The Winners

Readers' advisory is woven into the very DNA of the Andrew Carnegie Medals for Excellence in Fiction and Nonfiction. The criteria for the awards are straightforward: fiction titles must possess exceptional literary merit; so, too, the nonfiction works, but nonfiction titles must also make a significant contribution to the subject area addressed, and/or make a specialized body of knowledge accessible to the nonspecialist. Committee members evaluate books on their appeal to adult readers who read for pleasure and edification. The Carnegie longlist, released in early fall, presents a robust assortment of titles librarians can feel confident in recommending throughout the year and beyond. The shortlist, consisting of three fiction and three nonfiction titles, is an even handier RA source, and each title is an outstanding book group pick. As the committee selects the two winners, they seek artistic excellence, but also enticing subjects and compelling points of view. Carnegie books must be truly engaging and provocative, works that will entice readers, even those who might not have imagined being drawn to the topic covered or the genre. The hope is that the Carnegies will encourage readers to both deepen their appreciation for favorite topics and genres and to try something different and mind-expanding. For further suggestions, *Booklist* invites each Carnegie finalist to prepare a recommended reading list, unique lists which can be shared with patrons so that they can explore each Carnegie book's world more expansively. These lists can be found on *Booklist*'s website under the feature titles "What (author name) Wants You to Read."

Here are links to the 2021 lists:

- What Ayad Akhtar Wants You to Read
- What Claudia Rankine Wants You to Read
- What James McBride Wants You to Read
- What Megha Majumdar Wants You to Read
- What Natasha Trethewey Wants You to Read
- What Rebecca Giggs Wants You to Read

—*Donna Seaman, Editor, Adult Books, Booklist, chair of the Andrew Carnegie Medals for Excellence, 2020*

Spread the Word About Audiobooks

The audiobook industry continues to boom, and librarians are seeing more and more demand for high quality audiobooks. The Listen List, a collection of the year's twelve most outstanding audiobooks along with listen-alike suggestions, is a great way to get the word out about the year's most notable titles. Here are a few ways that libraries can use the Listen List to conduct effective listener's advisory:

Displays

Displays are tried-and-true and work very well with seasonal themes. October, for instance, is the perfect time to feature past horror titles, along with listen-alikes from the list, too.

Keep up the conversation

Look for opportunities to bring up Listen List titles. It's as easy as saying, "This is really great in audio, too!" It's remarkable how this simple comment opens the door for great audio conversations.

Re-think shelving

Think outside of the box when it comes to shelving. One idea is to file audiobooks next to print books. This is especially fun when you have graphic novel audiobooks, as many graphic novel readers are open to listening, too. Another idea is to move the entire audiobook section so that it catches the attention of potential listeners. At my library, we moved the audios next to the large print, since many of the same patrons benefit from both formats.

Write!

Many libraries publish book reviews or blog about books online. Try incorporating audio reviews, too, highlighting Listen List titles or noteworthy narrators and productions.—*Sarah Hashimoto, Community Engagement Manager, Jackson District Library, Jackson, MI, chair of The Listen List Council, 2019*

Indirect RA

These lists are great for indirect reader advisory. Make a sign that says Librarians Select the Best Books of 2019, put it on a table and surround it with the books on the list. Shelf talkers are my favorite form of collection merchandising. Something as DIY as 3 x 5 cards with 2019 Notable Book printed in Sharpie will do the trick. For patrons who love a good reading challenge, print out the list and let them check them off. If your library works the way mine does, you probably ordered many copies of these books and they have been in steady circulation for the past year and now they are starting to show up on your shelves in multiples. The timing couldn't be better for merchandising these titles recommended by your peers who did a lot of reading last year. Finally, read them yourself; there are some truly special books on that list.—*Lynn Lobash, Associate Director, Reader Services, New York Public Library, vice-chair of The Notable Books Council, 2019*

Feed Your Book Club

A great way to utilize the CODES List: Cookbooks is to host a cookbook book club. Members read and cook from a monthly selection and discuss their opinions on the recipes, stories, and design of the book while sharing samples of what they made. Not only avid home chefs but also folks who are aspirational cooks enjoy reading and attending meetings. There are many types of cookbooks out there, so varying your selections among celebrity chefs, travelogue, cuisine based, gimmick, and how-to titles increases appeal and expands horizons. Take notes and write a collective review of the title or give it a star rating to create buy-in with the group, but most of all have fun trying new cuisine and techniques in the kitchen.—*Sarah Tansley, Branch Manager, Roden Branch, Chicago Public Library, member of The CODES List: Cookbooks, 2019*

Compete Against Wikipedia

Patrons routinely use Wikipedia to get a basic grasp of a subject before trying for more information. They're open to the kinds of clear overviews that are provided in general and subject encyclopedias, but it may not occur to them to give those items a try. The Outstanding Reference Sources list covers topics that are of current and perennial concern to patrons—infectious diseases and conspiracy theories, for example. Why not have copies of some entries available at opportune moments, and be ready to recommend other books on the same topics? Coronavirus will have patrons talking, and *Health and Medicine through History*, edited by Ruth Clifford Engs, and *Infectious Diseases: In Context* edited by Thomas Riggs, will surely offer handy synopses of related topics that could be used to create flyers. Springboard from those to recommending Lawrence Wright's *The End of October*, in which a killer virus stalks humanity. Does your book club read historical fiction? They might enjoy the background provided in *Encyclopedia of Women in World Religions* and could be encouraged to try related classics like Anita Diamant's *The Red Tent*. On the more leisurely side, baseball season can be celebrated using material from James E. Brunson III's *Black Baseball, 1858–1900*, with baseball novels and stat books ready on the side. Lastly, push your humor collection by whetting patrons' appetites with *American Political Humor*, edited by Jody C Baumgartner. Don't forget, all these efforts can work on your website and in your newsletter just as in person.—*Henrietta Verma, Credo Instruct, member of The Outstanding Reference Sources committee, 2019*

Reference Books and Readers' Advisory

Book award lists can be a great tool for starting readers' advisory conversations and getting ideas for new connections between titles and readers. The items on the Reading List or Notable Books List give both experienced and new readers' advisors some jumping off points and also point out up and coming authors to consider. But what about the reference book awards? So many people think that print reference is dead or at least dying. While reference books (other than those RA-focused ones) have not generally been considered as valuable to the work of readers' advisors, there certainly are some titles that are classified as reference books that have a narrative feel or approach and might be read for enjoyment as much as for pure information. These books could easily be in the circulating collection of a public library and provide nonfiction readers with much enjoyment. They can also complement fiction reading, helping to fill in supporting details of place, times, and characters. For instance, one of this year's Dartmouth honorable mentions was *Disability Experiences: Memoirs, Autobiographies, and Other Personal Narratives*, which gathers together an exceptionally interesting collection of first-person glimpses into the lives of persons with disabilities from the fifteenth century to the present. Fascinating in itself, this book also gives readers ideas of other places to look for writing that speaks to their condition. So before dismissing reference books as just informational consider the many ways an avid reader might find them useful.—*Barry Trott, Adult Services Consultant, Library of Virginia, chair of The Dartmouth Award, 2020*

RUSA AWARDS: CELEBRATING DECADES OF SHARING BOOKS

The treasure trove that is the RUSA awards lists dates back nearly eighty years, offering readers and the librarians who work with them a rich collection of titles to browse and explore. To celebrate the lists, we asked librarians who have served on these award committees to pick just a few titles to highlight to readers. This selection includes work from every award but represents only a fraction of the great books waiting to be discovered.

All Clear by Connie Willis, read by Katherine Kellgren (The Listen List)

An Extraordinary Union: A Novel of the Civil War by Alyssa Cole (The Reading List)

Are We Smart Enough to Know How Smart Animals Are? by Frans de Waal (The Notable Books Council)

Blue Heaven by C.J. Box (The Reading List)

Children of Earth and Sky by Guy Gavriel Kay (The Reading List)

Dessert Person by Claire Saffitz (The CODES List: Cookbooks)

Did You Ever Have a Family by Bill Clegg (The Notable Books Council)

Encyclopedia of Embroidery from the Arab World edited by Gillian Vogelsang-Eastwood (The Dartmouth Medal)

Garden Spells by Sarah Addison Allen (The Reading List)

Gods of Jade and Shadow by Silvia Moreno-Garcia (The Reading List)

Heavy: An American Memoir by Kiese Laymon (The Andrew Carnegie Medals)

Homegoing by Yaa Gyasi (The Notable Books Council)

Horror Fiction in the 20th Century: Exploring Literature's Most Chilling Genre by Jess Nevins (Outstanding Reference Sources).

In the Country: Stories by Mia Alvar (The Notable Books Council)

Inferior: How Science Got Women Wrong—and the New Research That's Rewriting the Story by Angela Saini (University Press Books for Public and School Libraries)

Jubilee: Recipes from Two Centuries of African American Cooking by Toni Tipton-Martin (The CODES List: Cookbooks)

Library Programming for Autistic Children and Teens by Amelia Anderson (Outstanding Reference Sources)

Me Before You by Jojo Moyes (The Reading List)

Midnight in Chernobyl: The Untold Story of the World's Greatest Nuclear Disaster by Adam Higginbotham (The Andrew Carnegie Medals)

Mistress of the Art of Death by Ariana Franklin (The Reading List)

Moonglow by Michael Chabon (The Sophie Brody Medal)

Opened Ground: Selected Poems 1966–1996 by Seamus Heaney (The Notable Books Council)

Songs for the Butcher's Daughter by Peter Manseau (The Sophie Brody Medal)

Station Eleven by Emily St. John Mandel, read by Kirsten Potter (The Listen List)

Temporary by Hilary Leichter (The Notable Books Council)

The Aleppo Codex by Matti Friedman (The Sophie Brody Medal)

The House of Broken Angels, written and narrated by Luis Alberto Urrea (The Listen List and, in print format, The Notable Books Council)

The Immortal Life of Henrietta Lacks by Rebecca Skloot (The Notable Books Council)

The Only Good Indians by Stephen Graham Jones (The Reading List)

The Spymaster's Lady by Joanna Bourne (The Reading List)

The Sympathizer by Viet Thanh Nguyen (The Andrew Carnegie Medals)

The Things They Carried by Tim O'Brien, read by Bryan Cranston (The Listen List)

The Tiger's Wife by Tea Obreht, read by Susan Duerden and Robin Sachs (The Listen List)

The Trial of the Chicago 7: The Official Transcript edited by Mark L. Levine, George C. McNamee, and Daniel Greenberg, narrated by a full cast (The Listen List)

The Underground Railroad by Colson Whitehead (The Andrew Carnegie Medals)

The Warmth of Other Suns: The Epic Story of America's Great Migration by Isabel Wilkerson (The Notable Books Council)

The Wind-Up Bird Chronicle by Haruki Murakami (The Notable Books Council)

This list is curated by Barbara Bibel, Sarah Hashimoto, Bill Kelly, Brian Kenney, Lynn Lobash, Sharon Rothman, Joyce Saricks, Jacqueline Sasaki, Sharron Smith, Barry Trott, Henrietta Verma, and Neal Wyatt

RA School

Learning from ILS Faculty

Building upon our "eavesdropping" columns that invite groups of advisors to gather via email and discuss practice, philosophy, and methods, this issue invites us all back to school. Here four ILS faculty gather to consider the key principles of Readers' Advisory (RA) and their philosophy of RA service. They also answer why RA is not taught more broadly and they, of course, have a book to share. Most centrally, in this wide-ranging conversation, their passion for the service and the importance they place upon the activity of reading shines through.—*Editors*

These interviews (which have been condensed and edited) reveal how ILS professors teach and frame RA. They explore how each engages with students to stress the most important relationships the library fosters, the community of readers and the interaction between reader and book. Their answers are illuminating and reveal, at least from an ILS perspective, that the way we currently practice RA might have migrated too far from the reader, stressing too much the apparatus of RA (objects such as booklists, displays, and read-alikes), which they discuss only in passing.

It is worth remembering that when Joyce Saricks and Nancy Brown first began working on their appeal construct, they began framing appeal from a readerly perspective. It was soon clear to both that learning appeal would be much easier if it was book-centered rather than reader-centered, but the early days of contemporary RA never wandered far from the reader. "Tell us," they said to the patrons they practiced with, "tell us what you enjoy." Those answers built appeal.

Since then, if RA has become an active, engaged, and at times, harried undertaking, these faculty members remind us to slow it down, to be mindful of the conversation.

By shifting our focus, even just for a short while, from what we absolutely need to have in our wheelhouse in order to work with readers, to those readers themselves, these ILS professors offer us space to appreciate that much of what we do as advisors is to build small micro-climates of reading, patron-by-patron. Make the reader the heart of the process they tell us, and the rest will unfold.—*Neal Wyatt*

Interviewees:

***Mary Grace Flaherty**, Professor Emeritus, University of North Carolina at Chapel Hill, School of Information and Library Science. **Lisa K Hussey**, Associate Professor, Simmons University, School of Library and Information Science. **Catherine Sheldrick Ross**, former FIMS Dean, Professor Emerita, University of Western Ontario, Faculty of Information and Media Studies. **Paulette Rothbauer**, Associate Professor, University of Western Ontario, Faculty of Information and Media Studies.*

Correspondence to this column should be addressed tod Laurel Tarulli, Librarian and Information Services Manager, Sacred Heart School of Halifax; e-mail: laureltarulli@yahoo.com, and Neal Wyatt, Reviews Editor, Library Journal*; email: nwyatt@mediasourceinc.com.*

OFFICE HOURS: MEET THE PROFESSORS

Tell us about your life as a reader

Mary Grace Flaherty: Teaching the RA seminar, which requires reading a book from a different genre weekly, reminded me how much I enjoy reading as a leisure activity. In recent years, my reading has focused on scholarly literature and keeping up with the news—what a joy to have a curated list of books to choose from, and then analyze and discuss with a class of engaged readers.

Lisa Hussey: My own experience has really helped me to be more respectful because when I was younger my reading interests (sci-fi/fantasy) were not always treated as "good" reading. I really try to stress the idea that "good" reading is whatever someone is reading. A year ago, I had a student ask me how I got so much knowledge about books and how they could do it. I told them that I was older and that it took time. Since then, I've tried to also be as encouraging as possible that this takes time.

Catherine Sheldrick Ross: As a reader, I am eclectic and omnivorous, but from my research with avid readers I know that some other readers are very selective and discriminating. It is very helpful for readers' advisors to understand the enormous variety in the way people choose, read, experience, and value books. In my RA class, one assignment required each student to conduct an interview with the most avid reader they could recruit, their goal being to understand the interviewee's individual reading experience from childhood to the present. The students transcribed their anonymized interviews and made them available for the rest of the class to read and reflect upon. A very common response from students was amazement that these interviewed readers were so different from the student's own reading experience and so different from each other. Reading differing accounts from different readers helped students in the class sharpen their awareness of their own reading preferences and practices. For example, one person may enjoy rereading favorite authors and books, but another may say there are so many wonderful new books out there that they don't want to miss out on a new experience by rereading. One reader facing a problematic situation may want to gain perspective on the problem by reading about characters facing the same situation, whereas another may want to escape their personal situation and live in a fictional world closer to the heart's desire. Moreover, as we reflect on our own reading, we see not only how our reading differs from that of other people; we can see how our own reading differs from itself. It changes from year to year and even from day to day, depending on our age, our personal circumstances, and whatever else is happening in our lives.

