From the President of RUSA

Information Changes Everything

Ilana Stonebraker

Information changes everything—especially at the reference desk, where every interaction opens up a world of knowledge, guidance, and support. Here, librarians aren't just answering questions; they're empowering patrons complex information landscapes with confidence and clarity. In these moments, we use our skills to make information accessible, relevant, and meaningful to each unique user. In this column I'll introduce some of the ways our work is changing, and how RUSA is changing with it.

We're thrilled to introduce our new interest group, AIRUS (Artificial Intelligence in Reference and User Services). AIRUS will explore AI's impact and potential in our field, setting the stage for thoughtful discussions and transformative ideas. Furthermore, the 2025 ALA RUSA President's Program will gather together a panel of thought leaders in public and academic libraries. Speakers, including Bohyun Kim, Dr. Brandy McNeil, and Nick Tanzi, will explore the challenges of misinformation and the importance of fostering thoughtful digital citizenship. This program promises valuable insights for anyone invested in the future of library services.

Another core focus is on enhancing how we meet our users' needs under the banner of equity, diversity, inclusion, and accessibility (EDIA). Our 2025 RUSA Forum's theme "Meeting Users' Needs (EDIA)" will explore how libraries serve an increasingly diverse set of users with intersecting needs—spanning sociodemographic backgrounds, cultures, neurodiversity, sexualities, races, gender identities, and beyond. By acknowledging these differences, we create opportunities to serve all patrons better and learn to adapt our services to meet our communities where they are. Through this, we can ask ourselves not only "What do we know?" but also, "How are we bringing these groups to the conversation to help us build better practices?"

I'm pleased to share that this year marks our third consecutive fiscal year that RUSA has reported surplus revenue. This achievement speaks volumes about the hard work and dedication of our members and reinforces RUSA's path toward financial stability after several years of financial turmoil. As part of our continued growth, we're reviewing RUSA's bylaws to ensure they align with our evolving mission. Meanwhile, a new Fundraising and Sponsorship Committee is working to bolster our long-term sustainability.

It's exciting to share this update in *RUSQ*'s second issue of its relaunch. Reference professionals truly change everything, and I can't wait to see what opportunities we'll create together in our coming year ahead!

Correspondence concerning this column should be addressed to **Ilana Stonebraker**, RUSA President, e-mail: is1@iu.edu.

Alert Collector
Matthew Galloway, col. ed.

Looking Inside

What Coloradans Who Are Incarcerated Like to Read

Erin Boyington

A recent episode of the Pulitzer-Prize-winning podcast *Ear Hustle* titled "A Little Streets, a Little Romance, a Little Deception," explores the reading tastes of incarcerated people in San Quentin, a California prison. The episode was so funny and insightful it inspired me to write about what people read in our Colorado prison libraries, with the hope that it will provide collection development guidance about what books this underserved population loves to read. Donations are a lifeblood to so many prison libraries, but unfortunately much of what is sent by well-meaning donors doesn't meet the needs of the readers I serve.

My first library job was at one of Colorado's largest prisons in Sterling, where two libraries serve residents at every custody level. Later, I went to the Colorado State Library's (CSL) Institutional Library Development (ILD) unit. We train institutional library staff statewide, standardize and improve services, and best of all, spend collection development funds for nearly 40 institutional libraries, including the Colorado Department of Corrections' (CDOC) 22 state prison libraries, which serve around 17,000 people (https://cdoc.colorado.gov/about/data-and-reports/statistics). Our goal is to provide high-quality library services and spaces comparable to community libraries.

CDOC's libraries benefit from a shared ILS that allows ILD insights into which items are most used by incarcerated patrons. In 2023, ILD created a form on library computers so residents can submit purchase requests directly to us, and we designated a large part of our regular collection development budget to purchase requests, high-holds, and high-circulating materials. After the first year of this strategy, one grateful and loquacious resident told us, "As a side note I do want to mention that while under incarceration, having been removed from the normality of regular society, the smallest [gestures] mean much to us. With that in mind, when we do receive new literature or media, it is indeed a joyous moment as it helps us ease the time away and slip into the realm of whatever we have our focus vested in and for that, we extend sincere gratitude to whoever cares enough to help use while we're on this journey of correction, rehabilitation, and redemption." Less effusive feedback came from another resident: "I mean, we don't always get what we want. At least we get some say in the matter."

In summer 2024, a University of Denver library school graduate student, Tyler Real, interned with ILD. As part of his project, he worked through CDOC circulation data for titles that were ordered based on patron requests and holds in a previous fiscal year. He cleaned up spreadsheets, crunched numbers, and let us know that on average, we spent an average of $3.78 per checkout for the 5,786 books (1,151 unique titles) we purchased with funds earmarked for patron-driven requests.

Erin Boyington, MLIS is the Adult Institutions Senior Consultant at the Colorado State Library, Denver, CO.
Correspondence concerning this column should be addressed to Matthew Galloway, Collection Development Librarian, Anythink Libraries, Northglenn, CO; e-mail: mgalloway@anythinklibraries.org.

I've used Tyler's research throughout the article. $3.78 is a tiny drop in the bucket when it can cost upward of $40,000 to incarcerate a single person for a year. I've also included quotations from residents that came from focus groups conducted by the Colorado State Library's Library Research Service (https://www.lrs.org/prism-toolkit/).

Our incarcerated patrons, especially those with long sentences, might read their way through huge swaths of a collection, and it's a challenge to keep ahead of them. One reader in my libraries loved westerns and could tear through several in a day. He would start in the fiction with the "As" and read his way through the alphabet, starting over again once he was through. Another devoted series reader once spent a good part of an hour patiently rejecting my suggestions while I desperately wracked my brain for a single romantic fantasy series we owned that this person hadn't already read. It was my first failure as a readers' advisor and is seared into my brain.

Prison library users are best described in one word: insatiable. Time can hang heavily, and everyone copes by filling up their days with as many activities as they can, limited by prison schedules and the availability of authorized programming. Some focus on official jobs or education, some create make-work, and a few choose destructive activities that antagonize correctional authorities and lead to further cycles of punishment and loss. Libraries provide a safe outlet for self-directed activities and the rare opportunity to express individual choice, judgment, and taste.

Some come to reading for the first time in prison, stumbling onto it as an activity only because they can't afford a TV and their cellmate hands them a random book with the instructions "read this." There are many emerging readers who need books for adults that hold their attention and don't have a vocabulary that is too demanding. They might first sharpen their skills on Ashley and Jaquavis' Cartel series or with the ubiquitous James Patterson before branching out into other interest areas that are unpredictably varied. Others are lifelong readers, some holding advanced degrees. As with any population served by a library, there is a diverse range of interests the collection must serve.

Censorship is a daily prison reality, though Colorado is miles ahead of many states in having a detailed policy and a process for appealing decisions. The policy has even relaxed in recent years. Erotica is now allowed, and books containing images considered "sexually explicit" are exempted from censorship for reasons that I remember with the mnemonic LESAH—books with literary, educational, scientific, artistic, and historical value. Still, it's impossible to talk about what's popular without detailing how censorship encroaches and restricts many high-interest books.

Sine Qua Non—Without These, Nothing

Dictionaries

What is the number one most essential book for people who are incarcerated? A dictionary. With no access to texting, emails, or word processors with autocorrect, people are suddenly forced to rely on means of communication that are alien for anyone under 40: handwritten snail mail. They need to be able to check spellings and look up definitions as they wrestle with the complexities of our legal system. Letters are the least costly way to correspond with romantic partners, friends, and family members. If CDOC gave everyone a mass market dictionary along with their prison-issue photo ID, it might finally meet the demand. When I was a librarian at Sterling, dictionaries were never on the shelf, either checked out or stolen. In recent years, ILD decided to "flood the market" for this scarce resource, buying hundreds of low-cost dictionaries and asking library staff to place all of them on

the shelves. For the first time, we seem to have made a dent in the demand—now when I visit one of our libraries, I usually see several dictionaries in good condition, waiting to be checked out.

Urban Fiction and Manga

Two other major interest areas have emerged in our data, and these books never come to us through donation: urban fiction and manga. They are also the most-censored categories of books in many prison libraries (though less so in Colorado because of its policy), which I think is because they are embraced by incarcerated readers but unfamiliar to staff who hold the power of censorship.

Urban fiction, aka street literature, embraces a diverse range of subgenres, with elements of romance, thrillers, crime fiction, and more. In our libraries, the most popular titles are read to tatters by devoted readers. (For the best introduction, check out the 2024 edition of Vanessa Irvin's *The Readers' Advisory Guide to Street Literature*.) CDOC's top-read urban fiction writers in 2024 include Ashley Antoinette and JaQuavis Coleman (writing separately or together as Ashley and JaQuavis), Tracy Brown, Duke C, Ca$h, De'nesha Diamond, Treasure Hernandez, India, K'wan, N'Tyse, King Rio, Nisa Santiago, Alexander Gordon Smith, Vickie Stringer, Kiki Swinson, Carl Weber, and Zane.

Manga is another genre that in years past we've neglected to buy in sufficient quantity, though our patron-driven focus means that these have become a new priority. Unfortunately, getting full series can be challenging and expensive for our limited budget, and even when series are still in print, many will be subjected to censorship. Some of the top series in CDOC in 2024 are Reiji Miyajima's charming romance *Rent-A-Girlfriend*, Yukito Kishiro's steampunk classic *Battle Angel Alita*, and Saizou Harawata's spicy zombie horror *Kingdom of Z*. Prison can be a stressful place to try to focus, so highly illustrated books and magazines helped one resident: "But, God, I found out I like comic books a lot. And the magazines we can only check out when we come down here. And I know a quick read in a magazine when you're just trying to get your mind off something helps a lot too, when you don't have time to focus on a whole book. Or your medication or the things going on in your life, don't really let you read a whole book without having other things go on at the moment because of your anxiety or whatever. And sometimes just quick reads like a comic book or magazine would be a lot more helpful to get your mind focused on other things."

I Read Because . . .

Several years ago, I ran some reports that gave me the top 15 titles for each of our 22 libraries and tried to find commonalities in lists that included an astonishingly varied array of books, from Sun Tzu's *The Art of War* to *The Complete Guide to Crochet Dolls and Animals: Amigurumi Techniques Made Easy* to Ashley Antoinette's *Money Devils 1: A Cartel Novel*. I tried to categorize all the types of books that showed up in those top 15 and found they included: classics, erotica, mystery, thrillers, science fiction, fantasy, urban fiction, art, crafts, music, biography, history, dreams, astrology, exercise, games, graphic novels, manga, language learning, nature, science, paranormal, conspiracy, poetry, religion, self-help, trivia, and true crime.

A truly exhaustive list of what people want would also have to include popular bestsellers (especially those recently adapted into TV or film), which incarcerated people hear about from magazines, television, friends, and one another. Stephen King's latest doorstoppers are always popular, and in 2024 *The Bazaar of Bad Dreams* was the ticket. Denis Villeneuve's *Dune: Part Two* isn't available to incarcerated people yet, but Frank Herbert's science fiction classic is in high demand. Pierce Brown's *Red Rising* and *Golden Son* both ended up on multiple CDOC libraries' top 15.

When I looked at the same reports again in 2024, the titles may have been different but similar patterns emerged. There are four themes that I think describe appeal factors for the most popular types of reading materials in CDOC. When incarcerated people read, they look for things we all seek in our regular lives and through reading: for distraction or to satisfy curiosity, to gain hidden knowledge and insights, to acquire useful knowledge, and for the excitement of experiencing sheer beauty. Sometimes multiple themes overlap in a single book, but I'll talk about each type in depth, with examples of some of CDOC's best-circulating titles from the past year.

Beauty and Excitement

Books that provide beauty and excitement include the most restricted books in a prison library. They are also, of course, the books that people most gravitate toward. In this category I would put all the gorgeously illustrated nonfiction and art books with heavy, coated paper. Most of the output from Dorling Kindersley goes in this class, like *A History of Magic, Witchcraft, and the Occult* (2020), *The Complete Dog Breed Book* (2014), *Zoology: The Secret World of Animals* (2019), and *Car: The Definitive Visual History of the Automobile* (2022). Beautifully illustrated books are too often jealously "protected" by staff to prevent mutilated pages or outright theft. Unfortunately, that kind of sequestration leads to heavily illustrated books getting less use, though they are some of the most expensive books we buy.

Art books are sought out for their beauty, along with all those wonderful Marvel and DC character encyclopedias. The hugely popular (and frequently censored) Spectrum art series, which collects gorgeous fantasy illustrations by contemporary artists, includes the most circulated book in CDOC: *Spectrum 24: The Best in Contemporary Fantastic Art* (2017). The single copy at the Limon Correctional Facility has apparently circulated 102 times since 2022, which hardly seems possible even for the best-constructed book.

The reason the Spectrum series are targeted for censorship is simple: lots of sexy women who make up for what they lack in clothing with horns, wings, and an occasional tail. Spectrum volumes 1, 10, 16, 18, 19, and 25 are censored in whole or in part—though volumes 2, 3, 7, 9, 20, 21, 23, and 24 are allowed. Volume 17 is listed as both allowed and denied. That's a common glitch in CDOC's homegrown censorship database since record-keeping of past decisions is not easily searched and not always checked before an item is flagged and re-reviewed when it comes through the mail room. You can imagine the confusion for anyone diligently trying to follow policy, given the volume of titles that enter in any given year. (Not only that, but images of female breasts—real, realistic, or cartoony!—tend to get censored even at women's facilities.)

That brings us to the word I've chosen to describe an aspect of some popular books: *excitement*. I put non-illustrated erotica in this category, including Zane's *The Heat Seekers* (2002) and two volumes of *Best Bondage Erotica of the Year* (2020 and 2021), edited by Rachel Kramer Bussel. I would also include exciting genres like thrillers and horror—books that aim to enthrall to keep readers turning pages. A resident at the Denver Women's Correctional Facility told us why she loved one of J. R. Ward's series: "I liked it because it wasn't just about one specific thing. It was action and love. And then there was the laughing because there was just so much joking in it. And that's what keeps me in the library."[1]

Adults who are in prison probably never dreamed of taking vows of celibacy, but somehow that is an expectation the government imposes upon them when they are locked up—no matter if they have two years ahead of them or the rest of their lives. A federal prison (not CDOC!) in Florence, Colorado, recently made the news for an abusive disciplinary policy of dousing anyone caught masturbating

with pepper spray.[2] Expecting people who are incarcerated to magically turn off their sexuality sets everyone up for failure, and the rampant censorship of "adult content," from nude images to erotica, is a symptom of this greater problem. Patrons have always found workarounds for themselves: spicy passages of novels get underlined or dog-eared, an underground advisory from reader to reader.

Sexually explicit books are not a security risk, nor can they be blamed for sexual harassment of staff. Censoring bestsellers like E. L. James' *Fifty Shades of Grey* created a black-market opportunity, since lists of censored books are difficult to check, and facility mail room staff simply can't keep track of the thousands of titles that have been designated as allowed or denied. I've been forced to discard copies of banned books donated by people leaving the facility. There are probably other copies of forbidden books floating around the facility, but a resident who wants to interlibrary loan a book would be denied the opportunity.

Motivated residents find other workarounds to evade censorship. My favorite prison library artifact was handed to me by a savvy clerk who simply said, "That book *isn't* that book." What he handed me proved to be generic thriller cover glued around a volume of Penthouse Letters, which then violated policy as erotica. Censoring erotica created a perverse incentive for smuggling and hoarding certain books.

But sexual expression isn't the only reason people appreciate beauty and excitement in literature. Prisons are noisy, stressful environments constructed of thick security glass, concrete, and painted cinder blocks. There is a dearth of natural features in most prisons—very few animals, trees, or streams to blunt the hard, colorless surfaces. A particularly lovely part of the *Ear Hustle* episode describes how one woman, Ms. Guidry, created a peaceful haven by decorating the walls of her room with books and colorful paper butterflies. There is a deep thirst for beauty in prisons, which beautiful books can slake.

Curiosity and Distraction

This is the second big category, where I put trivia, encyclopedias, games, crafting, drawing, and true crime. "Distraction" could obviously encompass all forms of reading while incarcerated, but I mean the kind of distraction that people on the outside satisfy by scrolling through random memes, news, and images on social media feeds. One resident told us, "I'm old and I'm a nerd. Yeah. And so I read a lot of science books. I have practically infinite curiosity, so I read pretty much anything that comes through."[3]

Curiosity is one of humanity's most appealing features, and people using CDOC Libraries seek out compendiums of facts, trivia books, atlases, encyclopedias, and almanacs as brain candy. The Guinness Book of World Records, Ripley's Believe It or Not books, Pathfinder role-playing guides, *Hoyle's Rules of Games*, and encyclopedias of dogs, myths, serial killers, and tattoo lettering all scratch the itch to learn something new. One resident told us about book that gave him new insights into the world of the birds in the recreation yard: "There was a lot of stuff I didn't know about birds. It's just something to read. I mean, it explained a lot about those black birds that are out there and how they communicate with each other and how they can actually tell humans apart. . . . They can actually tell us apart. We can't tell them apart. They're actually very intelligent, and they actually can communicate and mimic our voices if they are around you enough. I didn't know that. I hear them talking out there, but I didn't know that they were actually talking because they can't actually talk, but they are having a conversation."[4] You can hear the sense of wonder in his words.

