From the President of RUSA

The Courage to Show Up

Advocacy in Times of Turmoil

Shannon D. Jones

A Season of Reflection and Resolve

October is a month rich with meaning for our profession. It comprises National Medical Librarians Month, Banned Books Week, American Archives Month, National Friends of Libraries Week, and TeenTober. Even within this single month, these observances remind us that librarianship is more than a career. It is a calling rooted in service, advocacy, and a commitment to equitable access to information.

As I sat down to write this in October, I reflected on the importance of having the courage to take action on the issues that matter and that can make a positive impact on the world around us. Each of these celebrations showcases a different aspect of who we are as librarians and what we stand for. Having spent more than twenty years as a health sciences librarian, National Medical Librarians Month serves as a vital reminder to me of the significant role we play in the healthcare environment. The goal for this observance is to highlight the many ways health information professionals contribute to advancing evidence-based care, improving patient outcomes, and empowering informed decision making.

Considering the current state of affairs in the United States, where misinformation, malinformation, and disinformation spread rapidly, where intellectual freedom is under siege, and where library workers are increasingly targeted for upholding professional ethics, these observances have renewed urgency. They remind us that our work is not neutral. Our commitment to equitable access to information, literacy, and lifelong learning, as well as inclusion and belonging, matters profoundly. These values are not seasonal celebrations. They guide our profession, especially in times of turmoil.

What these October observances say to me is this: our work is important and needed now more than ever. Advocacy, whether at the reference desk, in library administration, or in the community, is not an optional part of librarianship. It is the work. To stand for access when others seek to restrict it, to center truth when others amplify falsehoods, and to serve every member of our community with dignity and respect, these are acts of courage that define who we are.

Having the courage to show up means choosing to be present, even when the things around you seem uncertain or uncomfortable. It means standing firm in your values, amplifying your voice when silence feels safer, and acting when inaction would be easier. For me, it is summed up by the inspiration card that sits on my desk: “Speak up even if your voice shakes.”

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Advocacy as a Personal Practice

When I think about advocacy, I also think about where it began for me. Girl Scouting has been a meaningful part of my life since I was a child and now as an adult volunteer. Every October, Girl Scouts across the United States celebrate the birthday of our founder, Juliette Gordon Low, born on October 31, 1860. It was in scouting that I first learned the power of advocacy and the importance of taking action to make the world a better place.

The Girl Scout Law teaches scouts to be honest, fair, friendly, helpful, courageous, strong, and to respect ourselves and others. Those lessons formed my earliest understanding of what it means to be an advocate, to stand up for one's values, to serve the community, and to lift others as you climb.

The Girl Scout slogan, *"Do a good turn daily,"*[1] reminds scouts that we can make a difference in both big and small ways. That spirit of everyday action continues to guide me as a librarian and leader, affirming that advocacy is not only about grand gestures but also about the small, consistent acts that make a lasting impact.

The Girl Scouts also promote breast cancer awareness during October in honor of Juliette Gordon Low, who died of breast cancer on January 17, 1927.[1] Her courage and commitment to empowering girls and women continue to inspire generations of Girl Scouts to lead with courage, confidence, and character. For me, that same spirit carries into librarianship.

Advocacy in Action: Learning from Our Peers

Across the country, library associations and systems are demonstrating what sustained advocacy looks like in practice. As we look ahead, I encourage you to identify your state's next library legislative day or advocacy day and begin preparing now to participate. These events provide invaluable opportunities to share your library's impact, meet with legislators, and strengthen relationships that advance our collective mission. Regardless of the type of library you work in, your voice and presence matter. Advocacy days remind decision makers that libraries are essential resources in our communities and on our campuses. Examples from the broader community include:

The New York Library Association (NYLA) hosts an annual Library Advocacy Day to bring together library workers, trustees, and supporters to meet legislators, share impact stories, and advocate for equitable funding.

The Michigan Library Association (MLA) rallied under the theme "Libraries Light the Way!"—a joyful reminder that libraries illuminate pathways to learning, discovery, and belonging. Their framework emphasized that every library worker, regardless of title, can advocate by building relationships and articulating how libraries contribute to strengthening civic life.

On the West Coast, the California Library Association (CLA) hosts a "Day in the District" initiative, featuring the Ursula Meyer Library Advocacy Training Day. This annual workshop equips participants with the tools to communicate effectively with local and state officials and sustain advocacy throughout the year.

These efforts demonstrate that advocacy is not a one-time event. It is continuous, creative, and relational. They show how library associations build awareness, cultivate allies, and shape public policy.

Online engagement has also expanded the scope of advocacy. The Take Action for Libraries website (https://action.everylibrary.org/) allows information professionals to pledge their support

for issues affecting libraries nationwide. Through this website, library advocates can sign petitions, contact their representatives, and amplify messages that protect funding, intellectual freedom, and access to information. Sometimes advocacy begins with a single click, but when multiplied by thousands of voices, it can influence the national conversation.