Paulette Rothbauer: I have had a long, decades long apprenticeship to reading and realize now, that even, in my early fifties, that I'm still discovering new things about how I read, what I like to read and when, and what it means to be a reader. I have read across genres, and I've learned that I can get pleasure from reading things like cookbooks and knitting manuals, reading that I considered more instrumental than my own understanding of my reading tastes would have allowed me to believe. I also go long stretches without reading much more than news and magazines. I've learned to allow myself to be the kind of reader that I am when I am that kind of reader, to judge myself less, and to just go with it. This influences the way I teach about readers, reading, and RA, as it allows me to bring my own lived experience of being a less active reader, a less committed reader, a reader who is hard to pin down, into our learning, making the absence of judgement about reading habits and reading tastes a ruling principle.

START WITH THE READER. LISTEN TO THE READER.

What are the key principles of RA in your seminars?

Lisa Hussey: I teach RA in both my Information Sources and Services (reference) and a separate RA course. In both cases, I focus on the importance of listening to the user, showing respect for the request, and being open to learning. To me, one of the most important principles of RA is respecting the reader and taking the time to listen to provide the best service possible.

Paulette Rothbauer: I focus on three key principles:

1. Readers (and nonreaders) direct the readers' advisory transaction: so that they determine what counts as reading, and what counts as a good read to them at the moment of the transaction
2. RA encompasses a set of skills (listed below), specialised knowledge, and competencies that can be learned and can be taught, and that require ongoing development, research, resources, and support
3. Public libraries and library workers are key to the promotion of reading, the production of readers, and of the sustainability of reading cultures.

The key elements of the RA skill set include:

1. Knowledge of materials: encompasses collections, publishing news and trends, awareness of different formats and media, reading lists, bestseller lists, genres, social media, RA tools, library catalogues, OverDrive, Hoopla, and more.
2. Knowledge of how and why people engage with those materials: Why do people read? (or watch? or listen to?) What motivates them to make reading selections? To recommend materials to others? What does reading mean to readers? What does reading mean for our communities?
3. Knowledge of how to engage people about their reading interests, preferences, and needs: this encompasses RA skills like conducting an RA interview, or engaging in a

> directed conversation with a patron about their reading/viewing/listening tastes, and needs. Specific skills are: how to bracket one's own preferences and judgements, how to elicit information from a patron that matches our systems, the ways in which we can provide access (e.g., using appeal factors in NoveList, using subject headings for our library catalogues), and how to encourage browsing across all of our systems.

Catherine Sheldrick Ross: The overarching principle that I have stressed in courses, workshops, and publications on RA is to start first with the reader and with what the reader says about the type of reading experience desired. There is no place in current readers' advisory policy or practice for the older idea that there is a hierarchy of reading materials and that it is the librarian's job to push the reader up the reading ladder. The "best book" (or film or other format) for an individual is the one that fits that person's interests, preferences, and situation at a particular time. It's the one that the reader will actually read and enjoy. Therefore, the key relationship is between reader and book. What's at issue in RA work is not the quality of the book on its own, apart from any reader, but the quality of the reading transaction between the reader and the book. Louise Rosenblatt's classic text *Literature as Exploration* (1938/1995), neglected at its time of first publication and then rediscovered, has persuasively made the case for a transactional model of reading. Rosenblatt has argued that readers play a key role in making meaning. The black marks on the page are the same for everyone, but the meanings readers construct depend on their age, their experience and competence as readers, their familiarity with literary conventions, their life experience, and their current state of mind, mood, interests, and preoccupations. Hence the need for readers' advisors to talk to readers.

THE READER CENTERS THE TRANSACTION

What is your philosophy toward the provision of RA?

Mary Grace Flaherty: RA is a cornerstone of library services, and should be treated and considered as such. Having worked as the director of a small, rural public library, I witnessed repeatedly the power of connecting with and engaging patrons through RA. Whether it was through direct interaction, on-going displays dedicated to a certain genre or staff picks, and/or book discussion groups, RA was surely one of our most important and popular services.

Lisa Hussey: RA is an information need, just like any other question. It should be treated with the same respect and effort that is given to any other question or information need. I really don't make distinctions between information needs. I try hard, both in RA and in my information services course, to stress that any question deserves respect. My students, I think, are very tired of me constantly telling them that it's not about them, it's about the person in front of them. It doesn't matter what they think of the question. What matters is that they help the person fulfill the information need.

Paulette Rothbauer: RA services are built upon a foundation that is profoundly relational. They pivot around the relationships between readers and books and other reading materials. Readers also develop reader identities that shift and change depending on what is going on in their lives, so that the provision of RA is always about so much more than connecting a reader with a book.

The identity of being a reader is one of the most stable identities that we can inhabit across our lives. I see this in my interviews with older adults—one of the most harrowing losses for them has to do with the dissolving ability to read, and to make their own choices about what they want to read and when they want to read it. Despite all the ways they might describe themselves over their lifetimes, one of the most enduring positions that they are proud to take up is that of reader.

And I saw this too in my interviews with teens and young adults: they proudly declare that they are readers even when they are still exploring other aspects of their identities. And so, when I say that RA is about so much more than connecting a reader with a book, I think what I really mean is that because RA does connect readers to books, it is has the capacity to connect readers with critical aspects of their own identities, to connect readers to their own sense of who they are and who they might become.

Catherine Sheldrick Ross: My philosophy of RA provision follows from the recognition that reading is a transaction where both elements in the relationship are important: the book and the reader. The more readers' advisors know about popular genres and their appeals, the better, which means they should use the professional RA tools that are increasingly available. But this book knowledge and familiarity with professional tools can be drawn on appropriately only *after* the readers' advisor finds out, from talking to the reader, what kind of reading experience is wanted. A well-conducted readers' advisory interview is needed to uncover elements that a reader generally enjoys in a satisfying book (e.g., eccentric, quirky characters or world-building or a deeply realized sense of place or edge-of-your seat suspense). But it can also be used to find out from readers something about their current situation and mood. For example, a reader who normally looks for densely written historical fiction along the lines of *Wolf Hall* might say that during a current stressful period that what she wants is a life-affirming, upbeat book guaranteed not to blindside her with unexpected and harrowing disasters. In a nutshell, the reader gets to choose.

LEARN THE COLLECTION

How do our collections support the conversation?

Mary Grace Flaherty: In the Seminar in Popular Materials we examine the place of popular materials within society and within libraries. We cover the different types of genres and sub-genres (including background, history, key books, current awareness, prizes, awards, and specific libraries with outstanding collections), their corresponding appeal factors, how they might overlap and/or have changed over time, and special issues or challenges. We also practice conducting RA interviews and presenting book talks so that students learn how to help connect readers to the literature they wish to read.

Lisa Hussey: It is important to have an understanding of genres on multiple levels, such as knowing the "big" genres, knowing some of the seminal authors and works, recognizing the sub-genres, and crossover works. RA requires an openness to learning about all reading, not just what you like, willingness to ask questions of others, taking the time to do some work like reading reviews, looking over new books, and being outside of your comfort zone, but still being as helpful as possible.

LISTEN. UNDERSTAND. PAIR.

What is the end goal of RA?

Paulette Rothbauer: To support and sustain an active culture of reading in the world, to support reading as an unique social good.

Catherine Sheldrick Ross: The goal of RA should be to provide a reader-centered service that respects readers' choices. The reader looking for a "good book" gets help in narrowing things down from an overwhelming number of possible materials to a much smaller set that could actually provide the type of experience that the reader wants. Effective readers' advisors get readers talking about critical elements in books they have enjoyed in the past as well as about what kind of experience they are in the mood for reading right now. The job of the readers' advisor is to understand enough about the individual reader's current preferences to be able to select from the thousands and thousands of books available a manageable few that are likely to provide the experience that the reader wants.

Mary Grace Flaherty: To match a reader with a book that they will relish (or at the very least find engaging). By this I mean being able to tease out the appeal factors that resonate with a reader and recommending an item based on that interaction.

RA IS FOUNDATIONALLY IMPORTANT

What do we all need to keep in mind?

Catherine Sheldrick Ross: Successful provision of RA needs to be recognized and celebrated as one of the library's most important roles. An accumulating body of research is converging on the importance of voluntary leisure reading, or pleasure reading, in the making and sustaining of confident readers. Libraries need to toot their own horn more to let library users know that providing RA service and personal advice is something that they do and want to do. No one asks for a service if they don't know it is available.

Mary Grace Flaherty: Appreciate the nuance of appeal factors and cross-over among genres.

Lisa Hussey: There is an effort that is part of good RA, doing things beyond just knowing the seminal authors in a genre, but learning more and being able to listen.

INSIDE THE ACADEMY

It is the rare librarian who gets to take a focused RA class while earning her degree and even a unit on RA can be hard to find in a broader course. Once out of school, advisors feel this lack of education keenly and it is a common call from those practicing RA to increase RA education. So why is it not taught?

Paulette Rothbauer: I think the logic of the argument that "libraries aren't just about books anymore" has had a consequence for how ILS faculty and students imagine the work of public librarianship, and perhaps, too, school librarianship. There is probably a link here in terms of what gets prioritized for hiring in ILS programs, what gets prioritized for professional hiring, and what gets prioritized for large-scale research funding competitions.

Lisa Hussey: To begin with, it is not stressed as much as other aspects of the profession. It might be seen as part of 'soft skills' which are not always as valued. It may also be perceived that RA is covered by YA and Children's LIS and isn't needed in a more general sense or that a general RA course will have too much overlap. Also, it's not as 'sexy' as topics like digital humanities or data mining.

Mary Grace Flaherty: Schedules don't allow for it. Many ILS programs are thirty to thirty-six credits, which requires students to concentrate on requirements rather than electives. In addition, ILS programs train students for a wide variety of information settings where RA may not be readily applicable (e.g., in health sciences library settings). It is not a common primary research focus for many faculty members.

A SUGGESTION FOR SELF-TRAINING

Given the lack of opportunity to take a focused RA class, what are some options for self-training?

Paulette Rothbauer: Self-training could start with setting reading challenges for oneself: reading across genres, authors, formats, and could continue with engaging with reading and publishing communities whether in real-life or online. Committing to learning more about why people read might mean asking yourself questions about your own reading or asking your friends and family about theirs. And then, really listening to the answers about what reading means, what would help in terms of connecting people with what they want to read. [Editor's Note: the book *Reading Still Matters: What the Research Reveals about Reading, Libraries, and Community* by two of the contributors to this column, Catherine Sheldrick Ross and Paulette Rothbauer, (as well as Lynne McKechnie) is a key resource to consult when learning RA].

Catherine Sheldrick Ross: In a chapter on the RA interview in *Conducting the Reference Interview*, 3rd ed. (2019), I provide a role-playing exercise in which librarians in pairs practice their skills in finding out what the reader wants to read. The person who plays the role of the reader generates in advance some fairly detailed scenarios that profile different kinds of readers and different situations. The person who plays the role of the librarian has at hand a copy of a list, "Some Questions for Readers' Advisors," which provides a number of tested questions that perform specific functions in the interview, namely questions to get a general picture of reading interests; to determine current preferences; and to understand the reader's situation and what he or she wants from the book.

The reader starts off the role-played interview by saying, "Can you help me find some good books?" but provides additional details only as specifically prompted by questions by the librarian.

To find out what the reader means by "good books," the librarian picks and uses appropriate questions from the list, such as: "So that I can get a better idea of what you like, can you tell me about a book you've read recently and really enjoyed?" "What did you enjoy about that book?" "What would be an example of something you *don't* like and wouldn't want?" "What are you in the mood for today?" "What do you want to get from this book" and "What kind of reading experience are you looking for?" The librarian doesn't just rattle through a list of questions but listens carefully to the reader and asks questions that follow from what the reader has said. After the interview is completed, switch roles. After each role-play, the actors should discuss how they felt about the interview from their perspective and then invite comments or suggestions from observers, if any.

ON MY SHELF

To close, each advisor has a book to share

Editor's Note: These descriptions, both in their level of detail and their focus, reveal the result of a career spent thinking about reading and the reader. They illustrate what advisors might wish to model. These are readers who have a deep and thorough understanding of what reading means and offers in their lives, who understand appeal, and have realized and can articulate what they require from a book to meet their needs of a moment, and of a lifetime.

Mary Grace Flaherty: I recently picked up an advance reader's copy of *The Sweeney Sisters* by Lian Dolan at the PLA biannual conference. It was a highly enjoyable read about a trio of sisters from Connecticut, each with her own quirks and appeal. Having grown up in a household with seven sisters, I found the characters relatable and the family "drama" engaging. The coastal setting was appealing, and description of the summer seaside was well drawn.

Lisa Hussey: I recently read *Golden in Death*, the fiftieth book in J.D. Robb's In Death series. This is actually a series I started twice. The first time, I stopped after the fourth or fifth book. They seemed too formulaic for me and I was able to figure out the killer fairly easily. However, in preparing for a lot of travel over one summer, I decided to try again and ended up falling in love with the series. It does start out in a formulaic way, but after about the fifth book, the characters really develop and I was hooked. J.D. Robb does an amazing job of building a strong woman detective, Eve Dallas, who has a history of trauma, which she is always working through. This, more than anything, is what makes this series powerful to me. Almost against her will, Eve builds a life with her husband, creates a family of friends, which continually surprises her, and is always dealing with her past as she moves forward. It is one of the few cases I've seen where a trauma survivor is allowed to be both strong and still vulnerable. The In Death series is a good fit for anyone who enjoys good mysteries, romance, and a futuristic setting. And, if you start now, you have fifty books to work through until the next one comes out!

Catherine Sheldrick Ross: Recently I read and really enjoyed Elizabeth Strout's latest book *Olive, Again* (2019), in which the Burgess brothers and wives appear in one of the short stories, "Exiles." So now I am part way through Strout's novel *The Burgess Boys* (2013), which focuses on two very different brothers, Jim and Bob Burgess, who leave Shirley Falls, Maine for New York City. Early in the novel, the narrator remarks about one of the characters that she had "perhaps her first understanding of the prismatic quality of viewing people." For me, a key appeal is Strout's ability to show her characters as seen from different perspectives, refracted through the eyes of different perceivers. In *The Burgess Boys*, there are multiple perspectives: things as seen by longtime Shirley Falls residents; by New Yorkers; and by Somalis who have come to Shirley Falls as migrants escaping from strife at home.

Paulette Rothbauer: Recently, I read Caroline Van Hemert's memoir *The Sun is a Compass: A 4-000 Mile Journey into the Alaskan Wilds*. I loved it. It is a classic adventure story. The author and her partner travel from Bellingham, WA, through British Columbia and the Yukon, to Alaska. They travel by canoe, raft, hand-crafted rowboat, and by ski and on foot. While her narrative does provide reflections about her life (e.g., should she take that academic job in the city, should she start a family, how will she cope with her father's Parkinson's?) it is also a glorious recounting of the robust elements of the journey itself, in all its wild and natural splendour and with all of its dangers (bears! drowning! storms! stampeding caribou!). It is fast-paced, and action-packed, and the icing on the cake is that Van Hemert is also an ornithologist and her memoir includes snippets of information about migratory birds, and her specialization, black-capped chickadees. So for me, the appeal factors include genre (adventure memoirs, life stories of women); its descriptive and engaging writing style; the location/setting of Alaska and northern regions; as well as the subjects of wilderness adventuring, science, animal migration, and birds.