This type of high-demand book also provides information about activities and skills that are relatively easy to acquire and sustain when resources are restricted. Language learning, beginning guitar, crochet (but not knitting!), drawing, calligraphy, and role playing manuals are all hobbies that can be cultivated with minimal supplies. An amigurumi, a crocheted stuffed toy, can allow someone with limited financial means to create a handmade gift for a loved one. A drawing can brighten a love letter for Valentine's Day. American Sign Language can aid communication across an exercise yard or noisy day hall, and in Colorado, Spanish is the most common language spoken after English.

An ink pen—in high-security prisons, they are sold without any outer casing and are called "flex pens"—and pieces of scratch paper can be relatively easy to get and keep despite regular, unscheduled searches of personal spaces where anything deemed "contraband" is seized and usually thrown away. People turn to writing and drawing to keep their hands and brains occupied, and the CDOC Libraries never have enough how-to-draw books in stock. Unfortunately, these too may be subjected to arbitrary censorship—a former supervisor, acting contrary to the written policy, had the power to censor most of our library's figure-drawing books because, in a twist of carceral logic, these books taught people to violate policy by drawing nude bodies. Lettering and calligraphy books are often confiscated because they *might* inspire tattooing (illicit tattooing is a real scourge in environments where horrible infections are all too likely). Though books don't cause illegal activity, they are blamed for people's rule-breaking and taken away preemptively.

Hidden Knowledge and Insight

Prisons are slow environments, until the moment things move very fast—which is always terrifying and dangerous. Bereft of options to occupy their time, people who are incarcerated turn inward. The person who finds religion in prison is a well-known stereotype. Many religious groups are eager to provide books and services, which can be a lifeline to the outside world. Joining an established religious group provides companionship, a getaway from the confines of a cell, and a positive activity to show a parole board. Colorado's prison library patrons use books to explore their interests beyond major religious groups: paganism, Santa Muerte, Toltec wisdom, and Native American spiritual practices, to name a few. One resident told us, "I've never believed in witchcraft until I could learn what it was. The book *Witch Life* was about witchcraft. All witchcraft is, it's not magic, it's not doing certain spells to somebody, it's doing spells to better your inner spirit. It uses oils, asparagus, olive oil, and you can do it in a restroom, or in a bathtub, or in a kitchen, or on a altar. Now that I've learned what witchcraft is, it's helped me so much."[5]

Some of the books about hidden knowledge and insight I also include in this category are conspiracy books (government coverups, cryptids, and aliens), dream interpretation dictionaries, astrology, and everything written by Robert Greene.

If you don't know Robert Greene's books, they are some of the most-circulated and in-demand titles in our collections: *The 48 Laws of Power*, *The Art of Seduction*, *Mastery*, *The 33 Strategies of War*, and *The Laws of Human Nature*. There are concise or daily meditation editions that further condense Greene's cynical, often contradictory dictums about how to manipulate others. They are basic self-help with a twist: a get-ahead-by-any-means worldview that correctional staff find unnerving, and often seek to censor. (A library colleague of mine was once investigated after unit staff overheard her discussing *The Art of Seduction* with a patron during a cell-side delivery.) Greene's oeuvre is a hard-edged update of Dale Carnegie's 1936 classic *How to Win Friends and Influence People*—and I've never seen anyone transformed into a master manipulator by reading a book.

The book *Sextrology: The Astrology of Sex and the Sexes* (2003) by Stella Starsky and Quinn Cox has been flying off the CDOC Libraries' shelves in 2024. Astrology puns sell! As does a romantic focus. People seek insight into themselves and their partners to improve relationships. We've only recently started stocking up on enough titles to meet the huge demand for astrology books. Unfortunately, I also spent money on copies of *The Astrology of Sex: A Guide to Cosmic Coupling and the Sensual Secrets Behind Your Sign* by Sarah Bartlett (2022) without realizing it included full-color photographs of some cosmic coupling. It still showed up at the top of our 2023 holds list, though it only circulated three times before being pulled from CDOC library shelves and censored statewide.

The allure of hidden knowledge also leads inevitably to books about conspiracies. David Icke's *Phantom Self: (And How to Find the Real One)* (2016) promises a peek behind the curtain of reality. Graham Hancock's *Fingerprints of the Gods: The Evidence of Earth's Lost Civilization* (1995) provides a tantalizing claim to illuminate ancient secrets. Leslie Rule's *Ghosts Among Us: True Stories of Spirit Encounters* (2004) raises goosebumps with uncanny stories of hauntings.

As with anything that people who are incarcerated gravitate toward, these books fall under institutional suspicion that often leads to censorship. Greene may merely be cynical, but Icke is notoriously anti-Semitic. When struggling with the censorship of conspiracy books, I often think of a former clerk of mine who loved them. A man in his thirties with a gentle voice and presence, he was in prison because of a mental health crisis that ended with him shooting at police officers who came to his house. Though he hit no one, he initially received the highest possible sentence for each pull of the trigger and each person he endangered. While incarcerated, shouldn't he be "protected" from books that might trigger a violent relapse? My answer is no.

My on-the-job experiences enacting censorship at my prison libraries gave me a firsthand glimpse at the arbitrary and demeaning assumptions censors make about readers' intelligence and capabilities. Censorship should not be implemented based on the most extreme individuals. Hard cases make bad laws. CDOC gave up on individualized censorship plans for sex offenders because they proved to be time-consuming, unworkable, and dangerous, since sex offenders are frequently targeted for violence. Censorship based on the brain chemistry of my clerk would infringe on the rights of every other incarcerated person. Finally, there is no way to draw a straight line from a book or a thought to an illegal action. Concocting disastrous scenarios of what *might* happen if someone reads a certain book is, ironically, just another form of conspiracy thinking.

Useful Knowledge

The final category, which contains nonfiction generally approved of by institutional authorities (though there are exceptions here, too) is that of *useful knowledge*. Design America Inc.'s *The Big Book of Small Home Plans* (2017) appeals to people dreaming of an affordable home when they leave prison. Petersen's *Master the CDL: Commercial Driver's License Exams* (2022) is widely studied, since commercial driving is a career path open to someone with a felony conviction. One resident in a focus group told us, "I'll get it to specifically look at things that I'm interested in for upon release. So for example, I checked out the CSL trucking book twice. That's something I plan on doing when I get home."[6] GED test prep, math practice, books about mastering coding or Windows products, carpentry, and forming a nonprofit—all of these topics are extremely useful for a person preparing for the challenges of reentry. *Systemic Racism 101 : A Visual History of the Impact of Racism in America* by Aminah Pilgrim (2022) quantifies a world that incarcerated readers already know intimately.

Fitness is an important hobby, not just to pass the time but also for personal protection. Fad diet books are less useful than exercise manuals, particularly ones that focus on bodyweight exercises or equipment-free workouts. *Jailhouse Strong* by Josh Bryant and Adam benShea (2013), a self-published book that draws inspiration from prison workouts, is the single most-circulated exercise book in CDOC. The others on the top 15 lists focus on strength training and muscle building.

Obviously, this category overlaps with curiosity and distraction. The difference is that curiosity and distraction may not be applicable to life outside, while "useful knowledge" is intended to be used as preparation for reentry. Though specific titles in these categories don't show up in the 2024 top 15 lists, books about money management, real estate investing, and business planning are also hugely popular.

Some how-tos are frowned on by institutional authorities, who point to security risks to the facility. Camping manuals with instructions on fire-starting, survivalist guides with diagrams of unarmed self-defense, and even Erin Bried's pink-covered adulting manual, *How to Sew a Button: And Other Nifty Things Your Grandmother Knew* (2009) got a few pages formally censored because of instructions on brewing homemade dandelion wine. These are topics that there are specific penological reasons for keeping out of a prison library—though it should be said that many old-timers are deep repositories of practical knowledge and don't need books to know the finer points of crafting a tattoo gun or brewing hooch.

Conclusion

Censorship is an inescapable burden when choosing books for a prison library collection—though as bad as it can be, it is not the biggest problem for prison libraries. The biggest problem is a lack of budgets, which leads to shelves crammed with low-quality donations. Without new materials selected to meet the specific interests and needs of patrons, prison collections tend to be worn-out, outdated, and overstocked with books written for, by, and about white people. Disposing of books that are wrong for the collection is its own challenge, taking staff time and expertise. The books readers are given should never have missing pages, mystery stains, or outdated information.

Outdated books are an urgent problem. You wouldn't hand someone spoiled milk to drink, so why would you hand them expired medical or legal advice? If a book about health doesn't even mention COVID-19, it's probably not a reliable resource for an information-impoverished reader who cannot double-check information against other sources. Libraries are trusted, so it's essential that the materials on their shelves be up to date. Readers in prison deserve better books than they usually get through random donations. (Please note—I am *not* talking about the many books to prisoners organizations, whose volunteers strive to provide materials by request and have to hurdle countless obstacles to get well-chosen books into prisons and jails.)

Not only that, but readers should have access to books that act as "mirrors, windows, and sliding glass doors."[7] It's easy to get donations of *New York Times* bestsellers of the past decade (lists that are historically dominated by white male writers) but not easy to get genre fiction by Black and Hispanic writers, or current nonfiction that contains useful knowledge. Those much-needed books always require designated budgets and professional selection.

Since a library is a growing organism,[8] there must be outflow as well as inflow. Each book that lives on the limited shelf space of a prison library must earn its place. ILD asks CDOC library staff to think "Would you take this book to bed with you?" because incarcerated people don't have many places to read outside of their cells. On the other hand, to reassure readers too often made

anxious by ongoing experiences of having property arbitrarily confiscated, prison libraries must make the process transparent and emphasize that books are only being removed because they are inaccurate or too gross to be used. I used to do my weeding during open hours so curious patrons could inspect the piles of books I was making. "You have a save," I would tell them cheerfully. "Check any book from this stack out, and I won't weed it." No one ever took me up on the offer.

People who are incarcerated should have a selection of physically clean, appealing, diverse, and up-to-date books to engage their curiosity, distract them from their circumstances, prepare for reentry, allow them to pursue insights about themselves, explore the world, and to satisfy the innate human desire to experience beauty. Really, is that any different than readers from any public library anywhere?

References

1. "PRISM Project Toolkit," Library Research Service, https://www.lrs.org/prism-toolkit/.
2. Jennifer Brown and Olivia Prentzel, "Masturbating Inmates Pepper-Sprayed, Restrained, Forced to Wear Yellow Cards at Colorado Federal Prison, Report Says," *Colorado Sun*, July 15, 2024, https://coloradosun.com/2024/07/15/masturbating-inmates-florence-federal-prison/.
3. "PRISM Project Toolkit."
4. "PRISM Project Toolkit."
5. "PRISM Project Toolkit."
6. "PRISM Project Toolkit."
7. Rudine Sims Bishop, "Mirrors, Windows and Sliding Glass Doors," from *Perspectives: Choosing and Using Books for the Classroom* 6, no. 3 (Summer 1990), https://scenicregional.org/wp-content/uploads/2017/08/Mirrors-Windows-and-Sliding-Glass-Doors.pdf.
8. "Five Laws of Library Science," *Librarianship Studies & Information Technology*, September 11, 2022, https://www.librarianshipstudies.com/2017/09/five-laws-of-library-science.html.

Amplify Your Impact
Yvonne Dooley, Col. Ed.

Creating a Bespoke Approach to Community Engagement

Influencer Marketing for 21st Century Libraries and Archives

Nicholas A. Brown-Cáceres

Let's face it. The past few years in library and archives land have been extremely trying for everyone, whether you are a seasoned professional with extensive experience, a new colleague, or a customer. The pandemic, budget austerity, divisive political environment, and onslaught of attempts to censor inclusive stories from school libraries, public libraries, and K-12 and post-secondary curricula have taken a significant toll.[1] As digital connections played an essential role in keeping our institutions relevant during the first 12–18 months of the COVID-19 pandemic, our profession is having a renaissance in understanding how to leverage social media to amplify positive stories about our people, collections, services, and communities. It is high time for information professionals—beyond just communications, marketing, and community engagement-focused colleagues—to formally understand the power of influencer marketing in deepening sustained engagement with users.

Since 2023, America has been exposed to the reinvigorated concept of "Library Joy," made famous by the librarian Mychal Threets (@mychal3ts), among countless other information professionals active on social media. Extensive media coverage (including in *Rolling Stone* magazine), viral social media content, and even a line of merchandise from Out of Print signal that Threets' message resonates with the public and serves as a solid counter to the coordinated effort to chip away at the freedom to read. This content creation and seemingly organic engagement with an industry influencer is much more strategic and deliberate than many may realize. Threet's rise to fame is without question the influencer marketing story of the moment, building on the TikTok excellence modeled by Milwaukee Public Library since 2020, and the Linda Lindas' 2021 "Viral Library Gig" (NPR) at the Los Angeles Public Library (LAPL) that led to a record deal.[2]

This column observes how influencer marketing is utilized in the information profession for customized engagement efforts while demystifying how to do the work. The discussion offers a definition of "influencer marketing" as applicable for libraries and archives, explores several case studies of effective influencer engagement, and establishes a playbook that institutions can adapt to start, grow, or sustain their influencer strategy. Libraries and archives of any size or type should

Nicholas A. Brown-Cáceres is the Assistant Chief of the Music Division at the Library of Congress exploring the topic of influencer marketing. In 2021, he received the *Library Journal* Marketer of the Year Award in recognition of his collaborative approach to library marketing and community engagement during the COVID-19 pandemic.
Correspondence concerning this column should be directed to Yvonne Dooley, Business Librarian and Copyright Specialist, University of North Texas Libraries, Denton TX, email: Yvonne.Dooley@unt.edu.

consider adopting influencer marketing to serve their strategic communications and community engagement goals, whether they have one staff member or 3,000.

What is Influencer Marketing?

Influencer marketing is a relatively recent subspecialty of marketing that has taken hold in the digital age, yet the principles are as old as advertising. Leveraging celebrity or individual influence has been a part of modern society since the 18th century, when—according to *Forbes*—the Wedgewood company in Great Britain marketed royal endorsement of their products to prospective customers. Peter Suciu observes that what we now recognize as social media influencers emerged as a trend and concept in the mid-2010s with the rapid growth of major social media platforms like Facebook, Instagram, Twitter (now X), and YouTube.[3] Communications and marketing professionals, and anyone interested in this area of expertise, can now take university or massive open online (MOOC) courses in influencer marketing. There is also a growing professional and scholarly literature that analyzes the role and power of influencer marketing, primarily produced in the communications and marketing field.

Influencers are prevalent in communicating about any industry that relies upon engagement or transactions between an entity and individuals to exist and thrive. In any local community, you can find food, literary, real estate, travel, cultural, political, sports, and education influencers, among countless others. Chan-Olmsted and Kim describe influencer marketing as follows: "The practice markets influence by capitalizing on key individuals' persuasive power over their social networks."[4] The concept is quite simple and is something that many information institutions and related entities have engaged in for decades. What is different now is that the role of influencer has been somewhat democratized through social media. In decades past, the term influencer would have only applied to celebrities or people with a certain social stature. In contrast, now there are influencers of all ages "breaking the internet" with viral content that builds their following and formalizes the value of their platform(s) to prospective entities trying to reach their audiences.

A prime example of this phenomenon is Marcus Johnson, a student at Oakland University in Michigan, whose post-Vice-Presidential Debate MSNBC interview on October 1, 2024, went viral for its hilarity and frankness about the 2024 presidential election campaign. Now known as "civics guy," Johnson's voice now has significant national reach among civically engaged social media users. A single TikTok post on MSNBC's account about Johnson has 2.2 million views and his X account grew to almost 50,000 followers in less than a week.[5] There are always new people assuming informal or formal status as influencers.

Libraries and archives have engaged in influencer marketing for decades. The American Library Association's (ALA) beloved celebrity "READ" posters are a perennial favorite at the national level. Dating back to 1980 with an inaugural appearance by Mickey Mouse and formalized as a series in 1985, the posters can be found in many school and public libraries across the country, always featuring recognizable entertainers, civic leaders, and pop culture characters, ranging from Taylor Swift to Snoopy.[6] The posters are an iconic tool for broadly promoting literacy to multigenerational audiences. Many US-based readers undoubtedly recall seeing these posters at some point in their youth, speaking to the impact of their sustained qualitative impact.

Another staple of library influencer marketing is the library card (wallet-sized or jumbo) photo. In the social media era to date, LAPL has led the way with this tactic, showcasing Hollywood and entertainment industry endorsements of the library and what it stands for (who does not get a kick out of seeing Keanu Reeves in a public library with the iconic LAPL card?). While these more

traditional expressions of celebrity endorsement continue to benefit libraries and archives, influencer marketing as a practice is much more complex than simply posting a photo on a library's social media accounts. It involves recruiting and engaging with a wide range of individuals with sizable influence and/or following among specific communities with whom a library or archive hopes to develop a stronger connection. All parties involved come to an agreement about what content will be generated, where it will be posted, and what type of engagement is sought.