EDITOR'S NOTE

Catherine Sheldrick Ross died on September 11, 2021, just as this interview was in its final review for publication. Her death is an immeasurable loss to RA scholarship. Advisory librarians relied not only upon her expertise in the field to expand their understanding and on her rigorous standards of work to set expectations to follow but also on her generous spirit and her excitement about sharing thoughts about readers and reading. Her passion and scholarship made our work both possible and better. "Finding without Seeking: What Readers Say about the Role of Pleasure-reading as a Source of Information," "What We Know from Readers About the Experience of Reading," and *Reading Matters: What the Research Reveals about Reading, Libraries and Community* (co-written with Lynne [E.F.] McKechnie and Paulette Rothbauer) are mainstays in the field.

It is not only on the subject of readers and reading where Ross's contributions are critical. She led the way in reference studies as well. Of particular note to *RUSQ* readers, she earned the Reference Service Press Award four times for the most outstanding article published in *RQ*/*RUSQ*. Her winning articles are:

- "The Reference Interview: Why it Needs to be Used in Every (Well, Almost Every) Reference Transaction."
- "So Has the Internet Changed Anything in Reference? The Library Visit Study, Phase 2."
- "Negative Closure: Strategies and Counter-strategies in the Reference Interview."
- "Flying a Light Aircraft: Reference Service Evaluation from a User's Viewpoint."

Catherine's many colleagues will deeply miss her voice and guidance, expertise and generosity, sharp mind and love of books. We send her friends and family our deepest sympathy and thank her for all she has done for the fields we love. A century from now she will still be studied, and her work will still guide the way, so critical and significant is her research.

Readers' Advisory and the Pandemic

Lessons, Connections, and Vital Services

Lucy M. Lockley, Gregg Winsor, Kaite Mediatore Stover, David Wright, Barry Trott, Stephanie Anderson

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The pandemic and resulting quarantine changed how libraries operate, including the provision of readers' advisory (RA) service. Access to print titles initially came to a halt, rendering many users' holds lists irrelevant, while queues for some e-books grew longer and longer. Readers lost the ability to browse and discover the physical collection, and many took up, for the first time, an e-reader to access books while libraries were closed.

Advisors found ways to aid readers in these difficult circumstances. On Zoom, Twitter, and Facebook, through their websites and newsletters, over the phone and via email, advisors continued connecting readers to books. Their work has created a new resurgence of RA, at the very moment readers had time to re-center on their reading lives. What we have discovered through this hard work and focus should not be lost. There are lessons here to hold onto and learn from.

Virtual book groups have taught us that physical attendance is a burden that stopped many readers from joining the conversation. Once they could be part of the discussion without having to rush home, change clothes, get a meal on the table, arrange for child care, and drive to the library and park, attendance jumped. It turns out the actual and metaphorical time costs of participation are keeping libraries separated from a significant portion of their user base.

We saw this not only in the rise of book group participation but also from literary programming. Virtual events such as Book Expo suddenly had thousands watching a program (both live, and significantly, via asynchronous viewing) when in prior years if a tiny fraction of that number gathered in a room it would be counted as a blockbuster. Of the many lessons to be learned, the need to create programs that allow for remote participation and viewing on readers' schedules should top the list.

Worth stressing to ourselves, putting in every annual report, and making a special presentation to every library board in the nation: the affirmation we received of RA service itself. As readers isolated themselves, they found solace in their connection with a librarian ready to listen and chat about books. Form-based and phone-based RA created a link with the community and proved its abundant value every day, as patron after patron commented on how grateful they were for the service.

We have learned that our books stayed in constant demand, along with RA expertise. Readers turn to us for the joy and necessity of stories and for human connection in the common hour and, essentially, in the uncommon one too.

While the conversation below took place in the fall of 2020, it is September 2021 as this column goes to print, and it is still unclear when it will be safe for every reader, no matter their age or health condition, to venture back to our physical libraries. When that day arrives, we need to keep in mind the lesson the pandemic has taught us: RA is essential.

Stressing this fact and sharing their stories—from a service perspective, a cataloging perspective, and a collection development perspective—six librarians have collaborated here to detail their experiences of RA during the pandemic.—*Editor*

SURVEYING RA AND SOCIAL MEDIA

Readers' advisory is usually thought of as an active (or passive) one-to-one interaction between library staff and customers; a way for the library to help an individual find something new to read. And it still is, no matter whether the reader comes into the physical library or is searching online. But the pandemic and lockdown has made it more vital than ever that libraries take advantage of and expand their means for connecting with readers wherever they are.

Curious to know what other libraries might have been doing recently to expand their readers' advisory service, I posted to a listserv and to two RA-related Facebook groups. Below is a summary of what I discovered when I went looking for libraries that provide regularly scheduled readers' advisory using social media. I am glad to report live interactive RA using social media is blooming:

- Topeka and Shawnee County Public Library (KS) hosts weekly *Book Chat Live* evenings. A team of staff are on hand for two hours to talk about books arranged by theme and share recommendations. Afterwards they curate a list posted in the catalog using the books recommended by their community of readers.
- Olympia Timberland Public Library (WA) responded that they offer RA all day twice a month, using Facebook.
- Cuyahoga County Public Library (OH) hosts hour long *What to Read Live* sessions with librarians offering individual recommendations. They held these sessions weekly during shutdown and have continued the service on an irregular basis since reopening.
- Indianapolis Public Library (IN) hosts weekly Facebook RA sessions in addition to a casual but extremely popular "what are you reading" session on Sunday nights.
- Capital Area District Library (MI) holds *BookSleuth LIVE* sessions on Facebook. They ask readers about the last three books they have read and respond with reading suggestions.
- Denver Public Library (CO) offers a similar service they call *Three for All*.
- Hillsboro Public Library (OR) offers Facebook Live versions of their usual "*Find Your Next*" RA service. One session covers reading for children, the other for adults. Staff talk about what they have read recently and invite viewers to ask for recommendations in the comments.
- Kansas City Public Library (MO) has been doing weekly Facebook Live RA sessions since March 2020, for both teens and adults (in addition to their Zoom book club efforts).

Facebook (and Zoom) are not the only platforms supporting online RA. Twitter is the platform of choice for two long running RA efforts. Penguin Random House started #AskALibrarian in 2015. It is held every Thursday for an hour (starting at noon EST). By using the hashtag, any Twitter user can post a question asking for a good book to read. Librarians from all over the country tweet back offering suggestions, bridging the gap between in-person readers' advisory and the world of live interactive social media.

Another Twitter event directed specifically at library staff is GalleyChat, created by Nora Rawlinson and held on her site *EarlyWord*. Entering its tenth year, GalleyChat hosts librarians, readers, and publishers who use the hashtag #ewgc to tweet about the Adult galleys they have read or are anticipating. A similar session for Young Adult titles is held using the hashtag #ewgcya. The lively tweet exchanges cover forthcoming titles readers will be seeking and all the titles mentioned during each session are compiled and posted on *EarlyWord*.

These Twitter sessions offer library staff the opportunity to connect directly with customers and network with staff at other libraries. The exchanges provide the opportunity to practice interactive readers' advisory service online and, due to the character limitations of Twitter, they also provide practice on how to quickly "pitch" titles to readers in direct one-to-one conversations. The brevity of tweets enforces concision, a key skill that can be translated to all RA work. Library staff can use the tweets to help create intriguing shelf talkers and annotated lists or displays.

Through the pandemic and the shutdown, readers' advisory is working to broaden and deepen the online connection with readers. These efforts are just the beginning of how libraries adapt and invent in the new age of stay-at-home readers' advisory interaction.—*Lucy M. Lockley*

ZOOM BOOK GROUPS

I.

The Johnson County Library (JCL) is a library system consisting of thirteen branches plus a main library, serving a mix of suburban and rural population. When the pandemic first hit, we focused on survival, staying safe and working from home, and finding ways of delivering materials to patrons. However, we had to also look long-term: how does readers' advisory look in a world where our patrons are not able to enter the building? If readers' advisory is an ongoing conversation we have with our patrons, how do we hold that conversation if we never see them face to face?

Our Program Manager, Joseph Keehn, put together a committee of interested staff and held a series of conversations about what online outreach should look like and what platforms might best support virtual programming. They came to the conclusion that Facebook was a natural avenue for outreach. It was the social media platform that had the largest reach and we had built a sizable audience using it prior to the shutdown. The platform could support video and needed no additional sign-up processes. Contact was thus immediate, easy, and familiar.

Next, we did some thinking about what form our online programming was going to take. Booktalks were our answer. They were easy to develop from our existing online resources. Our goal was to string several titles together with a common thread or theme—such as genre—using six titles as a loose standard; any more than that and the presentation got too unwieldy to do on the fly; any fewer and the presentation seemed too short to be truly useful. We decided to market them as "Book Parties."

Keehn's Programming Committee developed a one-hour training curriculum for staff, and created a private library account on Facebook so staff could practice and feel comfortable on the platform. As we all know from working with patrons, technology does not always go quite as we would like, so we held mock sessions. During these dress rehearsals, other staff would pose as patrons and ask questions and comment in the chat to better replicate the feel of a live session. This practice time was invaluable, and we discovered that the skills needed for facilitating a book group and the skills needed for appearing on camera and talking about books did not always overlap. Practice helped build those needed skills.

On top of learning new ways to booktalk, we needed to learn how to offer RA without the physical library as our crutch. It is easier to start RA conversations while in the library, where we are comfortable, surrounded by books, magazines, movies, and displays, and where most of our resources and materials are within reach. Because patrons have chosen to be there, actively looking for materials, it is also more natural to offer RA. When attempting to engage patrons online, we are competing with the vast array of the internet itself, where a video, Tweet, or song can be pulled up with a flick of the thumb without the tedious business of digging out a library card number and attempting to remember a PIN.

To help reach readers online, we attempted to make the "Book Parties" personal. Instead of just reciting a handful of book titles and descriptions to a nameless, faceless internet public, we pause and acknowledge questions in real time. We respond to patrons by name and thank them for commenting. We also attempt to encourage lurkers to type something in chat, letting them know that we are interested in hearing from them and hope to understand more of what they want from the experience. We even encourage patrons to ask other library-related questions. Since a second staff member is always on hand to monitor chat, there is no reason not to use that opportunity to connect as the patron desires.

We continued the "Book Parties" throughout the summer and took most of August off to recharge and recruit more staff. Currently, we have a rotation of six staff, which translates to roughly one offering a month, with some staff picking up extra time slots as needed. We also have the ability to post previously recorded "Book Parties" if someone calls in sick or has a technical emergency.

Even though JCL is back online and we have resumed regular circulation, we feel that the "Book Parties" are an effective method of patron outreach and will continue them in the fall. By including this new method of doing readers' advisory into our toolkit, we've engaged hundreds of patrons per month that might not have ever directly interacted with us. Inspired by this, we'll certainly be looking for even more methods of outreach in the future.—*Gregg Winsor*

II.

If there is one thing libraries know how to do, it is pivot. We do this every day in one fashion or another. Yet in March 2020, and for some library staff long before that, we watched our world tilt and shift and pivot with a speed that left many of us reeling. We were defying gravity.

One service that needed a hard 180 was a staple of library programs, the book club. Similar to other libraries that host multiple book clubs, Kansas City Public Library (KCPL) experienced challenges in adapting an in-person activity to an online format.

Not surprisingly, a majority of patrons had no experience with online meeting platforms and the same was true for many staff members. The learning curve for both was steep but manageable. Libraries that have not yet made the leap into the online event and program environment should take note. Work now to bring staff and patrons to a level of comfort with both online meeting platforms and electronic formats for books.

Start with offering fundamental instruction on the use of the library's preferred online platform and on the steps necessary to access e-books and digital audio collections. KCPL hosted separate introductions to Zoom and e-formats for patrons and staff. We knew that having a casual gathering was the best approach. Attendees could check in with one another, ask general library questions, and focus solely on getting comfortable with the new setting.

The sessions walked through the finer points of Zoom: deploying the chat box, stopping and starting video, muting, using phone-in options, and following basic Zoom etiquette. We also made sure that staff knew how to "mute or boot" meeting attendees who might have distracting background noise or wandered into the wrong meeting. The goal was to make staff members comfortable enough with the software that they could answer basic questions for patrons and feel empowered to host their book groups again. It worked. Staff became so comfortable that the library started two new book groups during the shelter-in-place orders.

Another challenge was reworking the scheduled reading for many of KCPL's sponsored book groups and supporting our community book groups. We scoured the library's digital holdings for suitable titles, created a list, and shared it with book group and community facilitators. Groups that did not find appealing selections there were encouraged to talk about books in a particular genre or tied to a particular subject or simply about their current reads. We also sent requests to our collection development department for cost-per-circ and simultaneous-use options on some of the book group's selections.

Based on our work supporting readers and book clubs during the pandemic, we developed practical tips:

- Customize the Zoom invitation. Once the Zoom meeting invitation is generated, it can be copied and pasted into an email. Delete all unneeded information, which can be confusing for users with less experience or comfort in finding the crucial meeting details.
- Add useful information to the invitation, such as a link to the current book group selection, supplemental information, a reminder of the next discussion, and related library programming. Make the invitation a little more personal in tone.
- Customize the meeting room password. Zoom automatically generates a password with a variety of numbers, symbols, and upper- and lower-case letters. Create one that adheres to the Zoom password requirements but is not so unwieldy for users.
- Offer support to book group members who need to join via phone. Explain how to enter the Zoom meeting using phone numbers, meeting room IDs, and passcodes.
- Enable the Waiting Room setting in Zoom. It offers an added layer of security for library staff and participants.
- The host of the meeting can change the names of the attendees. This is particularly helpful if a book club member joins with a device attached to a different user. The host can update the name of the attendee without making permanent changes to the user's Zoom account. This is a useful trick for readers who call in. Zoom only recognizes the phone number. The host can change the screen name from 815*****37 to "Ellen."
- If the Zoom book club has a participant who has phoned in, remind all video attendees to state their names before speaking for the benefit of the caller.
- Smile. Remember, you're on camera and everyone in the Zoom room will look to you for guidance. Look directly into the teensy lens and smile.
- Remember that book group dynamics haven't changed much, even if the meeting format is new. In initial gatherings, remind attendees to use the chat for side conversations, keep themselves on mute when they are not talking, and use the raise-hand feature.
- Be extra kind as you guide your patrons and staff through this new landscape. The majority of online meeting platforms are easy to use, but there is still a level of learning that can bring added stress. Be patient, mindful, and generous with your time.

KCPL staff reached out to every book group we support, both staff led and community member led book groups. We offered Zoom tutorials, guidance on making replacement selections from our digital catalog, and instructions on accessing digital items.