A library and archive-specific definition of influencer marketing is necessary to embrace this work. Influencer marketing is the practice of collaborating with influential individuals—via their social media accounts, both within and outside a library or archive—to showcase an institution's work and to deepen connections with the communities served by the influencers. The evolution of the connections that influencer marketing cultivates can be observed through quantitative and qualitative measures based on strategic communications and marketing goals. It is not enough to simply engage influencers to interview authors or promote special initiatives like summer reading and engagement. An influencer marketing program should have specific goals across short and long-term timelines, even if the goals are as simple as increasing library engagement among one cultural community on a single social media platform.

Modeling Influencer Marketing

"La Comunidad Reads" by DC Public Library and @Lupita.Reads

DC Public Library (DCPL) has collaborated with iconic queer Mexican book influencer Lupita Aquino (@Lupita.Reads on Instagram, Threads, X, and TikTok) for more than five years through various programming collaborations, including a book club series on Latine immigration experiences presented in partnership with Washington Performing Arts, Politics and Prose, and Solid State Books in 2019. Since 2023, DCPL and Aquino have presented "La Comunidad Reads," a series of Latine author events "set to showcase and amplify Latine voices in literature, highlighting the richness and diversity of their works." In the series announcement, Aquino describes the initiative's goal as "to turn every page into a dialogue and every word into an opportunity for connection."[7] Events have featured prominent authors from across the US-based Latine writer community, including Alejandro Varela, Angie Cruz, Jaquira Díaz, Alex Espinoza, and Vanessa Angélica Villarreal. Aquino moderates the events, and she regularly promotes them on her social media accounts. She also promotes the series in her own media appearances, which provides additional exposure for the joint initiative with DCPL.

What makes this collaboration valuable for DCPL and its customers? Aquino helps DCPL curate desirable and relevant programming. She brings in an audience that will trust her recommendations about the library's direct marketing efforts, and her commitment to inclusive and accessible programming matches DCPL's. Aquino is one of the most revered book influencers in the country who focuses on uplifting Latine authors for a wide range of readers. She has been featured by *The Today Show* and NPR, and collaborates with major publishers. Aquino's social media reach, 47,000+ Instagram followers and 67,100+ TikTok followers, is massive. Her partnership with DCPL ensures that the library's programming is increasingly visible to Washington, DC, area residents interested in Latine literature, but also ensures that DCPL's inclusive literary programming is visible to library workers, book influencers, and publishing industry influencers across the country.

Elevating Library Workers

Across the country, libraries, archives, and cultural institutions are embracing the concept of influencer marketing, both by engaging "external influencers" (outside voices to champion their work) and elevating their stories through social media accounts of "internal influencers" (individual leaders and information professionals from within). National leaders like the Librarian of Congress Dr. Carla Hayden (@LibnofCongress and @LibrarianofCongress, active on X, Threads, and Instagram), and LAPL's City Librarian John Szabo (@BiblioSzabo, active on X, Threads, Instagram, Facebook, and LinkedIn), provide two notable examples of how individual library leaders develop substantial national and international social media followings that provide a distinct glimpse into the day-to-day work of their institutions. The influential voices from within the library and archives community help maintain the perception of trust in our institutions.

One of the great librarians to follow on social media today is Jamar Rahming, executive director of the Wilmington (DE) Public Library. Rahming's social media accounts—including Facebook, Instagram, and LinkedIn, reach many influential library and cultural leaders in his network. He and his team were recently named 2024 Library Journal Marketer of the Year for their "holistic, inclusive, and imaginative promotional efforts, driven by Rahming's belief that culture has the power to enlarge everyone's world."[8] The work Rahming leads is trendsetting, partly because of who he reaches and influences on social media with his informative, personal messaging about Wilmington Public Library's headliner programming. Rahming's follower count is highest on LinkedIn, reaching more than 7,000 influential professionals nationwide. He communicates in an authentic way to thousands of decision-makers and creative individuals who can learn from his best practices and adapt them to their local settings.

Many libraries and archives have social media influencers within their ranks, beyond the leadership level. Hawa Jalloh, a talented librarian at the Prince George's County Memorial Library System (PGCMLS) in Maryland, built and maintains a solid following (10,200+ as of October 6, 2024) as a book influencer using the handle @HawaReads on Instagram (known as a "bookstagrammer"), Threads, and X. Jalloh's influencer niche is elevating Black authors and stories, which is reflected in her personal content and content she contributes to her library's official platforms (which she also shares on her personal accounts). Jalloh and several colleagues from PGCMLS were featured in 2023 in a TikTok video, developed by the library's award-winning Public Relations Department for their "Rock Banned" campaign, which featured a cameo by President Barack Obama.[9] This video shared a fun, positive message about the importance of the freedom to read in an uplifting way that reached a national and international audience, including through Obama Foundation and American Library Association platforms. Influencers like Hawa choose to elevate their employer's work on their personal accounts out of a passion for their work and the communities they serve. This type of influencer engagement builds trust for the institution–in this case, PGCMLS–among the employee's personal followers.

The Playbook

How to Find Influencers and Make the Connection

Identifying prospective influencers for library and archives collaborations involves casting a wide net and maintaining a continuous awareness of social media trends reaching your communities. Communications and marketing professionals will be accustomed to researching influencers and exploring content circulating among key constituencies. However, their subject matter expertise may be specific to certain social media platforms they are most familiar with. There are two

productive ways to learn about active influencers, and this can be accomplished by anyone who has direct contact with customers or partner organizations.

The first method involves asking colleagues and community members what social media accounts they follow for certain types of content (e.g., event recommendations and local lifestyle content). If you are trying to identify influencers who reach young adults through a public library, talk to your teen services specialists, teens participating in programs, parents/guardians, and educators. If you are part of an academic library, chatting with residence life or athletics staff, or student journalists, would be a great way to learn which students in their orbit influence their classmates' choices about where to be on campus. If you work in a K-12 school library, engage with teachers and parents/guardians to learn what social media platforms have private groups and influencers that engage the broader parent community.

A second approach involves extensive online research. Once you have identified some influential accounts in your community, observe which accounts engage with them by resharing content or tagging local institutions. If you are seeking out book influencers in your area to help promote your literary events, explore the follower lists of local independent bookstores. You will be able to quickly identify some fantastic influencers who speak directly to any number of communities, from readers of romance novels to manga and graphic novels.

If you do not formally work in your library or archives' communications and marketing team, identify the institution's social media manager and talk with them about your ideas relating to trying out engaging influencers. Query if influencer marketing is a part of their current work and if there is an opportunity for you to support influencer engagement. If there is no existing program, start to develop rapport by asking what they observe on the institution's social media accounts. Staff responsible for managing social media accounts can often quickly identify the platform which profiles regularly engage with the library or archives, and which have a strong audience reach.

Expectations/Establishing the Relationship

Once you have identified influencers whose content and posts align well with your institution's values and strategic communications priorities, it is time to connect. While sending a direct message (DM) can be effective for initiating contact without a previous relationship, influencers (like most customers) develop trust and an understanding of your organizational mandate and values over time. Connect with influencers wherever you are comfortable, whether through institutional social media accounts, your personal accounts, or out and about in the community. Your request to collaborate will be received much more favorably if you have established rapport with the influencer on common ground. Libraries and archives are privileged, though, since at least book and local lifestyle influencers are often already followers and amplifiers of their local libraries and archives, given our institutions' prominent role as conveners of the community.

Organizational collaborations with influencers can take many forms. You could engage local artists who have large social media followings (artists who focus on public art projects are often strong in this area) to help promote arts and crafts programs at a public library, which could lead to the influencer presenting a program in collaboration with the library. Inviting influencers to interview authors or moderate panel discussions is always a great way to promote events to the followers of the influencers, who have more incentive to promote the event since they have a substantive role in the programmatic content. Public libraries often support families that homeschool their children, and you better believe there are homeschool parent influencers out there! Inviting them to help promote library resources, programs, and public spaces can be a win-win for everyone.

Compensation and In-Kind Benefits

After several years of working with influencers through my professional roles, I have observed—often through the testimonials of influencers who I trust and count as friends—how essential it is for institutions, whether libraries, bookstores, or publishers, to appropriately recognize the services influencers are being asked to provide in collaborations. Individuals who leverage their social media accounts to casually or professionally create content, whether book reviews or satirical reels on Instagram, maintain a network of existing and prospective library users and supporters who regularly digest their content. This provides a library or archives with an opportunity to directly reach critical communities outside of targeted paid marketing efforts.

This reach has a monetary value, like when a library invests in social media ads or utilizes Google's ad grant program for nonprofits. Influencers have every right to monetize access to their followers, and institutions must be prepared to offer compensation for influencer engagement. If there are budgetary constraints, then the institution must explore options to offer influencers in-kind support like complimentary admission to an event that has a high ticket charge (such as a fundraiser), an opportunity to interview a visiting author for the influencer's own Instagram live or podcast, or library swag that meets a substantial value threshold. Ultimately, the compensation and recognition an influencer requires will depend on the demand for their services, the size of their following, and if they depend primarily on the influencer income for subsistence.

Institutions can quickly fall into a pattern of inappropriate behavior with influencers, expecting them to provide coverage for the "exposure" or to "gain experience." While this may be appealing to emerging influencers seeking to grow their followership, imagine making this ask of a freelance musician who depends on income from their gigs to make ends meet. Influencers, whether they do the work full-time or for fun on the side, should be respected as we do independent contractors who present programs. Failing to appropriately compensate or negotiate in-kind recognition with influencers becomes highly problematic if the institution hopes influencers will help reach communities underserved by the library or archives. If you are trying to improve engagement with the Hispanic and Latin community by promoting library card sign-up month in September, asking a Hispanic or Latin influencer to help you with that for no benefit to them (beyond the public service) could turn into a public relations crisis. Start a conversation with the influencer about your idea, ask what an appropriate form of compensation in exchange for their support would be, and negotiate if necessary. Libraries and archives that collaborate with influencers can easily find any unfair attempts to take advantage of influencers' platforms for no compensation on blast to the very followers they were trying to develop a stronger relationship with.

Conclusion: Centering Influencer Marketing

Whether you are new to community engagement, entering a communications and marketing job in a different type of library, or wholly unfamiliar with influencer marketing, the examples and advice offered can help you start to consider this powerful opportunity for expanding your institution's reach through trusted internal and external voices on social media. As long as social media remains an essential avenue for libraries and archives to reach existing and prospective users where they are, influencer marketing will be an invaluable tool to center in your communications, marketing, and engagement strategies. If your organization has never engaged influencers, start small with a pilot for a single series of events or special initiative. Develop a relationship with one or two influencers with a trusted following that differs from your existing institutional social media following. Invite those influencers to recommend contacts of theirs who might be passionate about helping promote

the work of your library or archives. When you establish a workable proof of concept, take the next step to engage more or different influencers. Always set collaboration goals, analyze the results, and refine for the next round.

Just like ALA's READ posters have held a core identity for almost five decades while evolving to include current celebrities, influencer marketing will continue to grow in libraries and archives. The technical tools of the trade will continually evolve, but the formula for engaging influencers will likely remain the same. Develop relationships with voices who have existing trust among specific communities of customers. Identify meaningful ways to engage those influencers in your work, compensate and recognize those contributions, and consider how your short-term engagement goals can serve long-term engagement goals. There will be a day when the Generation Z influencers will be the more seasoned social media experts, and they will look at the ideas of new colleagues as somewhat different. That is ok. Proactively adapting how libraries and archives communicate based on users' information-seeking behaviors is the best way to cultivate and sustain meaningful long-term relationships with the communities served.

References

1. Edward M. Corrado, "Low Morale and Burnout in Libraries," *Technical Services Quarterly* 39, no. 1 (2022): 37–48, https://doi.org/10.1080/07317131.2021.2011149.
2. Anastasia Tsioulcas, "Fresh Off A Viral Library Gig, The Linda Lindas Get A Record Deal," NPR, May 24, 2021, https://www.npr.org/2021/05/24/999757630/fresh-off-a-viral-library-gig-the-linda-lindas-get-a-record-deal.
3. Peter Suciu, "History of Influencer Marketing Predates Social Media by Centuries–But is There Enough Transparency in the 21st Century?," *Forbes*, December 7, 2020, https://www.forbes.com/sites/petersuciu/2020/12/07/history-of-influencer-marketing-predates-social-media-by-centuries--but-is-there-enough-transparency-in-the-21st-century/.
4. Sylvia Chan-Olmsted and Hyehyun Julia Kim, "Influencer Marketing Dynamics: The Roles of Social Engagement, Trust, and Influence," in *The Dynamics of Influencer Marketing*, 99–122 (United Kingdom: Routledge, 2023), https://doi.org/10.4324/9781003134176-7.
5. MSNBC, ["Marcus Johnson, an Oakland University student who went viral…"], TikTok, October 3, 2024, https://www.tiktok.com/@msnbc/video/7421376616418250027.
6. Kelly Jensen, "Celebrity 'READ' Posters of the 80s and 90s," *BookRiot* (blog), December 3, 2013, https://bookriot.com/celebrity-read-posters-80s-90s/.
7. DC Public Library, "DC Public Library and Lupita Reads Unveil La Comunidad Reads," *DC Public Library*, July 13, 2023, https://www.dclibrary.org/news/dc-public-library-and-lupita-reads-unveil-la-comunidad-reads.
8. Lisa Peet, "All Rise at Wilmington Public Library | LJ Marketer of the Year Award 2024," *Library Journal*, October 1, 2024, https://www.libraryjournal.com/story/marketeroftheyear/all-rise-at-wilmington-public-library-lj-marketer-of-the-year-award-2024.
9. Prince George's County Memorial Library System, "Library's 'Rock Banned' Teams with President Obama on TikTok Video in national Campaign," Prince George's County Memorial Library System, July 18, 2023, https://ww1.pgcmls.info/13341.

Readers' Advisory
Craig Clark, col. ed.

RA Toolbox

"Best of" and Awards Lists

Craig Clark

The impetus for this column began on a Sunday morning while I was reading the *New York Times*. The Book Review section on September 1, 2024, did not present the traditional review format, but instead the headline read: "The 100 Best Books of the 21st Century." The list was originally published online in July 2024. In addition, the *New York Times* also created a survey for the public to enter their favorite books as a response to the list and published it online on July 18 as "Readers Pick Their 100 Best Books of the 21st Century" with very different results. As a readers' advisor, I love a good reading list and I became curious as to the methodology of this particular list, how the selections on both the "experts" and public choices compared with American Library Association lists and awards, as well as the utility of the recommendations for RA librarians. Effective readers' advisory requires a constant state of learning and building a knowledge base using online tools, print resources, and juried award or "best of" lists to deliver quality recommendations to or patrons.

The *New York Times Book Review* "The 100 Best Books of the 21st Century" methodology is straightforward:

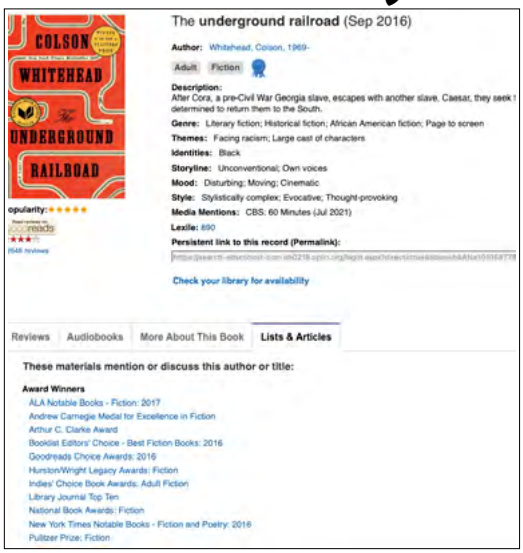
> In collaboration with the Upshot—the department at The Times focused on data and analytical journalism—the Book Review sent a survey to hundreds of novelists, nonfiction writers, academics, book editors, journalists, critics, publishers, poets, translators, booksellers, librarians and other literary luminaries, asking them to pick their 10 best books of the 21st century.
>
> We let them each define "best" in their own way. For some, this simply meant "favorite." For others, it meant books that would endure for generations.
>
> The only rules: Any book chosen had to be published in the United States, in English, on or after Jan. 1, 2000. (Yes, translations counted!)
>
> After casting their ballots, respondents were given the option to answer a series of prompts where they chose their preferred book between two randomly selected titles. We combined data from these prompts with the vote tallies to create the list of the top 100 books.[1]

One minor flaw in the methodology is allowing respondents to define "important" as how they wish. However, upon comparison with other book awards and lists, vague definitions are the norm whether there are five or 500 judges. The Pulitzer Prize for fiction FAQ page states: "There are *no set criteria* for the judging of the Prizes. The definitions of each category are the only guidelines. It is left up to the nominating juries and the Pulitzer Prize Board to determine exactly what makes a work *distinguished*."[2] The American Library Association's (ALA) Notable Book Council, on which I served several years, states its goal: "to make available to the nation's readers a list of 25 very *good*, very *readable*, and at times very *important* fiction, nonfiction, and poetry books for the adult readers.[3]

Correspondence to this column should be addressed to **Craig Clark**, e-mail: cclark125@gmail.com.

Finally, The Andrew Carnegie Medals for Excellence in Fiction and Nonfiction "recognizes the best fiction and nonfiction books for adult readers published in the US in the previous year and serve as a guide to help adults select quality reading material. They . . . reflect the expert judgment and insight of library professionals who work closely with adult readers."[4] Every list or award is subjective, but the expertise and knowledge of those who participate in their creation offer RA librarians useful tools in matching books with their readers.

Readers' Advisory takeaways from the *New York Times* List



Results of any "best of" list can be debated ad nauseam by library professionals and readers in general, but a more useful consideration for RA librarians is a list's usefulness in providing book recommendations to library patrons. The *New York Times* list offers an abundance of suggestions. First, each entry lists several readalikes after a brief description of the appeal of the novel. For instance, *The Underground Railroad* by Colson Whitehead (#7) includes *The Prophets* by Robert Jones Jr., *Washington Black* by Esi Edugyan, and *The American Daughters*, by Maurice Carlos Ruffin as possible readalikes.[5] RA librarians looking to expand their knowledge base and RA recommendations will find this a useful resource for recent literary fiction and, to a lesser extent general nonfiction as the list skewed toward fiction by a three to one ratio.[6] Secondly, the magazine shares the ten nominations from several authors including Min Jin Lee and Stephen King. These entries provide an opportunity to recommend books to a Stephen King Reader that are outside of common readalikes for the popular author. Lastly, the headers on certain pages have book recommendations based on general questions that readers might ask such as "I want a short book I can read in a day"[7] or "I'm looking for something great for my book club (extra points if we can fight over it)."[8] Effective RA librarians should always be on the lookout for unique book recommendations that can be used for book displays, book discussions and everyday RA interviews.

A Comparison of the *New York Times* Best 100 to ALA Generated Lists and Awards

As stated in the introduction of this article, I was curious how the *New York Times* list compared with awards and lists generated by the library world. I relied heavily on NoveList for compiling award winners and "best of" lists for each of the 100 titles. NoveList provides a multitude of information in each book entry. I searched the database for each book on the *New York Times* Best 100 list and referenced the "lists and articles" tab and created a spreadsheet to track awards and lists.

I included the following awards in the comparison: ALA Notable Books, Andrew Carnegie Medal for Excellence in Fiction and Nonfiction, *Booklist* Editors' Choice (combined), and *Library Journal* (Best Books and Top Ten combined). The Pulitzer Prize and National Book Award are also included in the data.

One hundred titles over the span of 24 years is a large list and there are more similarities at the top of the list. Half of the overlap with Notable Books Council (24 titles) occur within the first 34 titles

Table 1. Number of *NYT* best 100 titles listed in other awards or lists

	Notable Books Council	Carnegie Medal Winner or Finalist	*Booklist* Editors' Choice	*Library Journal* Best Books	Pulitzer Prize Winner or Finalist	National Book Award Winner or Finalist
No. of Titles	48	7*	33	45	24	19

*First awarded in 2014

of the *New York Times* list. It should also be noted that the number one title on the *New York Times* list *My Brilliant Friend* by Elena Ferrante (2012) did NOT appear on any awards or best lists. Part of the allure of her riveting Neapolitan novels is the mystery surrounding her identity. Her novels also appear three times on the list with *The Story of the Lost Child* (#80) and *Days of Abandonment* (#92). A strictly analytical take on a definition of "most important book' goes to Colson Whitehead's *The Underground Railroad* (#7). His was the only title that appeared on every list or award in table 1. The other most awarded or mentioned books on the list were *Evicted: Poverty and Profit in the American City* (#21) by Matthew Desmond, *Between the World and Me* (#36) by Ta-nehisi Coates, *The Great Believers* (#64) by Rebecca Makkai, and *The Sympathizer* (#90) by Viet Thanh Nguyen. As for the whole of the *New York Times* list, there is an interesting insight in the introduction that sums up the major themes included in the selections:

> The best of the best, Nos. 1 through 10, are linked for sure by sensitive intelligence and achieved ambition. But other connections can be made. Most are historical novels or narrative histories, as if readers, weary of the vacuity and smash-and-grab belligerence that dominate much of American political and social discourse, desired either to escape or to gaze backward, to better understand how we arrived here.[9]

The library list and awards are well-represented on the list. Of the 100 titles, only 14 were not included in any list including the Pulitzer and National Book Award.

There were a few titles that didn't make the list that surprised me as during their year of publication they were quite popular: *The Sixth Extinction: An Unnatural History* (2014) by Elizabeth Kolbert, *Just Mercy* (2014) by Bryan Stevenson, *How We Fight for Our Lives* (2019) by Saeed Jones, and *A Little Devil in America: Notes in Praise of Black Performance* (2021) by Hanif Abdurraqib. This is not meant as a criticism of the list but rather an opportunity: as an RA librarian, connections and recommendations can originate with a great list or with titles remembered but not mentioned in an award.

The *New York Times* offered its readers a chance to respond to the most important book selections with a survey to choose their own titles. "Readers Pick Their 100 Best Books of the 21st Century" was offered in the same format: readers entered their favorite ten titles, and the results were posted online on July 18, 2024. Below is a table representing the number of titles mentioned by various library sources. We omitted the Pulitzer and National Book Award from this table, and LibraryReads mentions were added to the tabulations.

While the numbers are similar between the experts and the readers' choice list, it is interesting and telling that the *New York Times* 100 Best Books list included only 40 titles of the readers' choice list. Barbara Kingsolver's Pulitzer Prize winning *Demon Copperhead* (2022) tops the readers' list although it only appeared in a Library Reads selection, and *All the Light We Cannot See* (2014) was number 2 on the list. Elena Ferrante's *My Brilliant Friend* came in at number eight. Reader participation also presented some youthful choices for the list with *The Hunger Games* (2008)

Table 2. Readers' choice best 100 titles listed in other awards or lists

	Notable Books Council	Carnegie Medal Winner or Finalist	*Booklist* Editors' Choice	*Library Journal* Best Books	Library Reads Selection	*NYT* 100 Best Books
No. of Titles	49	9*	28	35	24**	40

*Since 2014
**Since September 2013

by Suzanne Collins and *Harry Potter and the Deathly Hallows* (2007) by J. K. Rowling landing at numbers 56 and 73, respectively. The readers' choices were also more recent in publication: 38 titles were published before 2010 on the *New York Times* top 100 list as opposed to only 27 on the readers' choice list. Of the titles on the lists published 2020 or later, the *New York Times* top 100 contained only ten titles while the Readers' Choice list included 24 titles. All in all, The Readers' choice list skews a bit more popular and recent as compared to the *New York Times* 100 Best and the library lists are consistent to both lists in recognizing both critical and popular favorites.

Readers' advisory librarians provide connections and recommendations to readers on variety of topics and reading interests. No one is an expert on all genres so it is important to build a knowledge base and strategies to find the books that readers will enjoy. "Best of" lists and book awards are building blocks for superior readers' advisory service. NoveList Plus is a great resource for locating readalikes, finding inspiration for book displays and other materials, and exploring topics that are of interest to readers. If available, take the time to browse *Library Journal*, *Booklist*, and other trade journals on a regular basis. Participate in the LibraryReads website (www.libraryreads.org) and contribute your favorite titles to their monthly voting. Using all of the tools available will allow you to provide consistent service to readers who will reward you by returning for more recommendations.

References

1. Dwight Garner, "The 100 Best Books of the 21st Century as Voted on by 503 Novelists, Nonfiction Writers, Poets, Critics and Other Book Lovers," *New York Times Book Review*, September 1, 2024, p. 3.
2. "Book Submission FAQs, Guidelines and Requirements," The Pulitzer Prizes, accessed October 8, 2024, https://www.pulitzer.org/page/books-submission-faq-guidelines-and-requirements.
3. "Notable Books List," RUSA Update, accessed October 8, 2024, https://rusaupdate.org/awards/notable-books-list/.
4. "About the Andrew Carnegie Medals," American Library Association, accessed October 8, 2024, https://www.ala.org/carnegie-medals/about.
5. Garner, "The 100 Best Books of the 21st Century," 13.
6. Garner, 5.
7. Garner, 13.
8. Garner, 39.
9. Garner, 5.

Reference Services and Instruction
Rebecca Graff, col. ed.

Five Good Things: Incorporating Relational Teaching Practices in Reference Services

Five Elements that Drive Learning

Laura Sheets

In her book *Connected Teaching: Relationship, Power, and Mattering in Higher Education*, Harriet Schwartz uses the relational cultural theory from psychology as a framework for creating connections and relationships between students and instructors. Schwartz explores relationships not as an additional element to teaching and learning but "*as a site and source for* learning" itself (emphasis added).[1] In other words, relationships are where learning *actually occurs*. Schwartz posits that "connected teaching consists of and creates five elements that drive learning."[2] These elements parallel the five components (or "Five Good Things") of mutual empowerment, developed by psychologists Miller and Stiver.[3] These components that lead to strong emotional relationships between client and psychologist were the foundations of relational cultural theory (or therapy). The Five Good Things are:

- energy
- knowledge
- sense of worth
- action or movement
- desire for more connection

These five things can be applied to reference interactions easily. Using these techniques in reference services both incorporates instruction techniques and connects with patrons to reduce library anxiety and create a sense of belonging in the library.

Energy

When "energy" is mentioned, especially in terms of classroom teaching, many people might picture a zealous and inspiring instructor ala Robin Williams in the film *Dead Poets Society*. Some librarians may think, "I will never be the type of teacher that comes into the classroom with that style of teaching, who will stand on the desk or have students falling out of their seats laughing." However, Schwartz's description of "energy" in this context does not have to do with the instructor's (or reference librarian's) delivery. We all have friends, family members, or other people in our lives who

Laura A. Sheets (sheetsl@bgsu.edu) is Instruction Services Librarian at Bowling Green (OH) State University.
Correspondence concerning this column should be directed to Rebecca Graff, User Education and Outreach Librarian at Southern Methodist University, Dallas, email: regraff@mail.smu.edu.

leave us feeling energized after being in their presence. Connection or relationship with others *increases* our (or, in this case, the library user's) energy after the interaction. Every reference librarian has had an interaction with a frustrated or stressed student who was having difficulty finding sources for a research assignment. However, after they talked to a library staff member who gave them guidance about where to look, what search terms to use, and helped them find a few sources, they left the interaction feeling lighter and more positive.

Reference librarians should bring energy to the research questions and ideas of others. Yes, it might be the third time this week a library user on chat asked about finding sources on legalizing marijuana, but we can bring positivity to our library users' questions, even if we are interacting with them on chat. Using emojis and exclamation marks expresses energy that we may not feel in the moment.

Knowledge

Reference librarians love answering questions and sharing knowledge. But how many times has a library user approached the desk and said, "I have a stupid question"? Library workers (hopefully) tell them that there is no such thing as a stupid question. Does that really ring true with that person? Emphasizing that most people have asked the same question can level the playing field, making people feel more comfortable asking for help, not just in the library, but in their lives. Ask the library user to share their new knowledge with friends and colleagues to continue their positive feelings of learning something new.

When learning search strategies or research tips, many people believe they are "cheating" or gaming the system. Methods such as citation management software, reading strategies, or creating search statements are met with awe, but also a sense that they are getting away with something. It seems that people think research *should be hard.* Yes, research is tricky and murky and takes time, but it shouldn't be difficult on purpose. Emphasize that these strategies and approaches are completely appropriate and legitimate.

Schwartz notes that "short, focused interactions enhance a student's repertoire and knowledge."[4] A positive reference interaction with library staff both adds to a person's growing knowledge and solves an immediate need.

Sense of Worth

Schwartz defines intellectual mattering as "the experience of knowing that one's ideas or work has touched or influenced another."[5] Her research on mentoring graduate students demonstrates that intellectual mattering "build[s] the confidence of students who are struggling" and "can help . . . students begin to see themselves as scholar-practitioners."[6]

When working at the reference desk, ask people why they chose their research topic or question. Responses to this question can foster their critical thinking, creativity, and connection between the person and the library worker. When they feel safe and comfortable to do so, library workers can share their own experiences with the topic. Sharing our research experiences and foibles helps others understand that the research process is learned, not innate. It also helps people see themselves as potential successes, especially if they are unfamiliar with libraries or suffer from imposter syndrome.

Using "we" language instead of "you" language during reference interactions shows people that they matter. Some potential phrases to use:

- "We can find some great articles about this topic."
- "Let's see what books are available by that author."

This small change demonstrates that their question matter and that library staff are working on the question with them. Even if the question or request wasn't answered, continuing to work on the question, following up with status updates or the final question increases the person's self-esteem.

Action or Movement

In *Connected Teaching,* Schwartz describes a student-instructor meeting where the student approaches the instructor because they are confused about an assignment, feeling overwhelmed, or having issues outside of the classroom. The student feels stuck in a problem or situation that they do not know how to get out of. Regardless of the reason for the meeting or conversation, the concerns discussed are too large to be resolved in a short period of time.[7] However, if instructors (or library workers) approach these interactions with empathy and focus on what the person's next steps are in the process, they will leave the meeting feeling positive. They have the power to take *action* and move forward.

Schwartz asserts that "the power of connection to fuel movement may be one of the most important yet overlooked aspects of teaching."[8] This statement places library workers at a fundamental stage of the teaching and learning process. When people feel stuck and can't find information sources for a research project, they come to the reference desk (physical or virtual). Library staff ask them a few clarifying questions, then guide them to possible resources for their project. The person now has something to do:

- Browse through a list of search results.
- Read the abstracts of several articles found during the reference interaction.
- Use the search terms or search statement discussed during the reference interaction to search library databases and search engines.

They are moving forward with a plan of *action* because they had a conversation with an expert who took the time to listen to their problem and give them options for next steps. Giving specific actions during a reference interaction ignites their confidence and enthusiasm about the next steps for their project. Depending on the nature of the project and the interaction, examples could include:

- "Now that we have a good list of search results, save the ones you want to look at further. Do you know how to do that in this database?"
- "We've found a great list of articles for your literature review. I suggest you start by identifying common themes across the articles when you start reading them."
- "Now that we've created a search statement for you, I would save it in a document so you can copy and paste it into search engines and databases easily. I can also email it to you, if you prefer."

Remember to first *truly listen* to the person's question before suggesting any action, resource, or giving an answer. Connecting to the library user starts with being present in the moment and not interrupting or attempting to answer their question before they finish asking.

Desire for More Connection

In their book, *Healing Connections,* Miller and Striver analyze relationships and their potential for psychological growth. For a relationship to help both participants grow, it must be mutually empathetic. The Five Good Things that lead to these relationships must be in place for the parties to desire more connection with each other.[9]

Once that connection has been made, it creates positive emotions and grows confidence.[10] If a person's question was answered or their need was fulfilled, remind them to come back when they have more questions. Letting people know that there are subject librarians, archivists, tutors, or other specialists available to assist them spurs them to future library connections.

People may ask general questions to the library reference chat because it is the only place they can virtually ask questions about community resources. Even though they did not initiate the interaction with the reference desk for a research question, this connection will create a positive connection with the library. Potential phrases that can create a desire for more connection with people include:

- "Since you're researching primary sources, did you know that we have a university archive with archivists and staff that help you with finding information in that collection?"
- "We found what you needed for your Education class today but we have an Education librarian who is an expert in that area. You can make in-person and virtual research appointments with them, if you think that will help you in the future."
- "I'm glad I could help you find the information you needed about the city's recycling program today. Come back when you have more questions about research or anything else you need!"

One Good Exchange: Creating Connections in Brief Moments

Teaching librarians typically have limited time with students. The term used to describe librarians' common teaching method ("one-shot" library instruction) implies that librarians only have one chance to share their knowledge with students in the classroom. Reference interactions sometimes are described as transactions, like commodities or a means to an end. Schwartz dedicates an entire chapter of her book to the idea that true and meaningful connections are not bound to the length of time spent with a person. A single, small (but *meaningful*) moment can truly make a difference in a person's day, week, or even life.[11]

To create meaningful connections in small moments, librarians must be *present* in the moment. The questions library workers field can be repetitive, but it is the *first* time for that person. *Active listening* is key to creating connections. Are we only listening to form a response? Do we know the answer before the person even finishes speaking?

Things to remember to create connections during brief reference interactions:

- Don't rush through your instructions.
- Ask if they would like you to repeat any steps or need clarification.
- Remind them that you are there if they need additional assistance.
- Let the person ask their question fully before you begin speaking or even use nonverbal ques, such as nodding your head.
- Try to avoid using memorized or routine answers. Personalize your answer to the person you're helping.

Most important, practice empathy. Librarians only see a snippet of a person's life in real time without knowing what is going on outside of our interaction with them. Life is overwhelming and frustrating, even at the best of times. Many times, a person's frustration with a project, the research process, or technology can be lessened with *authentic* connection and empathy. However, it is important to note that not all interactions are capable of being met with *equal* empathy and respect. Veronica Arellano-Douglas applies relational cultural theory to reference librarianship in her chapter "From Interpersonal to Intersubjective: Relational Theory and Mutuality in Reference." She addresses the additional emotional labor of reference librarians, especially librarians of color. Arellano-Douglas explains that "this foundation for empathy . . . would [be] much more difficult—if not impossible—with a patron who was disinterested or condescending." She emphasizes that empathy "is not meant to position librarians as emotional doormats to hostility."[12] Schwartz emphasizes that connection between instructor and student (or library worker and library user) is not (and should not be) constant. Library users should "experience us as relationally *available* to them, *accessible* for connection" (emphasis added).[13]

Conclusion

People who connect with others increase their confidence, creativity, curiosity, and intellectual mattering. Small and practical changes to reference interactions can be made to practice relational teaching methods. Implementing Harriet Schwartz's Five Elements that Drive Learning into reference librarianship creates connections with library users.