Pre-pandemic, KCPL supported more than fifty books groups. During the pandemic that number dropped to fewer than twenty. Most of the library-staff-facilitated book groups wanted to continue meeting. Two new book groups were started—a group focusing on LGBQ+ titles and one focusing on Kansas City history. Attendance per group has dropped for some meetings and increased for others, as expected. Several staff members don't have reliable internet connections at their homes and a number of community book group leaders are uncomfortable using online meeting software. These groups are on reluctant hiatus. But we were surprised at the number of staff and patrons who eagerly accepted the challenge of learning new ways to stay connected to their library and reading communities.

These are the kinds of social connections that our communities are craving now. Library book clubs are still one of the easiest and most cost-effective and rewarding services we can offer. Now more than ever books can bring us together.—*Kaite Stover*

FORM-BASED RA

Readers' advisory has always felt more chatty than reference. When RA practitioners transitioned a decade or so ago from referring to readers' advisory interactions as "interviews" to calling them "conversations," it was partly in recognition of this service's more informal milieu, and to make RA more approachable for staff and patrons alike. This is not to say that these interactions call on fewer skills or resources than reference, or that excellent reference interviews cannot be conversational, as the librarian artfully fleshes out their querent's need. But unlike reference, readers' advisory often takes place in the context of an ongoing conversation that can last for decades, as regular patrons drop by in passing, sharing reading impressions and suggestions with staff, in what feels like a mutual exchange.

At our library in Seattle, all these conversations came to a screeching halt in mid-March 2020, as the nation's first hotspot shut down in an effort to slow the spread of COVID-19. Yet there was one area where these interactions took on an increased importance, in our library's online readers' advisory portal, *Your Next Five Books*. Active for over a decade, this service has always been popular, averaging around 1,800 interactions annually. In each of those exchanges, a reader of any age fills out a brief form and receives a personalized response from a librarian, including five suggested books, and encouraging the reader to share feedback. As popular as it is, the service has always been a bit under the radar, but a few weeks into the shutdown, with no physical branches to staff and enlarged capacity, we decided to advertise the service a little bit, something we'd previously been conservative about doing.

Soon, questions began to flood in. Within two months we had sent out more than nine hundred personalized lists to readers, roughly six times our usual average. The flood of readers was a little daunting at first, but also deeply reassuring for librarians working from home, greeted each morning by dozens of eager readers lined up at their virtual desks. More librarians were added to the small pool who staffed the service, and we adapted to the reality of suggesting digital formats, as our collections and chat librarians rose to the challenge of supplying and instructing thousands of new e-book and digital audio users.

Even as the crush of online traffic tempted us to rush through our responses, our patrons let us know that the time we spent truly listening to and connecting with them through personable and empathetic responses was more crucial now than ever before. This service has always received enthusiastic feedback, but now our patrons expressed real delight just to be interacting with another human. "I told my friends about this and they asked if it was an algorithm, and I could heartily say, 'NO, it was a real person!'" Not a few readers were deeply moved by the exchange: "These recommendations honestly made me cry, brought me so much joy, and made me so grateful." As one patron observed, "There's something about connecting with total strangers and receiving an unexpected gift that can reinforce that inherent optimism we all have inside." Another told us our response "has been a highlight of my months in quarantine and has buoyed my spirits." I think the only disappointed response we got was when one reader told us "I wish I would've known when I was younger what a badass job being a librarian is."

These anecdotal data were backed up by a survey of users we conducted in June 2020, in which more than 98 percent of respondents said they would recommend the service to others. Asking users which was more important: quick turnaround time or a detailed response, 83 percent of users preferred the latter. Again and again users confirmed for us the importance of the human exchange: "I hadn't realized we could keep the conversation going . . . delightful." One respondent opined, "My only problem is that I want to be friends with my recommending librarian so we can talk about the books, and I'm aware that's weird." Not so weird; librarians understand.

The pandemic also highlighted for us some weakness in our service. We are unable to serve those who might enjoy form-based readers advisory but have limited or no online access. Although it has been impractical to roll out during our continued closure, we have resolved to explore a paper option in the future, to make sure we're not denying this service to our most marginalized patrons. We also regretted that the service, which has always used the library's reference interface, hadn't been custom-made with a robust platform supporting user profiles that might better facilitate ongoing conversation between readers and staff over the course of years.

One other type of question we started to see a lot of during the closure was from other library systems eager to develop their own virtual readers' advisory services. There are many ways to design such a service, and many libraries offering examples to draw upon. A great starting place is a pair of seminal articles about form-based readers advisory published here in *RUSQ*.[1] For all those considering it, I urge you to jump on in: I am confident you won't regret it.—*David Wright*

CATALOGING FOR RA

Increasingly, reader interaction with library collections and RA services is virtual. This trend had already been developing over the past decade, as readers made increasing use of the library's e-book and digital audiobook collections and used the library catalog to browse and place holds, often only coming to the library to pick up their materials. The expansion of form-based RA took the reader-librarian interaction online. The increase in self-service hold pickup and RFID-based self-check meant that opportunities for reader interactions with readers' advisors on any public service desk were decreased. As more and more people feel pressed for time, in-person library browsing and conversations about books with library staff seem to be luxuries that few people have the time for. These trends have been exacerbated by the pandemic, as libraries closed their doors for months and on reopening limited access to the physical library with services such as contact-less curbside pickup and appointment-only collection access.

With fewer personal interactions possible and less physical access to library collections and displays at this time, and for the foreseeable future, a rethinking of how to connect with readers is important to the survival of RA services. One area that should be reviewed is how libraries can connect with readers through the catalog. The library catalog is the one place where most users of the library's collections, digital or print, come, whether or not they ever visit the physical library for more than hold pickups. Building RA content into the library catalog provides an asynchronous readers' advisory service that will be increasingly important in the future of RA.

One of the simplest ways to incorporate RA into the catalog is to take advantage of the MARC 856 field that allows the insertion of URLs into the bibliographic record. This is an excellent opportunity to connect readers with online resources that the library has created for asynchronous RA—such as booklists, read-alike lists, author profiles, book discussion guides, and more. Any RA resource on the library's website can be linked to book records using this field. If your library is doing RA-related programming and records those programs then the program link can be added to each appropriate book record. Most ILSs allow for bulk editing of records, so adding the 856 field does not necessarily have to be done on a title-by-title basis.

In addition to using the 856 field, another important RA element that should be in all appropriate catalog records is the series entry. Allowing readers to quickly connect with other titles in a favorite series makes for happy readers. The MARC 800 and 830 fields allow for entering different types of series notes.

In all cases using the MARC record as an RA tool, advisors should work closely with technical services staff to ensure that the records are accurate and consistent. Additionally, be sure to work with network or systems staff to make sure that the MARC fields to be used are set to display in the library's public catalog.

For libraries that have implemented linked data, there are also options to use catalog records to create curated lists of items based on local subject headings. Dallas Public Library has made great use of this tool in developing their Personal Librarian program, developing creative lists of materials to watch, read, or listen to, and using the MARC 650 field to pull those items together. Then, using their linked data records, these local subject headings become a bib-frame Concept that can be used to create carousels and share content.[2]

There are also ways that libraries can use third-party tools to add RA content to the library catalog. Both Ebsco's NoveList and LibraryThing for Libraries, available from ProQuest, offer a range of RA catalog enhancements, including book recommendations, series information, reviews, and more.

Regardless of whether a library is looking at local solutions or third-party products, taking advantage of the catalog as a place to engage readers will not only enhance existing readers' advisory services, but may become the way that libraries commonly engage users as we move forward in uncertain times and navigate a new landscape of library use.— *Barry Trott*

COLLECTION DEVELOPMENT RA

In the pandemic era, collection development and readers' advisory in public libraries have both come to center heavily around e-books. At BookOps, the shared technical services collaboration of the New York Public Library and Brooklyn Public Library, this sudden shift has unearthed many challenges, but has also presented new opportunities to improve both readers' advisory and collection development, and especially the relationship between the two practices. With reduced access to physical locations, readers' advisory opportunities keep patrons connected to us. Collection development is key to making the most of these opportunities. It is important to remember that for many patrons, the collections *are* the library, especially now, so overcoming the challenges of collection development during a pandemic is key to continuing to provide a high level of library service.

One of the biggest challenges we have always faced in connecting staff and patrons to our digital collections is the unusual nature of the library e-book market. The ways in which library e-book buying is different from consumer e-book buying causes a lot of confusion and frustration. E-books cost libraries more than print books, on average, and are subject to a confusing array of license types. Understanding the world of digital collection development is a critical step. All library staff need to understand the alphabet soup of OC/OU (One Copy/One User), MA (Metered Access), SU (Simultaneous Use), and CPC (Cost Per Circ), how pricing can inhibit access, and other limitations, such as the inability to purchase licenses solely for specific patrons or groups, as we might like to do for book groups or schools. As we begin to reimagine book discussions, story times, and booklists, libraries are constrained by a very different set of parameters than we face with our physical collections. I encourage librarians who build collections to hold training sessions to share their knowledge as broadly as possible. A simple one-hour introduction, as we offered to colleagues at both NYPL and BPL, can answer a lot of questions and give everyone in the library a better sense for how the digital collections are built, and how to best guide patrons through them to their next great read.

This is not the only training and communication opportunity, especially if libraries have staff time to focus on booklists and other forms of online RA. While curation is critical for digital collections, discovery, frankly, is difficult. Librarian guidance, specifically through RA services, is needed to help patrons find the many hidden gems in digital collections. Provide training on how to build digital shelves with your e-book vendors, and in the catalog if possible. Additionally, make sure there is a clear way for staff to make requests for books that they want to include on booklists or recommend to patrons via form-based RA. The pandemic should catalyze us to remove barriers and be as responsive as possible. For example, Brooklyn Public Library uses Slack, and we instituted a #request-to-purchase channel in March 2020, which has created a more transparent method of considering and replying to purchase requests.

It may seem small, but little changes to something as basic as the purchase request process can have a big impact. With most libraries experiencing budget cuts, combined with the higher costs of digital books, digital collection development *is* readers' advisory, in many ways. It is not possible to buy the same breadth of titles as we do physically, especially as we continue to balance the diverse informational and recreational needs of our patrons. Just-in-case buying with e-books is just not sustainable, so libraries need clear pathways to rapidly respond to specific requests, especially from librarians providing readers' advisory. Now is the time to examine these library processes and remove friction.

It is not all challenges, though. We have found many opportunities. For example, to support RA and outreach, we did targeted purchasing of Simultaneous Use licenses where possible and shared the list of titles with staff so they could promote the "always available" experience, and help patrons avoid the frustration of long wait times. We have also started using SU and CPC licenses to help both of our member libraries promote high-profile programs and booklists, like the Schomburg Center's Black Liberation Reading List, a program with Nic Stone for her new book *Shuri*, and BPL's Antiracism Resources reading list. When so many patrons browse the collection by looking for anything without a holds list, purchasing an SU or CPC license is in and of itself a type of readers' advisory—a signal that the library finds a title so important or compelling that it provides instant access for its patrons. In the current marketplace, with many publishers still unwilling to sell SU or CPC licenses, there are limits to this opportunity, but we are still seizing it wherever we can.

Spreadsheets and formulas turn out to be a surprisingly good digital RA tool, too. We ran reports and downloaded NYPL's complete e-book and digital audio holdings, then worked with NYPL's Reader Services department to look for titles with many available copies. These were often books that had long holds lists a year ago, and still have a lot of appeal to patrons. NYPL trained librarians to look for these titles and use them to make displays in print, and we want to take advantage of the same opportunity online. These reports are fairly easy to generate and can help a library get the most out of the often-substantial investment they have made in these titles, while also giving librarians who provide RA a new way to look at the collection.

Each community is facing its own challenges and opportunities, of course, but all libraries can benefit from approaching digital RA and collection development with as much flexibility and transparency as possible. At BookOps, this will mean continuing to find new ways to be responsive to staff and patron requests, continuing to provide training on the digital collections, budgeting money specifically to support virtual programming with CPC and SU licenses, and working closely with all colleagues providing RA. Just as with print, every e-book circulation represents a patron and their relationship with the library. Our goal is to use the tools at hand to continue to strengthen those relationships and create as many opportunities for readers' advisory as possible.—*Stephanie Anderson*

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Training, Support, and Connection for Student Library Employees in a Tiered Reference Service Model

Student employees at circulation desks are the first points of contact for many library users with research questions, but they are challenged to respond or refer when librarians are unavailable. In an attempt to cultivate student employees' reference skills, confidence, and connection to the library's values and mission, the Engineering and Physical Sciences Division of the UC Berkeley Library developed an outcomes-based training program consisting of an interactive session and a dynamic online reference manual. Student employees completed pre-training and post-training assessments of their reference skills and self-efficacy. Qualitative feedback was analyzed to identify ongoing challenges and intangible benefits for student employees engaged in reference work. Challenges observed include user expectations, infrequent questions, and the complex information landscape; benefits observed include community building and student growth. Implications of these challenges and benefits for student training programs are discussed.

Since it initially gained attention as the Brandeis Research Consultation Model,[1] the tiered or triage reference model has been implemented in many academic libraries.[2] In this model, student employees and staff answer directional and basic reference questions at the circulation desk while making referrals of more complex questions to subject librarians as appropriate. While library users have long turned to the circulation desk as the first place to ask their research questions, this tiered approach has necessarily increased as reference desks have been closed or consolidated and librarians have begun spending more time outside the library collaborating with faculty and campus partners. As the front line staff at circulation desks, student employees are called upon to triage questions at the desk but are challenged to respond or refer when librarians are not available. This is especially true at smaller subject libraries where staffing is limited.

To help improve the reference skills, confidence, and sense of values and community among its student employees, the Engineering and Physical Sciences (EPS) Division of the UC Berkeley Library implemented a student library employee (SLE) reference training program consisting of an interactive training session and a dynamic online reference manual continuously improved through student feedback. The training also explicitly reinforced the value of the student employees' contributions to the mission of the library. This study initially

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intended to quantitatively evaluate the impact of this outcomes-based training design and to share the effective materials from it, but a small sample limited the statistical analysis. Instead we refocused on a qualitative analysis of the study's open-ended questions to identify challenges that persist for student employees and their implications for student employee training programs.

BACKGROUND AND CONTEXT

Like many other libraries, the UC Berkeley Library has been evolving its reference services and transforming the role of the subject liaison. Aligned with the Association of Research Libraries (ARL) engagement with the changing role of liaisons,[3] this includes expanding roles in outreach, information literacy, scholarly communications, research data management, open science, and faculty partnerships. These new and expanded roles encourage librarians to spend time out of the library and in academic departments.

The UC Berkeley Library consists of twenty-three libraries including sixteen subject libraries that are clustered into four divisions: Arts and Humanities, Engineering and Physical Sciences, Life and Health Sciences, and Social Sciences. The EPS Division includes five libraries: Chemistry and Chemical Engineering Library, Earth Sciences and Map Library, Kresge Engineering Library, Mathematics Statistics Library, and Physics-Astronomy Library.

While some campus libraries continue to staff reference desks with regular reference hours, the context within the EPS Division requires a tiered reference model. When we began planning our SLE reference training program in 2013, three librarians covered the five libraries within the division. It was essential for student employees to be able to answer and refer questions asked at the circulation desks. While the staffing situation has since improved, our expanded liaison roles limit the availability of librarians to respond to reference questions whenever they are asked in our libraries. In fact, student employees continue to answer the majority of questions asked at our desks: in the most recent year, they answered nearly six thousand directional questions and more than one thousand reference questions. This accounted for 85 percent of all the questions answered in the EPS Division and nearly half of all our reference questions. The question therefore remains the same: how do we provide consistent reference services in-person when librarians are not always available?