References

1. Harriet L. Schwartz, *Connected Teaching: Relationship, Power, and Mattering in Higher Education*, First ed. (Sterling, VA: Stylus, 2019), 16.
2. Schwartz, *Connected Teaching*, 16.
3. Jean Miller Baker and Irene Pierce Silver, *The Healing Connection: How Women Form Relationships in Therapy and in Life* (Boston: Beacon Press, 1997), 30.
4. Schwartz, *Connected Teaching,* 17.
5. Harriet L. Schwartz, "Dinner at Fitzwilly's: Intellectual Mattering in Developmental Relationships" (paper presented at Sixth Annual Mentoring Conference, University of New Mexico Albuquerque, 2013), 1.
6. Schwartz, "Dinner at Fitzwilly's," 1.
7. Schwartz, *Connected Teaching,* 17–18.
8. Schwartz, *Connected Teaching,* 18.
9. Baker and Silver, *The Healing Connection*, 33–35.
10. Schwartz, *Connected Teaching*, 16.
11. Harriet L. Schwartz, "One Good Exchange: Connected Teaching When There Isn't Enough Time," in *Connected Teaching: Relationship, Power, and Mattering in Higher Education*, First ed. (Sterling, VA: Stylus, 2019), 24–38.
12. Veronica Arellano-Douglas, "From Interpersonal to Intersubjective: Relational Theory and Mutuality in Reference," In *Reference Librarianship and Justice*, edited by K. Adler, J. Beilin, and E. Tewell (Sacramento, CA: Litwin, 2017), 238.
13. Schwartz, *Connected Teaching,* 14.

From the Committees of RUSA

Outstanding Business Information Sources 2024

BRASS Business Information Sources Committee

Each year, the Business Information Sources Committee of the Business Reference and Services Section (BRASS) selects the outstanding business information sources published since May of the previous year. This year, the committee reviewed twelve entries; of these, two were designated as "Outstanding" and three as "Notable." Works are examined for the following: ease of use; reputation of the publisher, author, or editor; accuracy; appropriate bibliography; organization; comprehensiveness; value of the content; currency or timeliness; uniqueness; quality and accuracy of index or cited references; and quality and usefulness of graphics and illustrations. This year's selection of works runs a wide range of topics from: the latest in green finance, issues of natural resource depletion and overreliance, social media influencers from beginnings to current industry, mega project management, and an eye-opening work on the destruction of industries because of private equity firms.

Outstanding

The Routledge Handbook of Green Finance. Edited By Othmar M. Lehner, Theresia Harrer, Hanna Silvola, and Olaf Weber. New York: Routledge, 2023. 614 p. Hardcover $280.00 (ISBN 9781032385297). Contact publisher for e-book pricing (ISBN 9781003345497).

Despite concerted efforts on environmental, social, and governance (ESG) issues within the corporate sector over the last decade, some financial and corporate actors remain at odds with ESG. This may create the impression that commitment to ESG standards is waning. However, as highlighted by the contributors to *The Routledge Handbook of Green Finance*, climate change, with its environmental consequences, poses a significant threat to the stability of financial systems and a major concern for the global economy. Long-term financial stability demands widespread attention to ESG issues now. This handbook makes it clear that ESG efforts are not fading, but evolving and becoming more integrated into business strategies and finance ecosystems.

The editors bring together a wide variety of expert scholars, researchers, and industry figures and combine their perspectives in the most comprehensive overview of green finance to date. Although few individual readers can grasp the full breadth of perspectives and knowledge that span the chapters, they combine to create a comprehensive source that outlines the present green finance situation. The foreword and introduction lay out the current landscape and aptly note

BRASS Business Information Sources Committee contributing members: Chloe Dufour and Judy Opdahl, selections co-editors; Amy Jansen, committee chair; Allison Gallaspy, Carmen Orth-Alfie, Catherine MacGregor, Edward Kownslar, Halley Todd, Hyun Duck McKay, Kelly S. Janousek, Natalia Dolan, Peter Z. McKay, and Tim Tully.
Correspondence concerning this column should be addressed to Judy Opdahl, Business and Economics Librarian, California State University San Marcos, email: jopdahl@csusm.edu, or Chloe Dufour, Business Librarian, University of Pittsburgh University, email: chd84@pitt.edu.

that the changes necessary to address climate change will require enormous capital from global governments, NGOs, corporatations, and philanthropic sources. There is much talk, media hype, and hand wringing about climate change, but green finance and those who recognize its value may just be at the heart and center of any real global changes coming to fruition.

The handbook is divided into five parts. Part 1 displays the breadth of research emerging on green finance and the regulatory environment. The authors of these chapters speak to an array of topics such as public financial institutions (PFIs) and low carbon investing, double materiality, and internal carbon pricing. Part 2 centers on financial instruments and makes observations and compelling arguments about environmental impact measurements, carbon management systems, and green bonds. Part 3 addresses sector and country specific issues, and part 4 offers interesting critical perspectives on the topic, including a call to evaluate when and how we collect impact measurement data, noting it is not neutral or free. Part 5 looks to the future and introduces new theoretical models to better understand the complex financial relationships within green finance.

While approaches to ESG may be changing, the underlying goal of responsible business practices that positively impact the world remain the same. The *Routledge Handbook of Green Finance* is outstanding for its broad scope, currency, and ease of use. Readings are better suited to those with knowledge of or a background in finance or business, including advanced students and faculty/scholars, but are also accessible for most well-informed readers. The handbook can serve as a standard reference work for most academic libraries, large and small, and upper-level undergraduates, graduate students, academic faculty, policy makers, and other scholars and researchers wishing to orient themselves in a rapidly developing and increasingly topical field.

Reviewed by Amy Jansen, Southern Connecticut State University

Material World: The Six Raw Materials That Shape Modern Civilization. Ed Conway. New York: Alfred A. Knopf, 2023. 512 p. Hardcover. $35.00. ISBN 9780593534342. Contact the publisher for e-book pricing (ISBN 9780593534359).

Material World, by journalist Ed Conway, economics and data editor of *Sky News* and a columnist for *The Times* (London), tells the stories of six natural resources with high economic value that impact the daily lives of consumers: sand, salt, iron, copper, oil, and lithium. Each section of the book begins with the natural phenomena that created these resources and then describes the methods to create the products from these materials, including glass, silicon wafers/chips, pharmaceuticals, cleaning products, steel, aluminum, wiring, fuel and batteries.

Manufacturers must use the purest versions of these resources, which are only found in certain parts of the world. After the resources are mined and shipped, they require additional processing with chemicals and higher ranges of heat. One of the most interesting parts of the book describes the manufacturing process of silicon wafers (in the "Sand" section) and the intense competition between the United States and other countries in the wafer and chip markets.

Conway makes the background of each natural resource an engaging and fascinating read. He visited many of the locations where the resources are mined and where the products are manufactured.

While these resources have improved the lives of consumers, Conway also discusses the dangers associated with our increasing reliance on them. First, manufacturers must use a large amount of raw material to create a much smaller finished product, and this requirement further increases the rate of resource depletion. As Conway states in the book's introduction: "In 2019 . . . we mined, dug

and blasted more materials from the earth's surface than the sum total of everything we extracted from the dawn of humanity all the way through 1950." The demand for all these finite resources is still increasing. Also, the mining and extraction processes are causing environmental damage.

As consumer demand for these resources increases, both the competition to protect and desire to control access to these resources is increasing. As a result, this situation has made the supply chains more complicated and vulnerable to criminal activities and even war.

It will not be easy (or quick) to reduce our dependence on these resources. There will also be significant challenges with reversing the carbon emissions and climate change effects associated with these products. Conway believes that we should be able to find the same innovations that we used to create these products to create a more sustainable future.

Material World was selected as one of the best books of 2023 by *The Economist*. Recommended for all readers, public and academic libraries.

Reviewed by Edward Kownslar, Stephen F. Austin State University

Notable

The Influencer Industry: The Quest for Authenticity on Social Media. Emily Hund. Princeton, NJ: Princeton University Press, 2023. 218 p. Hardcover $29.95 (ISBN: 9780691231020). Individual e-book $29.95 (ISBN: 9780691234076). Contact publisher for institutional e-book pricing.

The Influencer Industry by Emily Hund traces the evolution of social media influencers from hobbyists to professionals. Hund argues that what influencers are selling, and marketers are buying, is the appearance of authenticity and tracks how external forces and consumer savvy has defined and redefined that concept over the last 10–15 years. The book also positions influencers as laborers who develop skills and discusses the precarity of these laborers in the current marketplace.

Treating influencer marketing as an industry with analysis around activities, employment conditions, power of suppliers and buyers, and regulatory concerns is new and contrasted with how the authors of popular business publications cited in the book usually discuss influencers in terms of the spend marketers and agencies pay out to them. A strength of *The Influencer Industry* is how Hund's quotes from in-depth interviews she's conducted allow insight into the individual influencer's motivations and the microeconomic forces to which they are subjected.

That said, the evidentiary support for an academic title comes primarily from these quotes. Without sharing summary statistics or sample sizes from her research results, it's hard to gauge how much of the evidence is anecdotal and what effect size it may have. For a general audience, this may not be an issue, but academic researchers might like to see more substantial evidence and reproducibility.

The later chapters of the book grapple with identifying the larger societal issues connected to influencer marketing including discussions of how bias and inequality are reproduced in the online space, the opaque way platforms and algorithms prioritize some content types over others, and the worrying shift from influencers selling products to selling ideologies. Outside of identifying these impacts, Hund also proposes some possible corrections including unionizing or otherwise professionalizing content creators' labor, more substantial legislation where needed—such as

using influencers to skirt campaign finance laws—and regulation of the platform companies (Meta, TikTok, etc.).

The Influencer Industry is suitable for public library readers and as a starting point for social science researchers looking to delve deeper into aspects of the influencer industry.

Reviewed by Allison Gallaspy, Yale Library

How Big Things Get Done: The Surprising Factors That Determine the Fate of Every Project, From Home Renovations to Space Exploration and Everything In Between. Bent Flyvbjerg and Dan Gardner. New York: Random House, 2023. 284 p. Hardcover $28.99 (ISBN: 9780593239513). Audio $20.00 (ISBN: 9780593629536). Spanish Language Paperback $22.95 (ISBN: 9788466674249). Contact the publisher for e-book pricing (ISBN: 9780593239520).

Written by the "world's leading megaproject expert" and professor in project management, this award-winning book explains why big projects seldomly get done on time nor at budget. Dan Gardner is a journalist that makes this economic text readable and understandable.

Flyvbjerg's information is based on data collected starting in mid-1990s on 258 different "megaprojects" with budgets in excess of $1 billion. The data now covers over 16,000 projects from 20-plus industries, in 136 countries. Cost overruns are large, an appendix covers by industry what megaproject risk figures look like. This book contains additional items like a reading list (most of the titles are by Bent Flyvbjerg), a 35 page bibliography, and a Readers' Guide for Book Clubs.

This book details many international megaprojects and how they failed like the Sydney Opera House or succeeded like the Guggenheim Bilbao and Pixar. The author defines what he considers a success or failure by outlining examples in the chapters. Chapters 1 and 2 cover the issues of underestimating time, which leads to being over budget and a project with fewer benefits. The data demonstrates most megaprojects have a fail rate of more than 95 percent. Chapter 3 is on the "why" of the project and planning that may not run logically. Experience has value in understanding how long the projects take according to chapter 5. The economics of megaprojects is discussed in chapter 7 from two economic points of view of how cost overruns may not be because of the creativity in the planning of the megaprojects. Chapter 9 provides strategies for megaproject completion and meeting the budget by using building blocks or "legos" to create one large thing. Finally, the chapter called "Coda: Eleven Heuristics for Better Project Leadership" nicely summarizes the leadership points proven to produce megaproject successes.

This book should appeal to public libraries, especially with the Reader's Guide. It is an easy read with data to back up the concepts that would appeal to academic libraries. Overall, this title covers an area of economics and business that is not normally studied; how megaprojects fail or succeed and why.

Reviewed by Kelly Janousek, California State University, Long Beach

Plunder: Private Equity's Plan to Pillage America. Brendan Ballou. New York: Public Affairs, 2023. 353 p. Cloth $30.00 (ISBN: 978154702103). Contact the publisher for e-book pricing (ISBN: 9781541702127).

Plunder, by Brendan Ballou, delivers a searing indictment of the private equity (PE) industry. With meticulous research and compelling storytelling, Ballou unravels the intricate web of PE's business model by exposing the inherent flaws that have allowed it to wreak havoc on companies, workers, and the US economy. Ballou is a federal prosecutor who has served as special counsel for private equity in the Justice Department's Antitrust Division.

Ballou begins by dissecting the core tenets of PE's modus operandi, explaining how PE firms acquire companies using substantial debt, often saddling them with unsustainable financial burdens. These Leveraged Buyouts (LBOs) allow PE investors to amplify their returns; however, the additional debt creates immense pressure to extract maximum value from the acquired companies. This often translates into ruthless cost-cutting measures, asset stripping, and layoffs, leaving behind hollowed-out shells of once-thriving businesses.

The author's criticism extends beyond the boardroom, delving into the human cost of PE's relentless pursuit of profit. Ballou illustrates the adverse impact on workers through widely reported stories in respected publications of workers who have seen their livelihoods shattered by PE interventions, their pensions slashed, benefits reduced, and job security evaporated.

Ballou gives concrete examples of PE's destructive impact across industry sectors. Ballou highlights the destructive impact of PE across various sectors, specifically highlighting how PE firms have ravaged the retail industry, resulting in bankruptcies and abandoned storefronts.

He exposes PE's role in declining local newspapers, undermining the media's vital role in a functioning democracy. Ballou also scrutinizes PE's incursion into healthcare, where their profit-driven practices have compromised patient care and inflated costs.

Ballou acknowledges that PE firms sometimes bring operational expertise and financial discipline to struggling companies. However, these potential benefits are often outweighed by the negative consequences of their actions.

In the final chapters, Ballou outlines a series of policy proposals to curb PE's excesses and mitigate its harmful effects. He calls for greater transparency, stricter regulations, and measures to protect workers and communities from the fallout of PE's predatory practices.

Plunder is an expose that sheds light on the dark underbelly of the private equity industry Recommended for public and academic libraries. All readers.

Reviewed by Peter Z. McKay, University of Florida

Active Learning in UX Instruction

A Four-Step Approach for Teaching Budding UX-ers

Mariana Jardim, James Zhan, and Sarah Guay

Active learning strategies are a prominent method of instruction designed to encourage learner engagement through concrete application of concepts and deep reflection to facilitate meaningful learning experiences for library professionals. Despite documented benefits, however, there is limited published literature on the implementation of active learning to user experience (UX) instruction. In this paper, we provide an example of our approach to active learning within the context of a guerrilla testing instructional workshop for library staff using a four-step lesson plan identifying tasks; writing scenarios; running tests; analyzing results). We focus attention on the importance of small group work, the role of facilitators in providing participant support, and the use of self-reflection as central aspects of the workshop design. Sample active learning strategies are highlighted throughout along with key lessons learned and recommended improvements for future workshops tailored to library contexts.

As the concept of user experience (UX) gained prominence in libraries over the past decade, the instruction of UX principles within a library context for library professionals has emerged as a critical area of focus. The existing literature on UX pedagogy is limited,[1] which may lead UX instructors to draw from a variety of instructional methods that are informed by the scholarship of teaching and learning more broadly. Active learning has been discussed in the teaching and learning literature as a method that instructors from all disciplines can employ in their teaching. It can be defined as "any instructional method that engages students in the learning process. In short, active learning requires students to do meaningful learning activities and think about what they are doing."[2] Meaningful learning activities are those that are useful, engaging, and authentic. In the library context, they enable learners such as library professionals to take what they learned and apply it to a different purpose or in another context. In summary, active learning as a method consists of implementing a range of activities and interventions that are relevant, meaningful, and that provide the opportunity for reflection. It was first proposed by Arthur Chickering and Zelda Gamson, who postulated that for learners to have a significant learning experience, "they must talk about what they are learning, write about it, relate it to past experiences, apply it to their daily lives. They must make what they learn part of themselves."[3] Since then, evidence of the method's benefits has been described by multiple scholars who have studied it. Some of these benefits include increased knowledge of content taught as well as recall,[4] the development of higher-order thinking skills,[5] greater fostering of positive feelings toward the material learned,[6] and an increased interest in learning.[7] While these studies present both general and discipline-specific findings, the benefits within the field of UX have not been approached at length in the academic literature.
In this article, we discuss how we designed our active learning-based UX workshop. We describe the design and implementation of our teaching approach, as well as the appropriateness of the method in our particular context. Our examples demonstrate how active learning can be employed to maintain library professionals' engagement and prevent participation resistance. The use of

Mariana Jardim (mariana.jardim@utoronto.ca), MA, MI, is Liaison Librarian, Management/Economics, Entrepreneurship and Co-op. **James Zhan** (james.zhan@utoronto.ca), MI, is Education Media Specialist, University of Toronto. **Sarah Guay** (sarah.guay@utoronto.ca), MLIS, is Science Liaison and User Experience Librarian, University of Toronto Scarborough.
Manuscript is based on a presentation at the January 2020 Ontario Library Association Superconference

active learning spaces and materials further support learner engagement. In addition, reference/information desk datasets can be successfully integrated into workshops to provide library staff with a "real-world" problem to solve and act as encouragement for them to explore similar UX analyses to datasets from their home institutions. We found that designing a highly structured session with some room for learner flexibility and autonomy was an effective way to keep them on task and motivated throughout. Our intention is to foster greater discussion around methods and strategies that UX instructors employ to actualize some of the active learning benefits discussed above.

Literature Overview

We conducted a comprehensive literature review to identify existing publications on the use of active learning strategies in UX instruction, particularly in relation to guerrilla usability testing. Guerrilla testing refers to "a quick and inexpensive way of testing . . . with real users. Instead of recruiting a specific targeted audience to take part in sessions, participants are approached in public places and asked to take part in research. These sessions normally last for only 10 to 15 minutes with a small incentive . . . offered."[8]

Databases pulled from several different disciplines, including education, library and information science, and computer science using the following search strategy:

> ("user experience" OR "usability test*" OR "guerrilla UX" OR "guerrilla usability" OR "guerrilla test*") AND ("active learning" OR "activity-based learning" OR "learning-by-doing" OR "learning activit*" OR "action learning" OR "hands-on learning" OR "participatory learning" OR "project method")

This yielded a total of 346 results (following de-duplication); however, a review of article titles, abstracts, and full-text found that much of the literature retrieved was irrelevant to our topic. To supplement this, we conducted a grey literature search in Google and Google Scholar, using various combinations of our keywords (e.g., active learning to teach UX, active learning UX instruction, conducting UX workshops, facilitating UX workshops, etc.). While results were still sparse, we did find that grey literature produced much more relevant results compared to academic databases. Several key findings emerged from the literature review.

When preparing to deliver UX instruction, it is important to first identify the training needs of your audience and utilize backward design principles to define your learning objectives.[9] These will be used to guide the types of active learning applied in the session and should also be made apparent to workshop participants so that they are aware of end goals for learning achievement.[10]

Several authors recommend a triad approach when teaching UX workshops, starting with an explanatory phase to introduce the activity, followed by conducting the activity, and ending with a reflective debrief upon the activity's conclusion.[11] Instructions should be simple and thorough, especially for library professionals who are new to UX,[12] and opportunity should be given to answer questions and provide clarification before moving into the active learning component. During the interactive portion, facilitators should take the back seat to allow library staff to work through the activity and should roam the room to observe and provide guidance as needed. Following the active learning component, workshop instructors can prompt participants with questions aimed to gauge key insights learned, sticking points, connections made, etc., and use these to transition into a concluding summary.

Another key consideration when designing UX workshops involves planning for the physical space and learning environment. Instructors should work to ensure a relaxed, nonjudgmental atmosphere,

and where possible, attendees should easily be able to divide into small groups during hands-on active learning components.[13]

Classrooms or learning spaces can enable movement and facilitate interactivity (e.g., through the availability of movable tables/chairs, whiteboards, hands-on technology, etc.) and encourage participants to be engaged throughout the session.[14] Based on existing gaps in academic literature and the identified need to design an active learning-based workshop, we wrote a lesson plan containing meaningful, hands-on activities, with opportunities for self-reflection and sharing amongst participants.

Four Steps to Knowing Your Users: Guerrilla Testing for Budding UXers

Workshop Overview

The workshop described herein was delivered in Toronto, Canada, at the Ontario Library Association's Superconference, in January 2020. The purpose of the workshop was to demonstrate how to gather the information needed to embark on guerrilla testing. We aimed to teach the attendees how to test users with this method and perform basic analysis of the results. We did this by engaging in active learning activities and by providing templates that can be adapted to the needs of different libraries. Below is a break-down of the session.

After briefly introducing ourselves, we outlined the workshop's learning objectives for the attendees:

- to gather the information required to embark on guerrilla usability testing
- to understand how to test users using the guerrilla method
- to perform basic analysis of testing results

We started by presenting the concept of guerrilla testing as a quick, inexpensive method of gathering user experience feedback. We highlighted for participants the reasons for using this method, such as low cost, and ease of planning and recruitment. We then outlined four crucial steps to conducting guerrilla testing: identifying tasks; writing scenarios; running tests; and analyzing results. The remainder of our workshop was organized around these steps.

Step 1: Identifying Tasks

In the identifying tasks section, we described the importance of identifying and prioritizing the right tasks for analysis. This process is further described in the "Data" section of this paper, where we discuss how we used an evidence-based approach to selecting tasks for our own guerrilla testing, employing our library's user data, which we also adapted into activity materials for this workshop.

Using the data we provided, participants were invited to take part in a task ranking activity. In groups of four, they were given five minutes to identify three to five key tasks that would be suitable candidates for guerrilla testing. During this time, we moved around the room, answered questions, and redirected participants to the activity at hand when needed.

In line with active learning principles, we led participants through a guided small-group reflection and sharing activity, where they were given prompts to reflect on their task selection and prioritization process. The discussion prompts were:

1. Which tasks did you select?
2. How did your team prioritize?
3. What other information sources could be used to identify key user tasks?

Once the small group reflection was complete, group members shared their approach with the larger group, as well as any challenges encountered with the ranking process. This concluded the first section of our workshop.

Step 2: Writing Scenarios

We then moved on to writing scenarios. We discussed the importance of having users identify with scenarios presented, and how that translates to the writing process. Writing guidelines presented include writing scenarios based on representative tasks, being jargon-free, presenting opportunities for users to solve a problem, and determining the right difficulty level for tasks. Examples from our own guerrilla testing were given to illustrate what a good scenario would look like.

Next, participants engaged in a scenario-writing activity. Using the data that was shared in the previous activity, or using their best judgement as to what their local library evidence might point to in terms of suitable tasks, each group of four broke into pairs. Both members of each pair took five minutes to write a scenario using the scenario writing guidelines. Then, taking turns, they shared their feedback on the written scenario with their partner. As before, small groups were given an opportunity to share back with the larger group on lessons learned, and successes and challenges encountered.

Step 3: Running Tests

The third part of the workshop was on running tests. We described how to run guerrilla testing, and the possibility of including a demographics question in the study agreement signature form to allow for later analysis against specific demographic characteristics. We also covered concepts such as the think-aloud protocol and technology use.

Participants applied what they learned via a preparatory guerrilla testing activity. They were prompted to think of a project in their own library or place of work that may benefit from guerrilla testing, and to articulate why testing would be beneficial. Next, they identified resources needed such as testers and technology, as well as logistical requirements. In pairs or small groups, they then devised a plan and/or a script that testers could employ to approach users with the testing request. In the interest of time, this part of the workshop included a small-group reflection on the plan and script, but impressions were not shared with the larger group.

Step 4: Analyzing Results

The last major component of the workshop was analyzing results. We dedicated this part to identifying themes, with a recommendation to use qualitative data analysis software to code speech text and quantitative data analysis software to analyze response time and number of errors. We also covered how to rank testing results based on how critical and frequent each task was, and the impact of not dealing with identified issues.

The workshop concluded with a review of the four steps covered, as described above. In addition, participants were invited to access a shared online folder containing the presentation slides, references, handouts, and a guerrilla testing interview analysis template to be adapted as required.

Materials

For the workshop, we used Apple Keynote to design a slide deck that we used as our main teaching material. To keep our participants' interest throughout the workshop, we incorporated a decent number of graphical enhancements throughout the slides, avoided putting too much text in a slide, added a couple of memes to lighten the mood, and used bullet points to organize and succinctly present information. Additionally, we designed a hands-on activity for each step we taught so our participants had an opportunity to utilize what they just learned. Activities were done using the handouts and flip chart paper provided. The workshop room had a round table setup, so participants were able to communicate with each other and discuss the activities and their thoughts. We also distributed handouts for increased accessibility to the information we were presenting on our slides.

Data

Throughout the workshop, we referenced a constant dataset upon which participants could make observations. The purpose of the dataset was to reiterate the evidence-based approach we described in the session. Furthermore, by using a real dataset we hoped to demonstrate how analyzing data can lead to solving real UX problems that are relevant to the user population being studied.

The dataset we provided was extracted from the Information and Reference Desk Statistics file, which is a compilation of all reference questions addressed to the University of Toronto Scarborough–The BRIDGE Library. This form is inherently anonymous, and responses cannot be linked back to a specific individual. Library staff wanting to implement this approach in their local context should ensure that their unit's reference statistics form is anonymous or, if there is identifying information (e.g., name, email, department, etc.), it should be stripped from the downloaded data set before it is used for UX analysis.

The questions were categorized by type, topic, and audience (student, faculty, staff, or external partner). The dataset also captured detailed information about the questions themselves, for example:

- student inquiry on how the library space and technology may be used or reserved
- student inquiry on finding scholarly sources
- help needed accessing the Bloomberg database and finding company balance sheets
- inquiry on locating events on the library website
- inquiry on joining a student group

Using the dataset, workshop participants selected tasks for guerrilla testing, completed the ranking activity, and wrote user scenarios.

While this session was carried out in the context of a one-shot conference workshop, this approach can be applied and adapted to many instructional contexts, such as undergraduate and graduate courses and employee training, to name a few.

Conclusions

While we do not have permission to share exact participant feedback obtained by conference organizers for this session, results indicated that attendees in our library conference workshop

found it highly informative and demonstrated the success of our active learning-based approach. These findings are consistent with best practices and results reported by other relevant literature.

In accordance with the findings of Kalaian, Kasim, and Nims,[15] collaborative, problem-based tasks were performed within small groups, which have been shown to be more effective than lectures in the context of technology education. The scenario writing activity further subdivided small groups into pairs to allow for a more detailed and thorough discussion of this task. Facilitators explained all activities, such as scenario writing and task-ranking, in a clear and concise manner, then roamed around the room helping groups as recommended in Gibbons.[16] To align with pedagogical best practices,[17] activities presented opportunities for participant self-reflection, culminating in a final group reflection on potential approaches to implementation in their own libraries to focus on the learning that has taken place as well as to identify knowledge gaps.

Though we found that our workshop was highly successful, there were some unanticipated limitations discovered during the session that could lead to improvements for similar instruction in the future. For instance, in the case of workshops within a conference, such as ours, it is recommended to consult with event organizers and pre-arrange for the ability to access and share survey results. This ensures that researchers-instructors can gain participant consent, and that assessment can take place accordingly. In situations where instructors have greater control over the event, setting up a research project with the appropriate ethics protocols in place also allows for greater flexibility in regard to potential research activities. Another improvement would be to enhance the visibility of activity instructions by including them on the activity handouts themselves. While we did seek to follow instructional best practices by presenting materials in multiple ways, such as conveying instructions via slides and verbally, we believe this aspect of the design could be improved. Given the limited published literature on the application of active learning principles to user experience instruction, there is ample opportunity for further research in this area. Our session only focused on guerrilla testing specifically, so future studies might explore active learning in the context of other user experience methodologies. Moreover, a study featuring a comparative analysis of the efficacy of specific strategies on learning outcomes would be beneficial to the field.

Tips for Usability Practitioners

- Prior to designing your workshop, assess the features of the space where the session will be held to determine how the space may best be utilized in support of active learning activities.
- For consistency and to reduce confusion, work from the same dataset throughout the entirety of the workshop, ensuring that the data is appropriate for the audience. For example, if your audience consists of academic librarians, include data relevant to academic libraries.
- Anticipate potential sources of participation resistance and design with those in mind to help keep workshop attendees engaged. This could include things like including collaborative activities throughout the session, having multiple facilitator check-ins during the workshop, etc.
- When designing your workshop, it is important to always have a clear focus on what the desired outcome of the workshop is—keep in mind what your target audience might want to take away from the workshop, and design activities and opportunities for feedback accordingly.

Acknowledgments

James wants to thank Professor Olivier St-Cyr for introducing James to the world of UX through his excellent UX courses and for being a passionate teacher who cares about student success. Professor St-Cyr is the reason James now advocates for better UX in libraries whenever he gets the chance.

Thank you to Abigail Warnock, library technician, The BRIDGE, for retrieving and providing feedback on the Information Desk data that was used to create workshop scenarios.

References

4. Elizabeth A. Rodwell, "A Pedagogy of Its Own: Building A UX Research Program," *Practicing Anthropology* 43, no. 2 (March 2021): 17–21, https://doi.org/10.17730/0888-4552.43.2.17.
5. Michael Prince, "Does Active Learning Work? A Review of the Research," *Journal of Engineering Education* 93, no. 3 (July 2004): 223, https://doi.org/10.1002/j.2168-9830.2004.tb00809.x.
6. Arthur W. Chickering and Zelda F. Gamson, "Seven Principles for Good Practice in Undergraduate Education," *AAHE Bulletin* (March 1987): 4.
7. Isabelle D. Cherney, "The Effects of Active Learning on Students' Memories for Course Content," *Active Learning in Higher Education* 9, no. 2 (July 1, 2008): 152–71, https://doi.org/10.1177/1469787408090841.
8. David Gosser and Mark Cracolice, *Peer-Led Team Learning: General Chemistry*, 2nd ed. (London: Pearson, 2005).
9. Leonard Springer, Mary Elizabeth Stanne, and Samuel S. Donovan, "Effects of Small-Group Learning on Undergraduates in Science, Mathematics, Engineering, and Technology: A Meta-Analysis," *Review of Educational Research* 69, no. 1 (Spring 1999): 21–51, https://doi.org/10.3102/00346543069001021.
10. Monica C. Diochon and Ann Frances Cameron, "Technology-Based Interactive Learning: Designing an International Student Research Project," *Active Learning in Higher Education* 2, no. 2 (December 1, 2001): 114–27, https://doi.org/10.1177/1469787401002002003.
11. "What is Guerrilla Usability Testing? (Short Answer)," Experience UX, https://www.experienceux.co.uk/faqs/guerrilla-usability-testing/.
12. H. Frank Cervone, "Usability Training: An Overlooked Component in an On-Going Program of Web Assessment and Development," *OCLC Systems & Services* 21, no. 3 (September 2005): 244–51, https://doi.org/10.1108/10650750510612434.
13. Anders Toxboe, "How to Facilitate and Plan a UX Workshop," Last modified January 11, 2016, http://ui-patterns.com/blog/how-to-facilitate-and-plan-a-ux-workshop.
14. Sarah Gibbons, "A Model for Conducting UX Workshops and Exercises." Nielsen Norman Group, July 22, 2018, https://www.nngroup.com/articles/ux-workshop-exercises/; Toxboe, "How to Facilitate and Plan a UX Workshop."
15. Cat Lewis, "5 Things I Learned Teaching UX Design to Non-Designers," Medium, July 23, 2019, https://medium.com/swlh/5-things-i-learned-teaching-ux-design-to-non-designers-6c7f5d393530.
16. Sema A. Kalaian, Rafa M. Kasim, and Julia K. Nims, "Effectiveness of Small-Group Learning Pedagogies in Engineering and Technology Education: A Meta-Analysis," *Journal of Technology Education* 29, no. 2 (Spring 2018): 20–35, https://doi.org/10.21061/jte.v29i2.a.2.
17. Anna Aksenovich, "Designing Active Learning," last modified February 25, 2020, https://rethink.utoronto.ca/designing-active-learning/; Carol Rolheiser et al., eds., "The Scholarship of Leading: Mini-cases of Educational Leadership in Action," Centre for Teaching Support & Innovation, University of Toronto, 2019, http://aautn.org/wp/wp-content/uploads/2019/11/Scholarship-of-Leading-Mini-Cases_Revised-Nov.-1.pdf.
18. Kalaian, Kasim, and Nims, "Effectiveness of Small-Group Learning Pedagogies," 20–35.
19. Gibbons, "A Model for Conducting UX Workshops and Exercises."
20. Chickering and Gamson, "Seven Principles for Good Practice in Undergraduate Education," 3–7; Gibbons, "A Model for Conducting UX Workshops and Exercises."

Politeness in Proactive Library Chat Reference

Megan Vladoiu

Libraries have increasingly turned to a "proactive" model of chat reference as opposed to a traditional "reactive" static model. It is well documented that proactive chat leads to an increase in usage, and prior research suggests question complexity increases with proactive chat as well. At this time, no study has investigated politeness in proactive library chat reference. By better understanding how politeness functions in chat reference, librarians will be able to adapt to a changing reference environment.

Since the start of the COVID-19 pandemic, libraries have seen an increase in the use of virtual reference services, particularly chat reference.[1] Traditionally, libraries have utilized a "reactive" static chat model in which "a chat box is embedded on a library website, and a user must take the initiative to navigate to it and ask a question."[2] In recent years, a different model has gained popularity: proactive chat. A proactive chat box automatically appears after a set amount of time, asking if the user needs help. If the user selects "chat now," they are prompted to ask a question, which is then sent to reference staff. From the staff side, there is no visual difference between static and proactive chat besides the name of the widget; all questions go to the same queue without mediation. It is imperative to note that while some libraries may make use of an automatic chat *bot*, proactive chat is not in and of itself an automated or artificial intelligence (AI) feature.
In August 2023, the Herman B. Wells Library at Indiana University implemented a proactive chat widget on their library website in addition to the preexisting static chat service.[3] Since the introduction of the proactive chat, reference staff have anecdotally reported noticing differences in chats compared to previous years. The prevailing sentiment among staff was that it seemed as if patrons didn't realize there was a person on the other end of the chat, as evidenced by the use of keywords or short phrases instead of full questions in the initial message, increased interactions where the patron never responded after sending an initial message, and a lack of common markers of politeness.