We developed the SLE reference training program with the goal of improving reference services by enhancing the quality and consistency of student employee answers and increasing referrals to librarians. This effort built upon the training already provided by circulation supervisors. As a first step, we conducted a reference audit at our five libraries to understand the types and frequency of questions asked at our circulation desks to inform the design of the training program. Through this audit, we confirmed that the majority of reference questions were answered by student employees.[4] Furthermore, we determined that most of those questions could be sufficiently answered by student employees with proper training. This reinforced our decision to develop the training program and led to a focus on training for answering common reference questions—defined as questions that do not require subject knowledge and generally take under three minutes—and referring more intensive ones to librarians.

LITERATURE REVIEW

Research in librarianship has addressed the value of reference work in the academic library setting, the roles and training of student employees, and the value, growth, and evaluation of student employees, laying a foundation for our study.

Value of Reference

Todorinova and Torrence describe how academic reference librarians serve as the link between the library, its resources, and users.[5] As budgets for staffing have decreased over time, reference librarians are often unable to serve as the first contact for user queries. To respond to this limitation, many libraries have shifted their reference services to the one-desk model, making ongoing and active training necessary for an effective user experience. Bunnett et al. employed a methodical approach to reduce and ultimately eliminate the dedicated presence of librarians at service desks at Indiana State University after seeing a 45 percent reduction in reference interactions over five years.[6] They found that the consolidation of desks led to increased instructional opportunities for librarians at the institution. LaMagna, Hartman-Caverly, and Marchetti also outline the implementation process for a tiered or triage reference model.[7] The literature on this topic indicates that such models enable academic librarians to focus their efforts on providing in-depth reference consultations by appointment and information literacy instruction.

Training Student Employees

Student employees provide a vital service to libraries by taking on a range of daily tasks and offering consistent service to patrons. Thomsett-Scott calls attention to how the quality of service received from student employees compared to librarians in a one-desk model.[8] However, student employees already make up approximately 22 percent of library staff in doctoral institutions,[9] and many studies report positive findings. Keyes and Dworak found that student employees were able to provide comparable customer service when staffing an online chat reference platform.[10] Vilelle and Peters also found success in training library shelvers to respond to basic reference questions and refer when necessary.[11] Connell and Mileham emphasize that training student employees in basic reference skills is a key factor to the success of such service models.[12] Wong argues that users will direct their questions to the most convenient or welcoming service points rather than identify individuals appropriately trained to assist them.[13] Understanding this information-seeking behavior supports the investment of time in training student employees.[14]

Other works address various models for training student library employees, including specific topics to be covered in training,[15] specific skills needed in science libraries,[16] and overhauling training programs through student input.[17] However, it is not enough to simply train students on policies and procedures. In discussing the role that undergraduates now play in many institutions as peer-to-peer reference providers, Fargo comments, "To create these meaningful employment opportunities, we must commit time to set up the training, provide the necessary scaffolding to give our students the skills they need to participate in a reference conversation."[18]

Value to Student Employees

In addition to organizational contributions, student library employment may also promote personal growth and academic success for the student as evidenced in a systematic review by Mitola, Rinto, and Pattni.[19] While much of the literature on student training programs focuses on the positive effects of well-trained students on library operations, recent research takes into account how student library employment can support and encourage student development in their own endeavors. Hoag and Sagmoen note that on-campus student employment has been shown to increase student motivation, performance, and overall engagement with the educational experience.[20] Using the Social Change Model of leadership development, Milton and Meade found that students who learn to promote library resources through experiential learning also grow and develop as leaders.[21] Open communication, engagement within the library community, and constant redevelopment of student employee programs foster opportunities for leadership. However, Charles, Lotts, and Todorinova's survey of 350 student library employees found that while students report a generally positive experience working in the library, they may have a limited understanding of the rewards of their positions, and at the same time the library may not be tapping into the full potential of their contributions.[22] Communicating the value of library employment to students beyond their immediate roles has strong implications for training.

Qualitative Evaluations of Training

Part of understanding whether a training program is effective depends on the accurate assessment of student understanding both in the training session itself, but also more broadly in employee performance on a daily basis. Previous studies have highlighted the role for qualitative assessment of student work experiences in the library. Brenza, Kowalsky, and Brush discuss student workers' perceptions of the library as a result of their employment experiences.[23] Student employee responses demonstrated a disconnect between students' training to answer specific common reference questions and expectations that students will gain a more abstract and nuanced understanding of the role of the library and its services. Student roles are not always clearly defined so librarian perceptions of students' responsibilities may differ from the day-to-day experiences. In Stevens and Mundt's work, students wrote reflective statements about their work experience in a research commons. Assessment of these reflections ascertained the value of this practice as part of student job duties. Tellingly, the authors note, "written reflection doesn't always have to have an immediate, quantifiable benefit to be valuable to the Research Commons and to our team."[24] Becker-Redd, Lee, and Skelton instituted post-training surveys later in the semester to give students an opportunity to reflect on the effectiveness of their training session and identify areas where more guidance is needed.[25] These studies lay the groundwork for our qualitative evaluation of student employee experience.

Our study contributes to the body of literature on student employee training in an academic library with a tiered reference desk model. It weaves together threads from prior research on the importance of reference work, the changing roles of liaison librarians, and the need for, training of, and assessment of student employees. This work provides an outcomes-based approach to training student employees for reference work that employs qualitative feedback to identify ongoing challenges and upholds the value of student library employees to the larger mission of the library.

SLE REFERENCE TRAINING PROGRAM

All EPS Division student employees are invited to attend our annual SLE Reference Training in the fall semester. The two-hour session provides an interactive experience that encourages discussion and collaboration. For learning objectives, students should be able to accomplish the following after training:

1. Recognize other SLEs and build a sense of team spirit
2. Articulate the role of SLE reference services in the mission of our academic library
3. Follow the tiered reference workflow
4. Understand the information landscape in engineering and the physical sciences
5. Recognize and find subject-specific resources
6. Use the SLE Reference Manual for procedures in managing reference questions
7. Respond to common reference questions
8. Refer intensive reference questions to the appropriate subject librarian
9. Follow guidelines for good library service

Using some of the training practices identified by Stanfield and Palmer,[26] the session reinforces these learning objectives through lecture content, discussion, and activities. For instance, to build a sense of team spirit (Objective 1), the students play a game of human bingo as an icebreaker. While all the objectives above are covered in the training, we focus primarily on the four objectives described here.

Objective 3: Follow the tiered reference workflow. Student employees learn about the meaning of "reference" in the context of libraries and identify the three types of questions asked at service desks: directional, common reference, and intensive reference. As a group, the students recall questions they have received at the desk and then categorize each question. They also review which library staff are responsible for answering each type of question. Specifically, intensive reference questions should be referred to subject librarians while directional and common reference questions can be answered by students and circulation staff.

Objective 6: Use the SLE Reference Manual. Students review an online manual on addressing common questions when a supervisor or librarian is not available. The manual includes the most commonly asked questions at our libraries—as identified through our month-long reference audit—and provides step-by-step procedures and scripts for answering them. Most importantly, the manual is a flexible document; it is open for commenting by student employees and staff so that we can edit or add content in a timely manner.

Objective 7: Respond to common reference questions. Over a quarter of the training session is spent on helping students learn to respond accurately and confidently to common reference questions. Small groups of 3–4 students work on case study exercises that address finding journal articles, finding books, finding specialized software, general library use questions, and library-specific questions (e.g., finding air photos at the Earth Sciences and Map Library).

Objective 8: Refer intensive reference questions to the appropriate subject librarian. The training emphasizes the need to recognize intensive reference questions and to refer them to the appropriate subject librarian. Students are given a suite of tools for referrals including a web-based *Ask a Science Librarian* form and contact information for our subject experts.

METHODOLOGY

Prior to 2017, evaluation of the training program consisted of a brief post-training survey to assess how useful students found different elements of the training. As part of the development of our study in 2017, we redesigned our assessment tool to address the study's research questions, adding a pre-training component as well as self-assessment and reference-assessment questions. As a result, in fall 2017, both qualitative and quantitative data were collected via pre-training and post-training assessment surveys conducted using Qualtrics online survey software. The training session took place in late October. Distributed approximately one month prior to this session, the pre-training assessment contained three sections. Self-assessment questions determined student confidence answering and referring questions on a five-point Likert scale. Reference assessment questions contained a series of common questions encountered at our circulation desks with multiple choice answers; this section was "open book" wherein students could use any available resources to answer the questions. Open-ended questions collected students' views on reference challenges and training at the circulation desk.

The post-training assessment, distributed approximately one month after the training session, contained four sections. Three sections were similar to those in the pre-training assessment to allow comparisons; an additional section on training satisfaction evaluated student reactions to the training itself. Average gain scores were calculated for attendees and non-attendees to compare their improvement on the reference assessment questions. Emergent thematic coding was used to identify themes within the qualitative responses.

Surveys were distributed to all student employees regardless of whether or not they attended the training in order to compare the two groups. In compliance with the policies of the UC Berkeley Institutional Review Board, participation in the pre-training and post-training assessments was voluntary and anonymous. To match pre-training and post-training scores anonymously, we relied on students to correctly enter matching and untraceable identification numbers (using a portion of their student ID numbers) when completing the assessments. In an effort to increase participation, we held a gift card prize drawing that all student employees could enter.

The reference manual, lesson plan, case study exercises, pre-training survey, and post-training survey are available as supporting materials.[27]

RESULTS

During fall 2017, the EPS Division libraries employed thirty-eight student employees. Of these students, twenty-three attended our reference training in October 2017. All student employees were invited to complete the surveys, but to be included in the quantitative analysis, they needed to attend the training and complete both the pre-training survey and post-training survey. Twenty-seven participants began the pre-training assessment; however, only twenty-one surveys were completed (figure 1). The post-training assessment was started by twenty participants and completed by fourteen participants, but rendered only twelve survey responses that could be matched to a pre-training survey response. Of those twelve responses, nine participants indicated they had attended the training session. This implies a 23.7 percent completion rate of the full study among all student employees (i.e., nine participants among a student employee population of thirty-eight).

The study was structured around a pre-training and post-training survey, but with only nine responses available for quantitative comparison, the small sample size did not lead to broader conclusions. In the interest of transparency, quantitative results are appended (see appendix 1). Despite the small sample size, we hope the inclusion of these findings will be valuable to library researcherswho may be considering similar study methods, particularly involving student employees. Due to these limited quantitative results, we pivoted our focus to an analysis of the study's open-ended questions. To be eligible for the qualitative analysis, participants simply needed to complete at least one open-ended question on either survey. Across the two surveys, nineteen unique participants (50 percent of our student library employees) responded to one or more of the open-ended questions. We used this analysis to identify the challenges student employees face, those that persist after training, and the implications for improving student training.

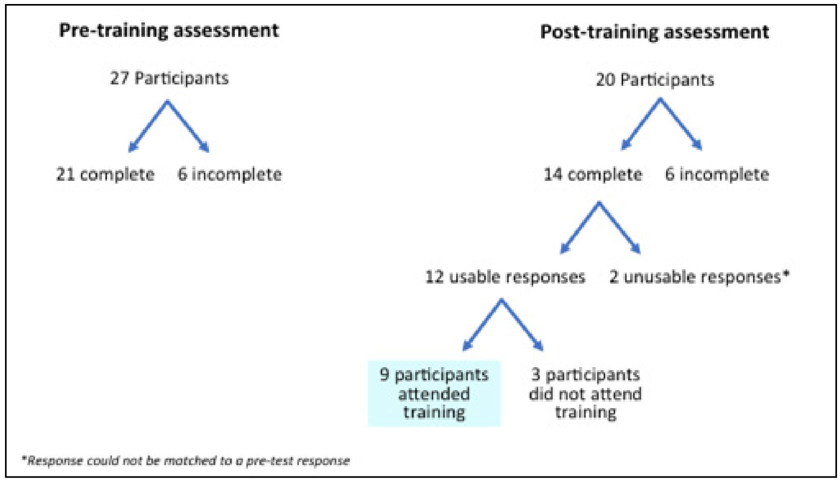

Figure 1. Pre- and Post-training assessment responses

Challenges SLEs Encounter

In the pre-training assessment, participants were asked: "In general, what are the biggest challenges you face in helping users with reference questions?" Through emergent thematic coding, participants' free-text responses fit into five themes: insufficient subject and reference expertise, working with user expectations, navigating and understanding resources, finding library materials, and lack of practice with obscure questions. Within the first theme of insufficient subject and reference expertise, participants commented on the challenge of directing users to the most helpful source, answering open-ended questions, and understanding when to refer to a librarian. One participant's comment encapsulates the multiple challenges of the reference experience.

> The biggest challenges that I face in helping patrons with reference questions is trying to understand the question that they are asking. They may come to the desk with topics that I am unfamiliar with so I struggle at first to understand what they are asking to then determine whether it is something I can help them myself with or if I should refer them to a librarian.

For some participants, concerns about insufficient expertise persisted following the training, especially related to managing open-ended questions. In the post-training assessment, they commented on the difficulty of understanding unfamiliar keywords and what users are asking.

Five participants commented on the challenge of working with user expectations. One noted how users may become impatient, and others described feeling time pressure, which leads them to "get nervous" and "blank out" while attempting to answer questions. Another participant commented that some users appear to disregard student employees and prefer assistance from a librarian or staff supervisor.

Navigating library resources and finding materials also emerged as particular challenges, especially in regard to finding journals, locating maps, and understanding the various navigation paths to resources. These themes persisted in the post-training assessment comments, with students again noting the difficulty in knowing the most efficient way to find a specific journal or article. One student commented:

> I feel like there are so many different websites, search options, and different databases available that it can be difficult to figure out which one would be the best way to search for what the patrons need.

Finally, participants expressed concern about their lack of practice with infrequent questions. Participants said they are not accustomed to answering less frequent or intensive questions such as finding a thesis or using a specific database. One participant commented on the need for additional practice:

> [The] biggest challenge I face is not having enough practice and not being familiar with how to answer the questions so it takes me a little longer to come to a conclusion.

Opportunities for Improvement

In the post-training survey, participants were asked how their skills in helping users with reference questions could be improved. Their responses fell into four themes: utility of training sessions, need for additional practice, standardized and simplified navigation, and familiarity with the library website.

In terms of training utility and the need for practice, participants expressed appreciation for the training sessions and demand for further training. Three participants commented on the need for more practice opportunities, specifically involving the retrieval of newspaper articles and maps. Two participants affirmed that the training sessions would improve their reference skills.

Additionally, participants commented on the need for standardized and simplified navigation. This relates back to the challenge noted in the pre-training assessment of navigating through our multitude of online resources. One participant suggested a "flexible step process" that begins with a concise overview of the multiple methods for starting a search. Another student commented on quick access to guides:

> Make access to the LibGuides or reference guide very easy and fast, maybe from a centralized page of URLs.

Finally, participants wished to gain greater familiarity with the library website. Their comments highlighted the need for regular reviews of the site to remain familiar with the range of useful guides, information, and tools available there.