After experiencing this phenomenon and hearing similar stories from co-workers, the author decided to investigate the matter further. There is currently a gap within existing literature; at this time there has been no investigation into politeness in proactive library chat reference. This study asks the following questions:

- What differences can be found in reference interactions using proactive chat versus static chat?
- To what extent does politeness differ between proactive and static chat reference?

Literature Review

Proactive Chat Reference

Despite the "annoyingness" of proactive chat, it is well documented that the implementation of proactive chat leads to an increase in usage.[4] Several studies have attempted to explain this

Megan Vladoiu, Indiana University, Bloomington.

increase, with differing results. One study looked to determine whether proactivity itself drove use and, using unplanned outages in a proactive chat service, found that usage dropped when the proactive service was unavailable.[5] A different study however found that, while their chat usage doubled after the introduction of proactive chat, there were still four times as many chats received through their static chat than their proactive chat, leading them to suggest that "proactive chat . . . supplements, but does not replace, embedded chat."[6] Users themselves indicate that they would be more likely to use a proactive chat, with Imler et al. finding that while "only 16 per cent of study participants had used the 'Ask a Librarian' reference service . . . 83 per cent indicated that they would be more likely to use the Ask service if the widget appeared on the screen."[7]

Question type and complexity has also been studied multiple times. Complexity, typically determined through the use of the READ (Reference Effort Assessment Data) Scale as well as classifying questions by type (e.g., reference vs. directional), has repeatedly been found to increase with proactive chat compared to static chat.[8]

Politeness

One of the most prolific theories of politeness arises from sociolinguistics. In 1975, Grice introduced four guidelines, or maxims, for efficient communication. For the most efficient communication, Grice suggested that people be truthful (Maxim of Quality), clear (Maxim of Manner), concise (Maxim of Quantity), and relevant (Maxim of Relevance).[9] However, Brown and Levinson argued that communication is a face-threatening act that requires people to be polite in order to maintain face.[10] Face, they argued, is "the public self-image that every member [of a society] wants to claim."[11] Given this requirement, people often communicate in manners that break Grice's Maxims for Efficient Communication to be polite.

Brown and Levinson divided their politeness strategies into two categories: positive and negative. Positive politeness "is oriented toward the positive face of [the Hearer], the positive self-image that he claims for himself," while negative politeness "is oriented mainly toward partially satisfying (redressing) [the Hearer's] negative face."[12] Positive politeness is further broken down into 15 output strategies, which are divided into three higher-order strategies: claim common ground, convey cooperation, and fulfill the Hearer's want. Negative politeness includes ten output strategies divided into five higher-order strategies: be direct, don't assume, don't coerce, communicate desire to not impinge, and redress wants to the Hearer.[13]

Politeness in Chat Reference

There has been limited research into politeness in library chat reference. Carlo and Yoo compared language use, particularly politeness strategies, in face-to-face and computer-mediated (chat) reference transactions. They found that both librarians and patrons used negative politeness strategies significantly more online than face-to-face, and librarians used significantly fewer positive politeness strategies online.[14] They also found that politeness markers such as "please" and "thank you" were used significantly more by both parties online.

Westbrook studied the use of formality markers in library chat reference. She examined both syntactic markers of formality such as contractions and slang, as well as content markers such as apologies, self-disclosure, and expressions of need. She found that, since users initiated the conversation, they set the initial level of formality. Furthermore, users tended to have the highest

level of formality in the opening question.[15] Users were less formal than librarians, and librarians tended to follow the level of formality set by the user.

Methods

This study employs an experimental research design to answer the research questions. It compares two data sets; one set is from before the introduction of a new feature (a proactive chat widget), and the other is from after. The sets are designed to be as similar as possible besides the new proactive widget. This study design is common in research into library chat reference and has been used to examine effects of proactive chat widgets.[16]

Data Collection

Data was collected in October 2023 from Indiana University's Scholars' Commons Reference Desk online reference system (LibAnswers). LibAnswers automatically saves transcripts from chats along with details such as the time of the interaction, date, initiating webpage, widget, wait time, chatting duration, and message count. The author collected all transactions that took place Monday through Friday, September 12, 2022, through September 25, 2022, and September 11, 2023, through September 24, 2023. A purposeful sample was selected to be representative of typical reference transactions; by including the fourth and fifth weeks of the fall semester, the start of the semester, midterms, and finals are avoided. Any transactions that the author had been involved with were excluded. An additional two transactions between librarians were also excluded. A total of 73 transactions from 2022 and 170 from 2023 were analyzed. In 2022, there were 428 messages from librarians and 350 messages from patrons (including the initial question); in 2023, there were 937 messages from librarians and 761 messages from patrons (including the initial question). Figure 1 provides an example of one transaction that consists of four messages from the patron (the original message plus three more) and three messages from the librarian. After the initial question, each new message is indicated by a bullet point and the time.

Initial Question
To cancel a reserved space booking at SPEA, is there a cost?

- *15:44:41* **Librarian:** Hello, I do not believe so. Let me call them to make 100% sure.
- *15:44:56* **:** okay
- *15:45:37* **Librarian:** There is no cost.
- *15:45:53* **:** thank you!
- *15:45:59* **:** have a good day!
- *15:46:03* **Librarian:** You as well!

Figure 1 . Transaction 22-05.

Data Analysis

The data was analyzed using thematic content analysis. Transactions were imported into NVivo manually to remove identifying information. Transcripts were coded at the message level and the transaction level. The first round of coding was performed using a codebook informed by Brown and Levinson at the message level while the second round focused specifically on four markers of politeness at the transaction level (table 1). In the transaction level of coding, transactions were marked on a yes/no basis for inclusion of the markers. To compare the groups separately, all coded

Table 1. Codebook.

Code	Coding Level	Features	Example
Conventions	Message	Conventional markers of politeness Greeting Closing	"Hello" "Please" "Have a good day!"
Apologize	Message	Apologize	"Sorry!"
Common ground	Message	Compliment/show interest Use first name /nicknames Use emojis Raise or assume common ground/ common values, Joke	"I have a problem with that link too!" :)
Cooperation	Message	Suggest cooperation between both sides	"Let's take a look!"
Give	Message	Give something desired (sympathy, understanding, assistance)	"Let me see what I can find for you…"
Indirect	Message	Be conventionally indirect Create distance through past tense Pessimistic Hedging	"I wanted to know if I could check out a book."
Direct question/ start	Message	Directly ask question or state problem	"Can I check out a book?"
Greeting	Transaction	Extension of a greeting	"Hello!"
Gratitude	Transaction	Offers gratitude or responds to an offer of gratitude	"Thank you" "You're welcome"
Closing	Transaction	Explicit acknowledgement of the end of the interaction	"Have a good day!" / "You too!" "Is there anything else I can help with?" / "That's it!"
Please	Transaction	Includes a "please" in a request	"One moment please"

information was marked as either patron or librarian. Coding on the transaction level examined each exchange as a whole—for instance, consider figure 2.

Figure 2 shows one transaction containing eight messages (initial question plus seven further messages) from the patron and ten messages from the librarian. The patron thanks the librarian in messages 10:45:49, 10:47:47, 10:50:27, and 10:51:23; message level coding would code each of these for "conventions," while transaction level coding would only code for "gratitude" once.

Results

RQ 1: Differences Between Proactive and Static Chat

The number of chat transactions fitting the sample criteria increased from 73 in 2022 to 170 in 2023. In 2023, proactive chat largely overtook static chat as the predominant method of contact, however static chat continued to be used (figure 3).[17]

Initial Question
I wanted to know if I could check out a copy of a textbook?

- *10:44:22* **Librarian:** Hello, you possibly can! Can I please have the title and I will see the library has a loanable copy for you?
- *10:44:34* **:** Yes of course! algebra for college students (7th, seventh edition) - by gustafson and frisk
- *10:44:38* **:** That's the name
- *10:45:38* **Librarian:** Okay, I think there might be a copy on reserve at the Sciences Library (which means it can only be used in the Sciences Library). But I'll take a look now. One moment please.
- *10:45:49* **:** thank you!!
- *10:47:22* **Librarian:** Okay it looks like we only had one copy and it is currently checked out.
- *10:47:37* **Librarian:** I'll check to see if it is available through ILL
- *10:47:47* **:** Thank you!
- *10:49:51* **Librarian:** It looks like there are two requestable copies in UBorrow.
- *10:50:10* **Librarian:** If you go to that link, you should be able to request a copy through your library account
- *10:50:27* **:** Thank you! If I don't have a library account I should create it right
- *10:51:09* **Librarian:** If you are an IU student and you have a Crimson card, you should already have a library account. It's not something you have to create yourself.
- *10:51:23* **:** oh okay okay! I didn't know that thank you
- *10:51:30* **Librarian:** No worries at all!
- *10:51:48* **Librarian:** And of course! Please feel free to message back if you have more questions.
- *10:52:47* **:** I just entered the link and it said " library symbol is missing please contact your ILL staff"
- *10:54:21* **Librarian:** Try going to this linkand click on UBorrow from there. Once you get to UBorrow, do a search for the textbook and you should be able to find the requestable copies.

Figure 2. Transaction 22-01.

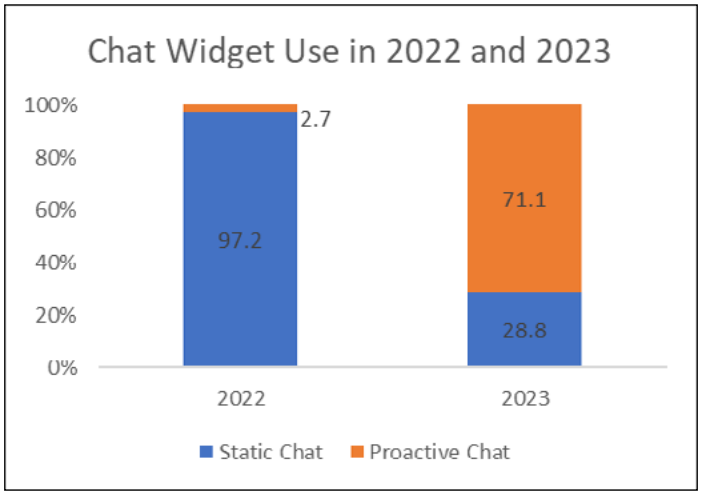


Figure 3. Percentage of chats received through static and proactive widgets.

Between 2022 and 2023, there was an increase in transactions where one side was nonresponsive (table 2). On the patron side, this refers to transactions in which the patron did not respond after sending their initial message, while on the librarian side it refers to transactions in which the librarian opens the chat but never responds. In 2022, there were eight transactions with nonresponsive patrons (10.8% of all transactions) and zero transactions with nonresponsive librarians; this increased to 27 transactions with nonresponsive patrons (15.9% of all transactions) and two transactions with nonresponsive librarians (1.2% of all transactions) in 2023.

Table 2. Transactions containing zero messages from either the patron or the librarian (excluding the initial message)

	2022	2023
Nonresponsive patron	8	27
Nonresponsive librarian	0	2

The mean number of messages per transaction (excluding the initial question) decreased from 2022 to 2023, on the part of both the librarian and the patron; given the increase in messages in which at least one side was non-responsive, the means were calculated including all transactions as well as excluding non-responsive transaction. However, the mean number of messages decreased in both modes. The mean number of messages per transaction is shown in table 3; this table shows the total number of messages per transaction and the mean number of messages per transaction. To account for the increased number of nonresponsive transactions, the total and mean were calculated for all transactions (including nonresponsive) and for transactions excluding the nonresponsive ones. When the nonresponsive transactions are excluded, there are still slight decreases in the mean number of messages. In 2022, there were an average of 10.6 messages per transaction, of which 4.3 were from patrons and 6.3 were from librarians. In 2023 this decreased to an average of 10.3 messages per transaction, 4.1 of which were from patrons and 6.1 from librarians.

Despite the mean number of messages decreasing, there was an increase in longer transactions. This is visualized in figure 4, which shows that the percentage of transactions with more than 21 messages increased from 5.5% in 2022 to 7.1% in 2023.

Table 3. Number (total and mean) of messages, excluding the initial message, in all transactions and excluding transactions in which one side was non-responsive.

Messages	Total all transactions	Mean all transactions	Total excl. nonresponsive	Mean excl. nonresponsive
All 2022	705	9.7	689	10.6
Patron 2022	277	3.8	277	4.3
Librarian 2022	428	5.9	412	6.3
All 2023	1,521	9.0	1,465	10.3
Patron 2023	588	3.5	588	4.1
Librarian 2023	933	5.5	878	6.1

The number of words in the initial message also decreased in 2023. In 2022, the mean number of words in the initial message was 29 and the median number was 21; in 2023 the mean was 21.5 and the median was 17. Additionally, the percentage of initial messages containing a single word doubled from 4.1% in 2022 to 8.8% in 2023.

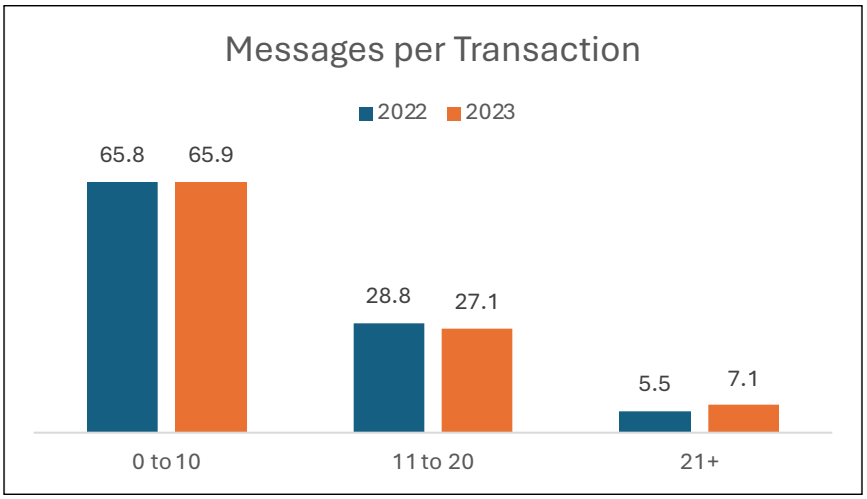


Figure 4. Chart showing the number of messages per transaction (excluding initial question), expressed as percentage of total.

The decreased number of words in the initial message parallels the change in initial message type. Greetings and words/phrases both increased, as did requests/statements, while questions decreased (table 4). The decrease in initial messages containing a question was statistically significant. Figures 5 through 8 provide examples of each type of initial message.

Table 4. Initial message type, expressed as percent of total.

Initial Message	2022	2023	Z-score
Greeting	2.7%	8.2%	-1.58
Question	67.1%	54.1%	1.88*
Request/statement	27.4%	34.1%	-0.94
Word/phrase	2.7%	4.1%	-0.52

Sig. (<.05; **<.01)*

Initial Question
Hi, I have created a WSJ account through IU which I used a ton last year. I just logged on and it wont let me view articles. It says im signed in, but it says I am not a subscriber and do not get unlimited articles.

- *10:00:55* **System:** *You are now chatting with Reference Desk Department.*
- *10:01:23* **Librarian:** Thank you for reaching out. Let me take a look into this.
- *10:02:49* **Librarian:** In order to retain access to WSJ, you will need to validate your account every 90 days.
- *10:02:58* **Librarian:** https://libraries.indiana.edu/wall-street-journal-online
- *10:03:14* **Librarian:** This link contains more useful information on IU access to WSJ

Figure 5. Transaction 23-02, an example of Request/Statement.

Initial Question
what type of source is an IGO?

- *11:09:11* **System:** *You are now chatting with Reference Desk Department.*
- *11:09:46* **Librarian:** Could you please give me more information on what you're referring to?

Figure 6. Transaction 23-06, an example of Question.

Initial Question
Hi

- *15:05:14* **System:** *You are now chatting with Reference Desk Department.*
- *15:05:19* **Librarian:** Hello.
- *15:05:33* **Guest30888738:** is there a hard copy of this book at the libarry https://vaclavsmil.com/2023/08/28/materials-and-dematerialization/
- *15:05:46* **Guest30888738:** I see e books.. but not hard copies
- *15:06:01* **Librarian:** One moment and I'll double-check...
- *15:06:36* **Guest30888738:** Thank you!
- *15:09:19* **Librarian:** You're correct; we have only e-book access. If you'd like a print copy, you could submit an interlibrary loan request: https://libraries.indiana.edu/interlibrary-loan (You could note in your request that you specifically want a print copy.)
- *15:09:47* **Guest30888738:** ok thank you!
- *15:09:53* **Librarian:** You're welcome!

Figure 7. Transaction 23-29, an example of Greeting.

Initial Question
19th century European art

- *15:14:40* **System:** *You are now chatting with Reference Desk Department.*
- *15:14:55* **Librarian:** Hello! Are you just trying to search for this?
- *15:15:08* **Guest79054642:** yeah, just books on the topic or relating to
- *15:15:19* **Guest79054642:** hopefully a collection on floor 9 or 10
- *15:16:09* **Librarian:** https://iucat.iu.edu/catalog/1889932
- *15:16:26* **Guest79054642:** Thank you!
- *15:16:26* **Librarian:** https://iucat.iu.edu/catalog/2768907
- *15:16:35* **Librarian:** Happy to help!
- *15:16:59* **Guest79054642:** Have a nice day!
- *15:17:00* **System:** *Patron ended chat.*

Figure 8. Transaction 23-50, an example of Word/Phrase.

Interestingly, there was an increase in the number and range of ratings left. When a patron ends a chat, they are given the opportunity to leave feedback. This includes the selection of a rating (great-4/4, good-3/4, so-so-2/4, or bad-1/4), a place to leave comments, and options to be contacted for follow-up or email themselves a copy of the chat transcript. The rating option is not highly utilized by patrons; in 2022, only 13.7% of chats received a rating. This increased to 21.1% in 2023.

Furthermore, while 100% of the ratings received in 2022 were either "great" or "good," in 2023 only 91.6% were rated "great" or "good" while 2.8% were rated "bad" and 5.6% were rated "so-so."

RQ 2: Extent of Differences in Politeness Between Proactive and Static Chat

Politeness was measured on two levels: transaction and message. To account for the difference in data set sizes, results are reported as frequencies.

Politeness at the Message Level

There were five relevant codes for patron politeness and seven relevant codes for librarian politeness. In most cases, there were only small differences between 2022 and 2023 (table 5). On the patron side, there was a noticeable increase in the use of common ground strategies and slight increases in the incidence of accidental or spam messages, apologies, and directness. There was also a noticeable decrease in the use of indirect language and a slight decrease in the use of conventions. None of the differences in patron politeness were statistically significant. On the librarian side, there was a slight increase in the use of conventions and a noticeable increase in giving. There were noticeable decreases in apologies, use of common ground strategies, cooperation, and use of indirect language and a slight decrease in directness; these differences were all statistically significant.

Table 5. Results of coding on the message level, expressed as percentage of total messages (including initial patron question).

	2022	2023	Z-scores
Patron			
Apologize	1.14	1.58	-0.57
Common ground	1.14	4.20	-1.11
Conventions	40.86	39.82	0.28
Direct	16.29	16.69	-0.19
Indirect	12.29	10.78	0.72
Librarian			
Apologize	4.91	1.28	2.54*
Common ground	7.94	5.02	-0.03
Conventions	31.07	31.38	-6.03*
Cooperation	2.34	0.43	2.24*
Direct	17.52	17.08	-3.62*
Give	28.27	32.87	-7.68*
Indirect	18.93	11.10	0.50

Sig. (<.05; **<.01)*

Politeness at the Message Level

For the transaction level, there were four factors looked at for both the patron and librarian: greeting, gratitude, closing, and please (see table 6). For patrons, the inclusion of a greeting increased in 2023, however the inclusion of gratitude, closings, and use of please all decreased; none of these changes were statistically significant. For librarians, the inclusion of greetings,

gratitude, and closing all decreased, but the use of please increased; changes in greetings and gratitude were statistically significant.

Table 6. Results of coding on the transaction level, expressed as percentage of total transactions.

	2022	2023	*Z*-scores
Patron			
Greeting	46.58	49.41	-0.41
Gratitude	79.45	68.24	1.78
Closing	31.51	20.0	1.94
Please	10.96	8.24	0.68
Librarian			
Greeting	87.67	65.29	3.56*
Gratitude	60.27	38.82	3.08*
Closing	49.32	40.59	1.26
Please	20.55	30.0	-1.52

Sig. (<.05; **<.01)*

Discussion

There are clear differences that can be observed between proactive and static chat, both overall and in terms of politeness. Based on prior literature, it would be expected that the volume of chats would have increased in 2023 with the introduction of proactive chat. It could also be expected that chat reference in general may contain more negative politeness strategies (e.g., be conventionally indirect, apologize) and fewer positive politeness strategies (e.g., common ground, give) and a higher number of "please" and "thank you"[17] than in person reference; however, there is no current research that would suggest there would be differences in politeness between static and proactive chat. Thus, the expectation would be for these strategies to remain stable across the two years. Some differences between 2022 and 2023 reflect the expected changes seen with proactive chat, however there are others that are less expected based on prior literature. It is possible that the overall differences influenced the levels of politeness.

Differences Between Proactive and Static Chat

As has been observed before, there was a massive increase in the number of chats received in 2023; the number of chats increased by 133%, with the majority of the chats coming from the proactive widget. While previous studies have found proactive chats to be more complex than static chats, it is undetermined whether that is true here. However, there are some indications that proactive chats were not more complex than static chats based on the number of messages. It would be expected that a more complex reference question would lead to a higher number of messages than a simple question. While there was a small increase in the percentage of transactions with more than 20 messages, the mean number of messages per transaction decreased. This could partially be explained by the increase in questions in which one side was nonresponsive, however the decrease in mean messages was still present when nonresponsive transactions were excluded. This potentially indicates that there was not a change in complexity. However, this does confirm anecdotal evidence that there was an increase in the number of chats in which the patron never responded after their initial question. Interestingly, it is possible that these

patrons are still receiving what they need. Of the 26 chats in which patrons didn't respond past their initial question, 11.5% were given a 4/4 "great" rating; 10% of all 4/4 ratings were given to chats in which the patron didn't send any additional messages.

There were also noticeable changes in the initial message. There were large increases in the percentage of greetings, request/statements, and word/phrases, which caused a corresponding decrease in the percentage of questions. This also confirms anecdotal evidence of the increase in single word or phrase initial questions. This is a possible indication that patrons are confused by what proactive chat is, leading them to test the waters with a greeting or to use it like a search bar and send a word or phrase.

Finally, there was an increase in the number and range of ratings. The increase in negative ratings could possibly be caused by the "annoyingness" of proactive chat; while patrons are more likely to use it, they may also be more likely to leave a bad rating if they aren't happy. In one notable transaction, a patron thanked the librarian and said they were helpful, and then left a 2/4 "so-so" rating. However, this is still a minority of the ratings left. More than 90% of the ratings were positive. It is possible that patrons are more likely to leave a positive rating if they feel like they did not impose on the librarian, but were instead invited to ask their question.

Extent of Differences in Politeness Between Proactive and Static Chat

Differences on the message level are smaller, perhaps since chats with more messages could contain higher use of politeness strategies, which could obscure overall trends. The slight increase in patron's accidental or spam messages could potentially be explained by the intrusiveness of the proactive widget. Both directness and indirectness are (sometimes conflicting) politeness strategies. According to Brown and Levinson, when people are asking for something, they are conflicted between giving on-record delivery (directness) and giving redress to the hearer's negative face (indirectness.)[19] In other words, politeness compels people to be indirect so as to minimize the imposition of their request, and leave room for the other person's face if they are unable to meet the request. On the patron side, it's possible the decrease in indirectness may be influenced by the intrusiveness and visibility of proactive chat; they may feel less need to leave room for the other side to not meet the request because they feel they've been invited to ask a question, rather than seeking out help. On the librarian side, the decrease in directness and indirectness could be related to the increase in giving; for the librarian, the use of directness and indirectness is often seen in the act of the reference interview. If patrons are being less indirect, librarians may be increasingly responding immediately with what the patron needs, as opposed to performing a longer reference interview.

The greater differences observed between proactive and static chat are found at the transaction level. Patrons increased their inclusion of greetings, but decreased gratitude, closing, and use of please, while librarians increased their use of please, but decreased greetings, closings, and gratitude.

Most of the change on the librarian side could likely be explained by changes on the patron side; gratitude is seen most often from librarians as a response to "thank you." If patrons don't express gratitude, there are fewer opportunities for the librarian to respond in kind. Similarly, while both the patron and librarian can (and do) initiate closings, chats can be ended before librarians think they are over, thus preventing the use of a closing. The increase in chats with zero patron messages could support this. It is more difficult to explain the decrease in greetings on the librarian side, considering the increase in patron greetings. It is possible that the increase in shorter initial questions, librarians

are more likely to open immediately with a clarifying question. Alternatively, it is possible that if patrons are more direct in their initial question, librarians are more likely to simply send the patron what they ask for without engaging in polite pleasantries. Finally, if librarians perceive that patrons are feeling frustrated or being less polite (as anecdotal evidence suggests), it is possible that they may increase their own use of the word "please," in an attempt to raise the overall politeness of the interaction.

The increase in patrons including a greeting could be explained in part by the increase in greetings as the initial question. If patrons are potentially unsure of the function of the proactive chat, they may choose to send a greeting instead of a full question, for instance, in figure 7. The decrease in the other three areas, particularly gratitude and please, could be interpreted as a lower level of politeness. It is possible that the intrusiveness and "annoyingness" of proactive chat makes patrons less likely to engage in polite pleasantries. Similarly, they may be less inclined to say please or thank you if they feel they are being offered help as opposed to seeking it out; after all, these are inclusions that are added to protect face and soften imposition. It's possible that proactive chat lessens the feeling of imposition, and thus reduces the need to redress or protect face. It is also possible that patrons believe proactive chat is instead an AI chatbot, thus reducing their need to engage politely. An example of this can be seen in figure 5. Interactions such as this can be frustrating for practitioners, as we can't be sure if we actually helped the patron.

These results have strong implications for librarians and other reference workers. Librarians at institutions that opt to use proactive chat should be aware that there will likely be an increase in the volume of chats, however they should also be aware that there may also be an increase in patrons who don't fully understand the service or may believe the chat is a search bar. An unfortunate result of this is a limited potential for an in-depth reference interview. For instance, looking back at figure 8, there was the missed opportunity for a reference interview. At the same time, however, the result was a satisfied patron—this chat received a 4/4 rating. Compare this to figure 6, for example, where the patron never responded to a clarifying question. Thus, librarians face a dilemma in their practice. Given a medium that lends itself to quick questions and seemingly a desire for quick answers, how many clarifying questions should we ask before offering a resource?

Perhaps the most vital implication for our practice is the need to change our mindsets. I have seen colleagues be understandably frustrated when they feel as if they're being treated like a chatbot. The most important thing to take away might be renewed patience and understanding that our patrons are being trained by the majority of customer service chats to interact with bots before they reach a human. We may lose some patrons when we offer our human assistance, and we need to accept that and know we're all doing our best navigating new technologies.

Limitations and Future Directions

An obvious limitation of this study is the relatively small sample size that only represents two weeks from each period; it's possible the sample does not adequately represent the entire semester's reference transactions. Additionally, the two periods were used as proxies for static and proactive chat, since the 2023 set included both types, though the majority of chats were proactive. It's possible that comparing static and proactive chats from 2023 would produce different results than comparing 2022 and 2023 chats.

There are many potential avenues for future research. One important future direction would be to interview patrons and librarians about their perceptions of proactive chat. While transcript data can

demonstrate a difference between proactive and static chat, only the participants themselves can confirm the reasons for differences in their behavior.

Conclusion

This study asked whether there are observable differences between static and proactive chat widgets in an academic library, and to what extent politeness differed. Analysis showed that there are demonstrable differences, including with regards to politeness. Differences are difficult to observe on the message level, however they are apparent on the transaction level. These findings have significant implications for librarians and library services. An increase in use and positive ratings suggests that patrons are using the service and are satisfied with the service, however the decrease in politeness and lower levels of interactions could be damaging to librarian morale. It is undeniable that proactive chat widgets have become a common part of library websites, however it will be up to libraries to decide how they might humanize these services to keep all parties satisfied.

References and Notes

1. Ruth Sara Connell, Lisa C. Wallis, and David Comeaux, "The Impact of COVID-19 on the Use of Academic Library Resources," *Information Technology and Libraries (Online)* 40, no. 2 (June 2021): 1–20, https://doi.org/10.6017/ital.v40i2.12629; Maureen Garvey, "Virtual Reference amid COVID-19 Campus Closure: A Case Study and Assessment," *Reference Services Review* 49, no. 2 (2021): 132–50, https://doi.org/10.1108/RSR-01-2021-0005; Marie L. Radford, Laura Costello, and Kaitlin Montague, "Surging Virtual Reference Services: COVID-19 a Game Changer," *College & Research Libraries News* 82, no. 3 (March 2021): 106–13, https://doi.org/10.5860/crln.82.3.106.
2. Kara Blizzard, "Proactive Chat in a Discovery Service: What Users Are Asking," *Internet Reference Services Quarterly* 23, no. 3–4 (October 2, 2018): 59, https://doi.org/10.1080/10875301.2019.1643435.
3. In addition to the existing static chat and newly introduced proactive chat, there are also pre-existing chat widgets for the Business Library, Education Library, and Sciences Library. When those departments are not online, chats sent to those widgets are redirected to the Wells Library queue.
4. Blizzard, "Proactive Chat in a Discovery Service"; Laura Costello and Amy Kimura, "Right-Sizing Proactive Chat Reference Service Using Trigger Time," *The Reference Librarian* 62, no. 3–4 (October 2, 2021): 193–206, https://doi.org/10.1080/02763877.2021.1970693; Michael Epstein, "That Thing Is so Annoying: How Proactive Chat Helps Us Reach More Users," *College & Research Libraries News* 79, no. 8 (September 5, 2018): 436, https://doi.org/10.5860/crln.79.8.436; David A. Hurley and Adrienne Warner, "Does Proactivity Drive Use? Understanding Growth in Chat Reference Services," *Public Services Quarterly* 18, no. 2 (April 3, 2022): 79–90, https://doi.org/10.1080/15228959.2021.1896412; Jan H. Kemp, Carolyn L. Ellis, and Krisellen Maloney, "Standing By to Help: Transforming Online Reference with a Proactive Chat System," *Journal of Academic Librarianship* 41, no. 6 (November 2015): 764, https://doi.org/10.1016/j.acalib.2015.08.018; Gary R. Maixner, Mindy M. Cooper, and Kelli Herm, "Meeting Students Where They Are: Introducing a Proactive Chat Widget to Your Website to Boost Your Chats," *Internet Reference Services Quarterly*, September 14, 2023, 1–7, https://doi.org/10.1080/10875301.2023.2255175; Linda Rich and Vera Lux, "Reaching Additional Users with Proactive Chat," *The Reference Librarian* 59, no. 1 (March 2018): 23–34, https://doi.org/10.1080/02763877.2017.1352556; Jie Zhang and Nevin Mayer, "Proactive Chat Reference: Getting in the Users' Space," *College & Research Libraries News* 75, no. 4 (2014): 202–5.
5. Hurley and Warner, "Does Proactivity Drive Use?"
6. Blizzard, "Proactive Chat in a Discovery Service," 65.
7. Bonnie Brubaker Imler, Kathryn Rebecca Garcia, and Nina Clements, "Are Reference Pop-Up Widgets Welcome or Annoying? A Usability Study," *Reference Services Review* 44 no. 3 (August 2016): 287, https://doi.org/10.1108/RSR-11-2015-0049.
8. Blizzard, "Proactive Chat in a Discovery Service"; Kemp, Ellis, and Maloney, "Standing By to Help"; Adrienne Warner et al., "Proactive Chat in Research Databases: Inviting New and Different Questions," *Journal of Academic*

Librarianship 46, no. 2 (March 2020): 1, https://doi.org/10.1016/j.acalib.2020.102134; Zhang and Mayer, "Proactive Chat Reference"

9. H. P. Grice, "Logic and Conversation," in *The Philosophy of Language, 2001*, ed. A.P. Martinich, 4th ed., 165–75 (New York: Oxford University Press, 1975).
10. Erving Goffman, *Interaction Ritual; Essays on Face-to-Face Behavior*, 1st ed., Anchor Books (Garden City, NY: Doubleday, 1967).
11. Penelope Brown and Stephen Levinson, "Universals in Language Usage: Politeness Phenomena," in *Questions and Politeness: Strategies in Social Interaction*, ed. Esther N. Goody (Cambridge, NY: Cambridge University Press, 1978), 66.
12. Brown and Levinson, "Universals in Language Usage," 75.
13. Penelope Brown and Stephen Levinson, *Politeness: Some Universals in Language Use* (Cambridge, NY: Cambridge University Press, 1987).
14. Jessica Luo Carlo and Youngjin Yoo, "'How May I Help You?' Politeness in Computer-Mediated and Face-to-Face Library Reference Transactions," *Information and Organization* 17, no. 4 (January 1, 2007): 207, https://doi.org/10.1016/j.infoandorg.2007.05.002.
15. Lynn Westbrook, "Chat Reference Communication Patterns and Implications: Applying Politeness Theory," *Journal of Documentation* 63, no. 5 (January 1, 2007): 649, https://doi.org/10.1108/00220410710827736.
16. Hurley and Warner, "Does Proactivity Drive Use?"; Kemp, Ellis, and Maloney, "Standing By to Help"; Maixner, Cooper, and Herm, "Meeting Students Where They Are."
17. Carlo and Yoo, "How May I Help You?"
18. There were two chats from 2022 that were labeled in the system as originating from the proactive chat widget. These are believed to be a system glitch, as there is no known testing of the proactive widget during the sample period.
19. Brown and Levinson, "Universals in Language Usage: Politeness Phenomena," 135.