> Should [new student employees] have any patrons that need to know more about guides or software, that site has a lot of information. Supplementing that with the manual is very helpful.

Overall participants rated the training highly and learned lessons from it. Yet their comments indicate that challenges persist and improvements could be made. What do these results mean for training student employees and providing reference service?

DISCUSSION

Over time we have learned that training attendees find the session helpful; student employee comments identify the case study exercises as a particularly useful component and indicate they wish to spend more time on them for learning. At the same time, our analysis of their qualitative feedback indicates there is room for improvement as we address the following challenges: user expectations, infrequent questions, and the complex information landscape. Our analysis also identified benefits of our training program such as community building and student growth that could be cultivated and strengthened in the future.

Strike a Balance: Managing Expectations and Referring

A critical theme highlighted by our study is the tension between user expectations of immediate service and a tiered reference model where complex questions are referred and answered later. Our student employees are caught between dueling expectations to provide reference services and to refer to librarians. Students clearly care about providing good public service, as indicated by their thoughtful responses to questions about service challenges. For example, after the training some participants commented that they still felt pressure to answer complex reference questions, which implies the training was perhaps less successful at validating the tiered reference model workflow and increasing referrals to librarians. Additionally, several participants commented on lingering confusion around recognizing questions that need to be referred. In short, even post-training, it appears that student employees still feel a need to answer complex reference questions, in part due to user impatience and in part due to confusion about the expectations and outcomes of the tiered reference model.

Training implications. To improve student understanding, we could better clarify the purpose of the training, both for planning the session and introducing its objectives to participants. Is the training's purpose to help student employees become better at managing reference questions, to encourage them to refer, or both? Being an effective student employee in the tiered reference model requires a balance of confidence in order to answer simple reference questions accurately and of self-awareness of one's limitations in order to refer appropriately. To further clarify the role of student employees within the tiered reference workflow, we could also collaborate with the circulation supervisors to develop clear guidelines and outcomes related to our expectations of student employees.

Additionally, student employees may feel confusion or hesitation about referrals because they do not understand the full landscape of reference work. To address this problem, the training on referrals should be shifted to emphasize the reference interaction after the referral as opposed to focusing solely on the student's role. For example, the training could walk students through an example of an intensive reference question and explain how the user and librarian both benefit from the interaction, and consequently, student employees may feel less pressure to answer reference questions themselves and be more comfortable referring to a librarian.

Few and Far Between: Practicing Infrequent Questions

Participants cited the lack of practice with infrequent questions as an obstacle to success. Our training focuses on teaching student employees to identify common reference questions and appropriately manage them. Yet during the study period, student employees reported not gaining sufficient experience with infrequent and intensive questions to feel comfortable differentiating, answering, and referring them.

Training implications. Two solutions could address this lack of practice opportunities for infrequent questions. First, we could institute regular reference audits in the EPS

Division to confirm the common versus infrequent reference questions being asked at the circulation desk. Since the 2013 audit, the overall number of reference questions has been declining, and it is unclear if the same categories of questions are being asked. As a result, student employees may have less opportunity to practice answering the reference questions that we address in our case studies and reference manual. Regular reference audits would assess the types of questions being asked and verify that content covered in our training continues to match the experiences of student employees.

As a second approach, we could offer students more consistent practice with reference questions throughout the year. We began to implement this approach in spring 2018. Student employees now take two refresher quizzes per semester which allow them to work through case studies similar to those at the annual training. Each quiz consists of three questions, a mix of circulation and reference questions for a total of twelve questions throughout the year (six circulation and six reference). Student employees' reference question responses are reviewed by librarians, and then circulation supervisors personally provide feedback to each student employee to coach them. These refresher quizzes grant additional opportunities for student employees to practice managing infrequent questions.

Too Many Paths: Navigating Multiple Resources

Many participants commented on the confusing array of resources available for searching and answering users' reference questions. While our online reference manual strives to outline simple and explicit procedures for conducting searches and responding to users, the complexity of the information landscape leaves student employees uncertain about the most efficient approaches. As an example, there is confusion about whether to search and demonstrate the library's discovery layer or the classic local catalog.

Training implications. To counter this confusion, we could simplify procedures further and direct student employees to a smaller set of resources. While this might alleviate confusion, it would also mask the complexity of our library environment and might not serve the student employees' growth as learners and researchers. As an alternate approach, we could incorporate an information literacy component into the training session. Focusing on the frames of "Information Creation as a Process" and "Searching as Strategic Exploration" from the ACRL Framework for Information Literacy for Higher Education,[28] we could teach student employees to understand the information landscape, choose appropriate databases and search strategies, and evaluate resources. By emphasizing these underlying information literacy concepts in addition to basic reference procedures, we could help students improve as library employees while also benefiting their academic learning and research.

Intangible Positives: Community Building and Student Growth

While there are still challenges to be addressed, we have also identified benefits of the training program to the EPS Division and our student employees. For one, the training program provided the opportunity for cross-training student employees so they can be prepared to answer reference questions at all five libraries in the division. Consequently, students may serve as substitutes at different libraries and manage a range of library-specific questions. Bringing our full cohort of student employees together has also reinforced the mission of the libraries, fostered community among the students, and connected the students with librarians.

In addition, the training program partly addressed the affective domain of student learning and engaged the high-impact practices of student library employment identified by Mitola, Rinto, and Pattni.[29] For example, the training program engaged the students in the substantive work of answering reference questions and promoted peer mentoring during the case study exercises.

Training implications. When we initiated this training program, we set out with objectives for improving student employee performance in answering common reference questions and referring intensive questions. Through the process of conducting this study, our perspective has shifted to a more holistic view, encompassing the intangible positives that student employees might gain from their work at the library. This will require increased focus on affective factors, such as building confidence and providing experiences that will promote student success and retention. As reflected in their comments, our reference training did not adequately address student employees' concerns about their lack of subject expertise. Perhaps by taking into account how their library employment fits into their greater academic and personal experience, we can better support student employees and relieve some of the anxiety around their perceived need to always have the answer.

CONCLUSION AND FUTURE WORK

This article shares our strategies for an outcomes-based student library employee reference training program connected to library values and mission. Through the analysis of comments from student library employees engaged in reference work at circulation desks, the study identifies challenges that persist after training, which include reluctance to refer questions, difficulty in recalling procedures, and confusion about the large number of resources and strategies available. Improvements such as regular refresher quizzes and more focus on affective factors could address these challenges.

Future work could assess the effectiveness of our suggested training improvements, particularly how the pairing of refresher quizzes with the annual training influences students' ability to answer reference questions and refer to librarians. Another direction is investigating the broader impact of the training's intangible positives. There are opportunities to explore how the training's community building efforts influence students' dedication to their library work, whether increased confidence in reference work impacts their broader academic experiences, and which practices help student employees manage user expectations.

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APPENDIX 1: QUANTITATIVE RESULTS

Training Session Evaluation

Participants responded to statements regarding self-efficacy and answered questions that evaluated the usefulness of the training session on a five-point Likert scale. Overall they rated the training session as more than satisfactory and helpful, with students who attended previous training sessions rating more highly (table 1).

Participants also completed multiple-choice sample reference questions to assess their ability to accurately respond to questions. The nine participants who had attended the training showed greater improvement with an average gain score of 12.3% (table 2). A one-sample t-test determined whether the mean gain score among SLEs who attended the training is significantly different from zero. The mean gain score ($M = 12.22$, $SD = 11.60$) was a statistically significant difference, 95% CI [3.31 to 21.13], $t(8) = 3.162$, $p = 0.013$.

Three of the participants did not attend the training session; however, having gained additional experience since the pre-training survey, they still showed improvement with an average gain score of 7.4% between their pre-training to post-training assessments.

In the self-assessment sections of the surveys, participants rated their ability to answer reference questions before and after the training session. On average, participants improved in their confidence to answer reference questions. Those with previous training had a higher sense of self-efficacy, but those with no previous training reported a decrease in their confidence to refer questions appropriately.

Table 1. Training Session Evaluation

	No Previous Training (n = 6)	**With Previous Training (n = 3)**	**Respondents Overall (n = 9)**
How satisfied were you with the training?	4.50 (0.55)	5.00 (0.00)	4.67 (0.50)
How helpful was the training session on your ability to help with user reference questions?	4.00 (0.63)	5.00 (0.00)	4.33 (0.71)

Average rating (standard deviation):
1 = not satisfied/not helpful; 5=very satisfied/very helpful

Table 2. Average Pre- and Post-Training Assessment Scores

	Participants Attended Training (n = 9)	**Participants Did Not Attend Training (n = 3)**
Pre-Training	80.2% (s.d. = 15.5%)	77.8% (s.d. = 11.1%)
Post-Training	92.6% (s.d. = 9.6%)	85.2% (s.d. = 17.0%)
Gain Score	12.3% (s.d. = 11.7%)	7.4% (s.d. = 23.1%)

Table 3. Self-efficacy Ratings

	No Previous Training (n = 6)		**With Previous Training (n = 3)**		**Respondents Overall (n = 9)**	
	Pre	Post	Pre	Post	Pre	Post
Overall, I am confident that I can help users with their reference questions.	3.67 (0.52)	4.00 (0.89)	5.00 (0.00)	5.00 (0.00)	4.11 (0.78)	4.33 (0.87)
If I can't answer a reference question, I am confident that I can refer the user to the appropriate person for help.	4.67 (0.52)	4.50 (0.84)	5.00 (0.00)	5.00 (0.00)	4.78 (0.44)	4.76 (0.71)
I have received sufficient library training to handle reference questions.	4.00 (0.63)	4.17 (1.17)	5.00 (0.00)	5.00 (0.00)	4.33 (0.71)	4.44 (1.01)

Average rating (standard deviation): 1 = strongly disagree; 5 = strongly agree

"I've Already Googled It, and I Can't Understand It"

User's Perceptions of Virtual Reference and Social Question-Answering Sites

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For librarians to continually demonstrate superior and high-quality service, they must meet the needs of current and potential users. One way that librarians have met the needs of users is by expanding their service offerings online via virtual reference services (VRS). This expansion is particularly critical in the current time of COVID-19. To provide high-quality VRS service, librarians can learn from social question-answering (SQA) sites, whose popularity reflect changing user expectations, motivations, use, and assessment of information. Informed by interviews with 51 users and potential users of both platforms this research examines how strengths from SQA can be leveraged in VRS, and what can be learned from SQA practices to reach potential library users. This study represents one of the few comparisons between VRS and SQA that exist in the literature.

Informed by user demand, librarians have expanded their service offerings online. One significant and now longstanding offering is virtual reference services (VRS). These services are increasingly relevant in the current time of COVID-19, as librarians have scrambled to meet their user needs virtually. Librarians can implement high-quality VRS by learning from VRS research, which has developed methods and empirical evidence to assess and improve service quality. However, current research is limited, focusing on pre-existing users rather than potential ones, including the many individuals relying on social question-answering (SQA) sites to ask and answer questions online. SQA sites have similar objectives to VRS, but their differences reflect changing user expectations, motivations, use, and assessment of information.

For librarians to continually demonstrate superior and high-quality service, they must meet the needs of both current and potential users.[1] Improving VRS services is no different. Informed by interviews with 51 users and potential users, this project examined how strengths from SQA can be leveraged in VRS, and what can be learned from SQA practices to reach potential library users. This study represents one of the few comparisons between VRS and SQA that exist in the literature. Findings provide context and offer practical suggestions for translating reference services to virtual environments in ways that continually meet user expectations and needs.

LITERATURE REVIEW

VRS, including live chat and email, have become practical alternatives to face-to-face (FtF) and telephone communication with librarians.[2] The majority of public and academic libraries now offer VRS,[3] addressing a growing demand among users for 24/7 access to library resources and services,[4] and the changing ways individuals seek, share, and use information online. This offering of VRS has increased as librarians have rapidly and suddenly had to move their services online as COVID-19 has become a global pandemic. Preliminary results of research that includes a national survey and in-depth interviews with managers/directors of live chat services in academic libraries reveals an increase in virtual services, driven by the COVID-19 related closure of nearly all physical library buildings for an extended period of time beginning in March 2020.[5] Anecdotal evidence, including VRS how-to's and case studies, have also emerged in practitioner literature and services such as Springshare have experienced a 267% increase in total chats when comparing February to August 2020 across the US, Canada, Europe, and Australia.[6]

People's use of social media as an information source has also grown. In 2017, 67 percent of Americans reported getting news on social media sites.[7] People also use social media to gather health information and information about crises and social movements.[8] One social media service paralleling VRS is SQA, such as Quora, Yahoo! Answers, and WikiAnswers. While both SQA and VRS provide "high-quality information that satisfies the information seekers' needs,"[9] these services differ in how they deliver information and who they enlist for delivery.

SQA services are collaborative. They rely on information from multiple individuals in a community, rather than a single expert, and thus provide a one-to-many service model of information delivery.[10] These services are inexpensive, asynchronous, and useful for building social capital within an online community. Unlike SQA, VRS sites like Springshare involve a one-to-one interaction between a user and librarian, who has expertise with searching and may also have expertise in the user's subject area. These interactions occur asynchronously or synchronously.[11] While these services are free, as compared to some SQA sites requiring payment, individuals may not be able to access them if they do not belong to the library in question or are unaware of their existence.

Because of these differences, studies of VRS and SQA are often conducted separately. The following literature review is divided into two sections, one on each service, and conclude with a section reviewing studies that have directly compared them.

VRS Research

Within libraries, VRS has become a "user-preferred medium for knowledge exchange."[12] Since VRS provide a new environment from which to engage in a reference encounter, studies have focused on how the mediated context affects the quality of answers received when using these services.[13] Prior research has found timeliness to influence VRS quality. Reference interviews are rarely conducted in chat and email-based transactions due to the librarian's desire to provide a satisfactory answer quickly.[14] The absence of these reference interviews, valuable to gaining insight into a user's information needs, likely contributed to shifting the volume of user queries from subject search to procedural questions.[15] Question type also varies by VRS platform. Rourke and Lupien found that users of library-based reference services were more likely to use IM-based services for less formal, ready reference content and live chat services, with features like co-browsing, for formal, in-depth searches.[16] Mawhinney and Kochkina had similar findings, noting that question complexity was lower for text-based VRS as compared to chat and email.[17] McKewan and Richmond also found an increase in question complexity when longitudinally comparing transcripts from a VRS live chat service.[18] Therefore, librarians must be aware of user motivations and expectations when using a particular service, since they will impact what types of questions elicit high-quality answers.

Effectiveness and efficiency, or being given a relevant answer in a reasonable amount of time, are two additional measures impacting VRS quality and user loyalty.[19] Similar to timeliness, these measures are context-dependent and based on user motivations and expectations. For instance, while in many cases users prefer unassuming questions that can be answered quickly,[20] others use the service for complex questions involving research assistance and instruction, as well as technology-based help such as website navigation.[21] Other studies have focused on the importance of experts in providing quality and satisfactory answers to end users, suggesting that relational features during the reference transaction influence effectiveness.[22] Presence of relational features, such as providing empathetic expressions and high levels of engagement, also has been shown to increase accessibility of VRS services.[23] Additional work has examined VRS within specific contexts, such as information literacy instruction,[24] with findings offering implications for improving practice. Finally, Radford et al. and others have demonstrated that collaboration is vital for the provision of quality service and has the potential to be fostered between VRS librarians and those providing SQA services.[25]

SQA Research

Unlike VRS, which has a one-to-one model, the one-to-many model of SQA has resulted in studies of norms governing assessment, identity formation, and motivation unique to its multidimensional and collaborative platform.[26] Several elements of the SQA service model have been addressed by conceptual frameworks, such as value assessment,[27] network interaction between community members,[28] community evolution over time,[29] and intermediation.[30]

Past SQA research can be categorized as being either user-based or content-based.[31] User-based studies focus on classifying the types of people that use the service and how users vary concerning motivation and satisfaction when using the service.[32] Classification of users within SQA services varies based on service type. For example, Shah, Oh, and Oh found that consumers, or those who ask questions, greatly outnumbered contributors or those who answer questions, within the now-defunct Google Answers, while there was more of a balance between these user types in the now-defunct Yahoo! Answers.[33] Various roles within SQA sites can also affect the kind of content exchanged, and whether it is even exchanged. In his examination of Answerbag, Gazan typified users into seekers, or those who interact with the community when posting questions, as opposed to sloths, who post a question, often homework-related, verbatim, and have no further interactions. He found that community members were more likely to assist seekers in fulfilling their information needs, and attempted to educate sloths regarding the ethics and values of the community, which shares values parallel to those of reference providers.[34] Most recently, Roy et al. distinguished between reputation collectors, who contribute low-quality content to gain reputation points, versus caretakers, who are motivated to provide high-quality content.[35]

The social values of SQA sites also influenced reported motivations of use. Studies indicate that SQA answerers are generally motivated to provide answers to collect social capital, enforce site norms, monitor answer quality, and attain personal via altruistic behavior,[36] while askers are motivated to fulfill cognitive, social, and emotional needs.[37] These latter motivations vary by platform. For example, Choi and Shah, found that while users of Yahoo! Answers and WikiAnswers both reported fulfilling cognitive needs as their primary motivation for service use, in WikiAnswers, these needs were based around fact-finding questions, while in Yahoo! Answers, these needs reflected questions soliciting advice or opinion-based questions.[38] These findings parallel prior VRS research suggesting that content exchanged varies based on the service model.

The other primary type of study performed in SQA, content-based, examine factors that compromise quality and satisfactory answers through predominantly quantitative approaches.[39] Models have been developed to predict asker satisfaction using proxies and experts as evaluators.[40] However, these models have not established a comprehensive set of criteria to account for outside variability of answer quality not explained by the models.[41] Thus, qualitative methods of evaluation have emerged. For example, through content analysis, Kim and Oh identified characteristics, such as answerer politeness, as the most critical factors influencing asker satisfaction.[42] Similar to VRS research findings, recent SQA research also suggests that users rely on actual characteristics of answerers,[43] especially in when seeking health information.[44] Emerging content-based approaches have investigated why specific questions are more likely to get answered than others, with implications for expert question routing and design, such as the identification of similar or complementary questions.[45]

Comparing VRS to SQA

Few direct comparisons exist in the literature between VRS and SQA. Existing comparisons find that SQA and VRS users, experts, and designers view them as complementary services, rather than in competition. This complementarity is due to the varying motivations and expectations for each service. Users prefer SQA for relational questions and prioritize the end product over the process. For these reasons, SQA users highlight its high content volume and speed, as well as its social and network-based aspects as critical strengths of the service. Users prefer VRS for fact-based questions and, conversely to SQA users, prioritize the process over the product. By understanding the process by which the answer was derived, these users can feel confident in the quality, relevance, accuracy, authoritativeness, and completeness of the answer.[46] Findings suggest the existence of service and design synergies for SQA and VRS services.[47]

RESEARCH QUESTIONS

Based on findings from the literature review, this research addresses several gaps. First, most studies engage in content analysis of preexisting VRS and SQA content as opposed to interviewing users directly. This methodological choice represents a missed opportunity to uncover user perceptions of these services, which can directly inform improvements to service models.

Further, the majority of VRS and SQA studies focus on service quality. While service quality is essential, other key relational and motivational factors also have been found to influence service use and evaluation, and, therefore, should be considered in research of online question-answering (Q&A) services, inclusive of both VRS and SQA. Finally, few studies directly compare VRS and SQA, despite their potential design synergies.

Informed by these research gaps, this study addresses the following research questions:

- RQ1. What are user motivations for using online Q&A services? How, if at all, do these motivations vary by service type?
- RQ2. Where do users go when they have questions that require subject expertise? Why do they go there?
- RQ3. How do users evaluate online Q&A services? How, if at all, does this evaluation vary by service type?
- RQ4. How can the strengths of VRS and SQA be leveraged against each other's weaknesses?

METHODS

Recruitment

Data collection and analysis for this project occurred between 2012-2014. To address the research questions, the research team interviewed VRS and SQA users. The team divided recruitment into two rounds by service, VRS or SQA. To participate in the study, participants had to demonstrate their use of either VRS or SQA services at least once in the previous six months.

Participants were recruited using snowball sampling techniques, which consisted of study investigators emailing recruitment scripts for VRS and/or SQA users to personal contacts, who were asked to consider participating in the study or forwarding the script(s) to others who might participate and/or to their university listservs. Also, for Round 1, the team posted a pop-up message to Maryland AskUsNow! VRS and for Round 2, the team asked contacts at several universities and public libraries to post flyers in their spaces promoting the study. These recruitment efforts culled a final participant list of 54 users of VRS and SQA services. Since three participants indicated prior experience working in a library, their responses were not analyzed, yielding a total of 51 participants. Each participant received a $30 honorarium.

Data Collection

Data were collected for this project via telephone interviews. Interviews provide rich insight into human behavior, which was the primary goal of this study.[48] While telephone interviews were used to address geographical and time barriers between researchers and participants, this modality can pose a limitation due to its lack of FtF context.

Interview questions developed for this study are based on the analysis of VRS and SQA transcripts from OCLC Question Point's VRS and the SQA site, Yahoo! Answers. Specifically, areas identified in the transcripts that needed to be more fully understood and probed were included as interview questions. These areas identified how users of online Q&A services access the services, motivations for use, and if their experiences were successful or unsuccessful. The critical incident technique (CIT) was used when asking questions to determine the success of the interaction. CIT questions were developed using Flanagan's original technique, as well as Dervin's notion of critical incidents as moving through space-time, which asks participants what changes they would enact in a specific context given a magic wand.[49]

After an initial set of questions were developed, they were pre-tested on three individuals. Based on the comments of the individuals regarding the clarity, relevance, and scope of the questions to an online Q&A experience, the interview questions were revised accordingly.

The finalized interview schedule consisted of close-ended questions regarding categorical demographic information and the use of online SQA services, as well as open-ended questions regarding the use of VRS and/or SQA. Interviews were performed via telephone and lasted between 7 minutes and 20 seconds and one hour and 38 minutes. The mean time for interviews was 28 minutes and the median time was 23 minutes.

Data Analysis

Transcripts of the open interview questions were coded by two coders using the grounded theory method to establish general thematic concepts.[50] As a preliminary step to coding, coders divided the transcripts by interview question and met in pairs to annotate five interview transcripts for each question that they were assigned. Annotations consisted of brief notes that summarized the main concepts expressed by the participants in the transcripts. Once coders agreed on how to code the emergent concepts, they divided transcripts by question and developed coding schemes for their assigned questions.

Coding was divided into two stages—the initial stage and the final stage. In the initial phase of coding, the assigned coder studied a transcript line-by-line and categorized the data with a name that described what was occurring within that line or lines. As coding progressed, the coder engaged in constant comparisons between the data to define analytic distinctions between codes. Following this initial phase and informed by constant comparative methods, the coder revisited these initial codes and engaged in focused coding, where salient codes that frequently occurred within the data were selected and organized into higher level concepts.[51] The final themes established during focused coding were then used to develop a formal codebook. This codebook consisted of the theme, a brief description of the theme, and quotes from the transcripts that exemplified the theme.

Coders established inter-coder reliability (ICR) in pairs. An initial round consisted of coding ten transcripts for each question and revisiting codes that did not have an acceptable level of agreement (> 0.85). Based on a discussion between the two coders regarding inconsistencies, the resulting codebooks were revised, and an additional five transcripts were re-coded and inter-coder reliability re-calculated for an overall kappa level of 0.95. Coders then worked separately to code the rest of the transcript data within their assigned questions. The results of this coding, including a discussion of the coding schemes, now will be discussed.

FINDINGS

Demographics

The majority (58% total) of respondents identified as students (students, 25%, n = 13; undergraduate students, 25%, n = 13; graduate students, 8%, n = 4). Other respondents identified as holding various occupations, including managerial roles, sales roles, an attorney, an adjunct professor, and homemakers. The majority of respondents were ranging in age from 19-25 (57%, n = 31), followed by those from 26-34 (22%, n = 12), those from 35-44 (10%, n = 5), and those from 12-18 (8%, n = 3).

Respondents reported searching the web frequently, with more than 10 web searches per day (39%, n = 21), followed by those searching the internet between 4-6 searches per day (26%, n = 14). No one reported searching the internet occasionally (at least 1-3 searches per day). Along with being frequent searchers, not only did the respondents search the web frequently, but they also felt that they were very experienced searchers (43%, n = 23), followed by those who reported being experienced searchers (37%, n = 20). Respondents also indicated satisfaction with using web searches to find what they were looking for very often (59%, n = 32) or often (37%, n = 20).

The majority of respondents reported using SQA services (94%, n = 47), while a smaller proportion reported using VRS services (39%, n = 20). Of the individuals who used SQA services, 43% (n = 20) visited SQA sites 1-3 times per week, followed by those visiting more than 3 times per week (30%, n = 14) and those visiting occasionally (28%, n = 13). Participants reported that they posted questions (43%, n = 20) more than they answered them (37%, n = 17), although the majority of respondents did not report either asking (58%, n = 27) or answering questions (64%, n = 30). The individuals who used VRS services visited VRS sites occasionally (74%, n = 14), with a much smaller proportion reporting more frequent use of either 1-3 times per week (22%, n = 4) or more than 3 times per week (6%, n = 1).

Key Themes

Based on the analysis of responses, findings were divided into four major themes: motivations for use, sources consulted, evaluation of service, and magic wand.

MOTIVATIONS FOR USE

Motivation is defined as an individual's internal need that guides subsequent behavior.[52] In the context of this research, motivation represents how users connect their information needs to the use of a specific service, whether SQA or VRS. Users can be motivated to either use the service or not use the service based on a series of intervening factors.

For VRS, the main factors affecting users' motivations to use or not use the service were quality (n = 39), satisfaction (n = 26), and variety of services (n = 25). For quality, users indicated that VRS services gave them information that was of good (n = 8) to high (n = 5) quality. As VS41 stated: "I normally use [VRS] for research projects. I'm very satisfied with the service, it's high quality. I like the instant messaging feature they have." However, as indicated in this response, users' motivations to use VRS for high-quality information depend on the type of question (n = 4), with users seeking out VRS to answer more complicated questions that rely on subject expertise (n = 4). However, users reported that sometimes the VRS librarian may lack subject expertise or contextual knowledge, which negatively affects the quality of the reference service: "You have to put a question in, and they are supposed to give you a librarian close to you, but sometimes they don't understand what you are asking, and I think that's poor quality" (VS55). As indicated by user VS55, the VRS platform may deliver a librarian not geographically co-located with the user, which may impede the librarian's expertise related to collection-specific questions.

After quality, the second factor most frequently mentioned by VRS users affecting their motivations for use was satisfaction (n = 26). Satisfaction is comprised of two elements—material satisfaction with an information system's performance and emotional satisfaction, which hinges on a user's expectations, goals, and specific tasks to perform (Bruce, 1998). The majority of users ranged from being satisfied (n = 5) to very satisfied (n = 7) with VRS services. Factors contributing to satisfaction were both material and emotional. One factor contributing to these high levels was a system-level (material) feature of instant messaging. Of the few users who indicated dissatisfaction with VRS (n = 2), one reason reported by user VS52 related to emotional satisfaction: "I wasn't satisfied with the hours the librarians are available. I wish it were 24 hours." In this example, VS52 had expectations of 24-hour availability for VRS that were not met by the service.

On almost equal footing with satisfaction, variety of services (n = 25) was the crucial third factor that impacted user-reported motivations for VRS use. This factor denotes the level of flexibility for VRS in providing services relevant to a variety of information seeking contexts. As user VS42 reports: "I use [VRS] when I was taking sociology, psychology, accounting, online classes; they were very useful especially when it came to finding resources for term papers or just writing a paper in general." For this user, VRS was successful in addressing a variety of academic subjects. Other contexts VRS discussed as reported by users were: a variety of services including help finding resources (n = 11) and with user accounts (n = 1), and answering nonacademic questions including personal (n = 1) and marketing/advertising (n = 1) ones.

Other factors mentioned by users as motivations for VRS use were: ease of use (n = 14), convenience (n = 6), as a secondary option after a failed web search (n = 6), accessibility (n = 4), and to facilitate "one on one" communication (n = 3). In some instances, users reported a lack of awareness of VRS (n = 4). One user noted that VRS was a good concept in theory, but not in practice: "I've already Googled it and can't understand it, so I need someone to explain it to me in a different way. It's good, but it didn't help very much. I think it's a good concept; however, they show you the page you need, but they don't really explain it that much" (VS45).

For SQA, the main factors influencing user motivations were quality (n = 25), satisfaction (n = 14), and information relevant to a specific subject (n = 10). The first two factors, quality and satisfaction, parallel those mentioned by VRS users. Where they differ is that SQA users report receiving answers of more variable quality (n = 10) than a good quality (n = 5). Further, users find information from SQA to be lacking in reliability (n = 5) and credibility (n = 5). One reason why individuals still may be motivated to use SQA despite this variable to low quality of answers is that when they do receive high-quality answers, they come from a subject expert: "someone responding has expertise that is relevant to what you are asking" (VS42). Subject expertise is also reported as a motivation influencing satisfaction with the service (n = 3). Other factors impacting satisfaction with SQA are easy to access and use (n = 6), timeliness (n = 2), a variety of opinions and experiences (n = 2), and detailed information (n = 1).

Another factor impacting users' motivations for using SQA was that this service provided information relevant to a specific subject (n = 10). Users appeared to value SQA for its ability to connect them with information about specific, sometimes esoteric topic areas: "I build a lot of model airplanes and Yahoo Answers! are good for specific questions like what the tarmac was in WWII that are hard to find by just searching" (VS3). Another user VS31 indicates using SQA to address: "a specific question that other information sources may not specifically address" (VS31).

A final key difference between reported motivations for SQA use as compared to VRS is that the former has more affective elements, including facilitating human interaction (n = 7), the elicitation of personal feedback (n = 5), altruism (n = 3), and in one case, having fun (n = 1). These affective elements were mirrored in users who reported their motivations for using SQA to answer questions, citing altruism (n = 9) and belongingness (n = 5) as critical factors. As user VS57 recounts the decision to answer a question on SQA: "I just thought, 'This is so awful! This poor girl!' and I thought just maybe she'd listen to my answer reassuring her." Other elements motivating users to answer others' questions had to do with their perceived subject expertise (n = 5), serendipity in stumbling onto a question they knew how to answer (n = 4), and the gamification elements of the service (n = 3).

SOURCES CONSULTED

Both VRS and SQA users were asked what sources they would consult when looking for information outside of their area of expertise. The top sources named were social search (n = 19) and Google (n = 17). Social search entails online information seeking in which an individual consults social resources such as friends, subject experts, or unknown people online. Interpersonal sources identified included peers (n = 7), professors/teachers (n = 4), experts (n = 4), librarians (n = 3), and colleagues (n = 1).

When in a situation where users felt the need to contact subject experts, their choice of the communication medium to do so varied based on their relationship with the expert (n = 10), followed by what would give them the most high-quality information (n = 3). Whom users identified as subject experts hinged on their personal networks (n = 12) and confidence that the expert would know the answer (n = 11). In some cases, knowing that the expert would be able to find the answer (n = 5), trusting their answer (n = 5), and would be able to understand the user's query (n = 6) was enough for the user to frame that person as an expert.

Following social search was Google, which seemed to be the next relevant option if a trusted interpersonal source was not available: "I guess usually Google unless I specifically know a person that I think that person would know the answer" (VS57). Many users mentioned either using or thinking about using VRS (n = 39). Making a move from thinking about VRS to actually using it appears to depend on the information need (n = 9): "I'll use ask-a-librarian if it's the night before my project and the library's closed. When my other options fail, basically" (VS45). Most often, users reported using VRS if their information need was educational or research-based (n = 6).

Although a higher number of users reported at least considering VRS when having a question outside of their expertise area, and also designated the high levels of quality and satisfaction found within VRS as motivating their use, overall, as reported in the *Demographics* section, there were more regular users of SQA than VRS. One reason for this discrepancy may be explained by the fact that many users did report using Google and other search engines as an information source; another may be that it is challenging to identify VRS users because of privacy restrictions implemented by VRS providers and librarians. Through these searches, VRS users often indicated (n = 17) being pushed to SQA sites indirectly. According to user VS35: "I basically looked up the question on Google, and the first thing that usually comes up is Yahoo! Answers, for my types of questions at least." Even when users reported directly visiting SQA sites for information (n = 9), the majority (n = 6) searched these sites for prior questions and answers relevant to theirs: "I went to Yahoo! and I typed in the main words of my question, and it's usually the second or third thing to pop up and clicked that" (V18).

EVALUATION OF SERVICE

Users were asked to evaluate VRS and SQA. For VRS, users mentioned a variety of factors they identified as necessary for evaluation. These factors were accessibility (n = 7), rapidity of information delivery (n = 6), reliability (n = 5), personal connection with a subject expert (n = 5), variety of sources (n = 3), knowledge and expertise of the librarian (n = 3), additional assistance (n = 2), and the simple fact that the service is "easier" (n = 1). When compared to a few key factors motivating VRS use (quality, satisfaction, variety of services), the more diverse factors impacting users' evaluation of VRS suggests that there may be a communications gap between what VRS can deliver for users versus users' perceptions of the service.

For SQA, users evaluated the service based on its delivery of varied opinions (n = 13); trustworthiness (n = 9), with users split on whether to trust (n = 5) or not trust (n = 4) results; its relational characteristics (n = 9); and the similarity of SQA content to users' information needs. These results parallel users' identified motivations for SQA use related to its affective components. Users' identification of the variable quality and satisfaction of SQA as affecting their motivation to use the service appears to translate into whether they consider the service to be trustworthy. Underlying the variability of trustworthiness is the perceived absence of traditional subject experts: "It's serious but not something you can reference because it's a free service and not recognized by anything except Yahoo!" (VS19). Finding information relevant to the users' information needs may parallel how users often access SQA services either indirectly or directly, but without asking a question and instead by searching archived content. For instance, user VS24 notes that they often assess relevancy by looking through archived SQA content and "see[ing] other answers that are similar to what I'm looking for" (VS24). Perhaps not surprisingly, SQA users report using information from these services to inform further searching (n = 24) more often than for direct decision-making (n = 16). This use is likely influenced by their variable trust in the information received.

For VRS, the CIT was used to elicit past experiences of successful and unsuccessful interactions utilizing this service. VRS users who had successful experiences noted they were for search help (n = 11), ranging from basic (n = 8) to advanced (n = 3), and to find articles (n = 5). Several other experiences noted by participants tended to coalesce under a broader umbrella of library-specific reference services, such as help with formatting (n = 1) or locating a book (n = 2). Less often mentioned were successful experiences that hinged on librarian subject expertise (n = 2) or credibility (n = 1). Reasons identified by users as contributing to a successful experience include fast delivery of the needed information (n = 6), provision of good answers (n = 6), and the ability to deliver the information (n = 4). Other reasons less mentioned also clustered around elements of service excellence, such as providing help until the user learned (n = 2) and providing enough information so that the user did not have to follow up (n = 2).

While many respondents did not have any unsuccessful VRS interactions to speak of (n = 10), those that did identify experiences with accessing library resources (n = 3), searching the library website (n = 1), formatting (n = 1), and asking an IT-related question (n = 1). Some of the reasons these interactions were considered unsuccessful had to do with the irrelevance of the answer to the user's initial question (n = 6), wait time (n = 3) and time pressure (n = 3), issues with systems (n = 2) or lacking collections (n = 1) interpersonal dynamics, such as the librarian being dismissive (n = 1) or blaming the user for the failed search (n = 1), and the librarian's lack of subject expertise (n = 1).

As subject expertise did not appear to be a significant factor addressed by users when evaluating VRS, it also varied in level of importance when users were asked about it directly. Specifically, half of the users (n = 10) said it was very important that a VRS librarian had subject expertise, while the other half was divided between subject expertise being fairly important (n = 6) to not important at all (n = 4). In fact, user VS42 "didn't know that librarians specialized in subject areas," and said that what's most important is high-quality service. The librarian must be able to "direct me where to go" (VS42). This perspective is also reflected in users reporting that they have never asked for a subject specialist (n = 8) versus asking for a subject specialist (n = 4). Reasons for wanting to speak to a subject specialist varied. Some wanted a subject specialist all the time (n = 3), but most others wanted a specialist for specific situations, such as when they have limited knowledge or expertise (n = 2), for a high stakes situation (n = 1), or to clarify their question (n = 1). Connecting these findings to the CIT questions about successful and unsuccessful VRS services, it appears that most users tend to evaluate VRS based on service quality more often than subject expertise, and therefore, do not prioritize the latter in their evaluations. When users were asked about how they would evaluate a librarian with subject expertise, they addressed factors like the ability to address the information need (n = 13) and trust (n = 11) as important to consider. User VS44 notes the unique need for subject expertise in the following quote: "Usually the general public don't have too specific of questions, but if you're working with a special institution, I would want someone who has knowledge of the topic I'm looking for because it usually means they have more experience looking for the answers" (VS44).

MAGIC WAND

Participants were asked a magic wand question, which asked them to describe the perfect site for all of their information-seeking needs. Their replies were divided by answerer expertise, site interface and display, communication between askers and answerers, cost, and reward and recognition for answerers. The majority of users stated they wanted experts to address their questions. As user VS65 says: "I would probably want someone who has some sort of expertise in that subject, not just some random guy who thinks he's right." Most users preferred that this expertise comes from formal education (n = 20); however, a subset (n = 10) believed that people "who have definite real-world experience" (VS31) could be considered experts, even if this expertise did not come from formal training.

When discussing the site interface and display, users often compared their proposed site to existing ones (n = 22), such as Google (n = 8). Desired site features included information organized into facets, or categories (n = 13) and a search bar (n = 8). Less prevalent, but also discussed were display features, such as the presence of colors that "appeal to people's eyesight" (VS62) and the use of avatars (n = 2).

Decisions over how users would communicate were divided among asynchronous (n = 5) and synchronous—with named synchronous options including Skype (n = 3) and IM/chat (n = 2). Users reported the need for communications to be convenient (n = 10), facilitated by the site design: "It'd be very, very user-friendly and simple to work with . . ." (VS68).

Users were less concerned with cost and rewards and recognition for answerers. For cost, users were split between a free system (n = 3) or having a paid (n = 2) or tiered plan (n = 1). Two users mentioned that the site should have a reward or recognition mechanism similar to the gamification elements included on many SQA sites: "People post their questions on there, and they get points for it or rewards if you post the answer" (VS29).

DISCUSSION

Based on these findings, what can VRS and SQA learn from each other concerning user motivations, expectations, and use of these services? Informed by participant accounts, VRS functions well in addressing a variety of information needs within academic and institutional information-seeking situations. Participants reported high levels of both quality and satisfaction with the service. These findings echo those from other research studies, which position VRS as addressing fact-based, often in-depth questions that require subject expertise and prioritizing the process behind delivering these answers.[53]

Despite a high number of users reporting at least considering using VRS, few actually said they used the service, but were only thinking about using it. What these findings seem to suggest is that a gap exists between what users expect from a VRS, when they are motivated to use it, and how they actually use it. While users understand the strengths of VRS in theory, in practice VRS simply is not the first resource that comes to mind when addressing their information needs. This finding parallels Zhang and Deng's finding that the majority of surveyed online Q&A users were not aware of VRS. Even those who were aware identified barriers to use of VRS, namely unfamiliarity with the service and the perceived difficulties of using VRS.[54]

Further, those who did use VRS reported not asking for librarians with the necessary subject expertise despite stating that they prioritized expertise when answering the magic wand question. This finding highlights the importance of VRS librarians fostering a "culture of willingness" to collaborate with other subject specialists both outside of and *within* their subject areas to ensure high-quality, exhaustive answers rather than presuming that the user will necessarily ask for a subject expert.[55] Further, since users prioritize service quality over expertise, it is essential that VRS training continues to focus on customer service skills.[56]

One reason why this gap between user consideration of VRS versus their actual use of the service may exist is that VRS does not align with how users typically look for information. Confirming findings from past research, users overwhelmingly identified Google as their first resource when seeking any kind of information.[57] Often, Google would indirectly lead them to SQA sites. SQA research has responded to this and similar findings by investigating methods to best match a user's question with archived SQA content.[58] VRS, on the other hand, does not have similar archived question-answer pairs, meaning that users are less likely to stumble upon these services when engaged in typical information seeking situations. Based on this finding, it is perhaps not surprising that when individuals were asked what their ideal site to fulfill their information-seeking needs would look like, they said that the site would have similar aesthetics to those that they frequently pursue, including Google.

VRS also lacks some of the affective elements that users reported valuing when information seeking. Users reported consulting known interpersonal sources for information, deciding on the communication medium based on their relationship with the source. This observation reflects the importance of a person's social network to their information seeking behaviors.[59] Further, a stated motivation for the use of SQA services was for its affective elements, such as a resource for advice or entertainment, or to demonstrate altruism when answering others' questions, confirming previous research findings.[60] These elements are missing in VRS interactions, mainly when the librarian is unknown to the user.

Users indicated that despite its named advantages, SQA had significant disadvantages. The results are of variable quality and satisfaction; users also report that trustworthiness is not a significant factor in their decision to use SQA. Perhaps, as a result, users said that they employed information from SQA to inform future searches more often than to make direct decisions.

Based on the connections made between VRS and SQA and informed by prior research,[61] the research team can make several design recommendations for VRS services. These recommendations are:

- **Archive VRS transcripts for Search Engine Optimization (SEO)**. If people are using Google to look for information and getting an SQA site as their first hit because it uses natural language, perhaps more library websites should publicly list and archive their questions and answers so that they may also be retrieved by search engines.
- **Emphasize subject experts in service delivery**. In prior research asking academic librarians to compare SQA to VRS, Shah and Kitzie found that librarians would limit referrals of subject experts due to perceived time constraints.[62] However, as indicated by this research, users envision timeliness and convenience as two separate

factors. Users are willing to wait if this wait signifies delivery of a relevant answer that they may not have been able to glean from a search engine or SQA site. Therefore, VRS librarians should collaborate via consortia to connect individuals with subject experts at the beginning of the reference interview; further, librarians need to revise their VRS scripts and site design to make the user aware that this option is available. For instance, users could have access to a drop-down menu to select a librarian with related subject expertise when asking a question. Or VRS could push to users pop-up chats at times of need, such as when a user's search retrieves no results from a library website search or when a user spends a certain number of seconds on the library website with no activity.

- **Importance of VRS interface and display design**. As indicated by user responses for the magic wand question, aesthetics are important. In fact, aesthetics may be more important than mode of communication—as users seemed to prefer asynchronous over synchronous resources. Therefore, when designing VRS resources, librarians must think beyond emulating a chat window to creating other asynchronous resources, such as a Q&A archive, which looks like sites and tools users are already familiar with.
- **Integrate VRS and SQA**. Some aspects of SQA, particularly its provision of varied opinions and its relational elements, may not be able to be replicated entirely in VRS. But VRS can include options for more information on a specific subject from a variety of sources, as well as push to SQA sites when questions may require affective factors beyond what a librarian could reasonably provide. VRS services can also offer additional resources beyond Q&A services, such as online support groups. In an academic context, for example, VRS could offer a support group for first-year undergraduates, individuals as divided by academic disciplines, and graduate students. Further, VRS should work with SQA so that the latter would push requests that require high-quality, trustworthy information to a librarian.

CONCLUSION

Informed by fifty-one in-depth user interviews, this study investigated the motivations, expectations, assessment, and use of online Q&A services. Online Q&A services are a fruitful context for investigation given the continuing rise of people's social search in digital environments. It is one of the few studies to make a direct comparison between VRS and SQA services. Making this comparison is vital since prior research has indicated that both services are not in competition, but instead are complementary.

This study is not without limitations, offering a snapshot of user perceptions during the study's data collection period. The telephone interview medium limited the contextual richness of interviews since the team missed additional FtF information like facial expressions. Further, the sample was nonrandom, meaning that the results are not generalizable to all VRS or SQA users. Additionally, it is likely to have had an underrepresentation of VRS users due to the privacy restrictions of libraries in protecting user identity. Despite these limitations, these findings deepen our understanding of an exploratory, qualitative issue that requires additional research to test our emergent codebook further.

Research findings suggest that online Q&A users do not necessarily take advantage of the observed complementarity between SQA and VRS. Instead, most users reported using SQA services even when they did not adequately meet their expectations for quality and satisfaction. A key reason for this heightened use of SQA services as compared to VRS can be attributed to the integration of SQA into the way most users reported seeking information. Search engines like Google, as well as social search sites based on users' networks often connected them to SQA sites indirectly. In this way users sometimes satisficed by using SQA services when requiring subject expertise but sacrificing the desired quality and satisfaction in doing so.[63] This finding suggests that there are other contextual factors at play beyond a user being aware of the information need and the sources available to meet this need. Instead, our findings suggest the need for VRS to change how they are presented and increase their integration with other digital sources to better match how individuals commonly look for information online. This change is critically important now, given the impact of the COVID-19 pandemic and its aftermath on library reference services. Individuals have had to face the complete absence of FtF services and the necessity of relying more fully on our virtual presence. Virtual services in the ideal strive to be reassuring, enduring, and effective. This research pushes us to be more collaborative, open, and available.

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