I encourage you to explore opportunities in your own state or region to participate in library advocacy days, legislative visits, or statewide campaigns. Whether through a local rally, a digital pledge, or a quiet conversation with a policymaker, every act of advocacy contributes to a stronger, more resilient future for libraries.

Everyday Acts of Advocacy

Advocacy is most powerful when it becomes an integral part of our daily routine. Beyond attending Advocacy or Legislative Days, we can all take small but meaningful actions that amplify the value of libraries and the people they serve.

While everyday acts of advocacy are important for libraries, they are equally important for the issues that matter most to you. The same principles that drive us to defend intellectual freedom, equitable access, and literacy can be applied to other causes that shape our communities and our world. Whether your passion is health equity, environmental justice, literacy, or social inclusion, advocacy enables you to use your voice to make a meaningful difference.

Each of these actions, no matter how small, reinforces the idea that advocacy is not reserved for specific roles or occasions. The responsibility to be advocates belongs to all of us, every day, in everything we do.

Timeless Lessons in Advocacy

Advocacy has been a constant thread in librarianship's evolution. Kirchner offers guidance encouraging librarians to "Make it your business to stay in business," which remains just as relevant today.[2] Kirchner encouraged librarians to promote their libraries, build networks, understand their allies, and see advocacy as a learned skill rather than a spontaneous act.

Dr. Camila Alire in collaboration with Patty Wong and Julie Todaro, launched "52 Ways to Make a Difference – Public Library Advocacy Throughout the Year." This initiative provided a full year of advocacy ideas, one for each week, encouraging every library worker to integrate advocacy into their daily practice. Their message was clear: advocacy should not begin at the point of crisis but rather be built into the library's culture itself.[3]

Building on that tradition, Pionke et al. reaffirmed that advocacy is not the work of a few. It is the shared responsibility of all. The authors' study of MLA members identified three key themes: vulnerability, voice, and value. Medical librarians, they found, are seeking stronger national advocacy, greater visibility, and tangible tools to communicate their impact.[4]

From Kirchner to Pionke, the message is consistent: advocacy is both tradition and transformation.

Advocacy Extends Beyond October

The lessons of advocacy are timeless, but October gives them greater meaning. It is a month filled with worthy causes that remind us why our work matters and why it must continue. Advocacy is what was on my heart when I began writing this piece, surrounded by observances that honor who

we are and what we stand for. However, advocacy cannot be confined to a single month. It is the daily practice of living our values out loud, standing for truth, equity, and access even when it is uncomfortable.

Here are a few reminders I carry with me:

1. **Recognize your privilege and use your voice.** Each of us holds influence through our roles, our networks, or our access to resources. Use it to raise awareness, amplify the voices of historically excluded groups, and champion the right to read.
2. **Understand that advocacy looks different for everyone.** There is no single path. Advocacy may look like attending a rally, mentoring a colleague, or supporting a cause that aligns with your values. Every action matters.
3. **The most important thing is to act.** Advocacy is not passive. It is a verb. Small steps can have a powerful ripple effect.
4. **Keep going.** Advocacy is lifelong work. It requires endurance, empathy, and renewal. Progress happens through persistence.

I invite you to choose where you will align your advocacy efforts and to take actions that are appropriate for you and that fit into your life. You have to have the courage to show up for libraries, or for whatever issue is important to you and your sphere of influence. Advocacy is not about doing everything; it is about doing something, consistently, intentionally, and with purpose. Each of us has a role to play in advancing the work of libraries and the values that sustain our profession. When we act with conviction and compassion, we honor our shared belief that better information leads to better decisions and better lives.

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For Your Enrichment

Integrating Technology and Human Interaction with a Library Reference Chatbot

Robin Fowler and Kelly Handy

For Your Enrichment is an occasional column that offers a platform for pieces that are of interest to the work of librarians, but that might not otherwise fit in one of the traditional *RUSQ* column areas. I was intrigued here by the concept of maintaining the human connection while utilizing AI.

Based on the Florida Association of College and Research Libraries (FACRL) Poster Presentation, "'Are You a Bot?' Implementing a Chatbot While Keeping the Human Connection in Virtual Reference," October 25, 2024, and the Professional Development Alliance of Library Consortia online seminar, "'Are You a Bot?' Merging Technology and Human Interaction Through the Implementation of a Library Reference Chatbot," (invited) March 27, 2025.—*Editor*

Introduction

Virtual chat reference has been a point of service within the George A. Smathers Libraries at the University of Florida (UF) since 2000,[1] adopted then as an emerging technology. Even after joining the state of Florida Ask a Librarian (AAL) cooperative hosted by the Tampa Bay Library Consortium (TBLC) in 2006 and expanding the coverage provided to the UF community and other state libraries in Florida, live chat remained an underutilized service for several years. With the onset of the global pandemic in early 2020, when lockdown sent everyone home and online for work, school, and research, the virtual reference service became the primary service point in the library. The staffing of the virtual reference desk had to be tripled to keep up with the demands of the university community's needs. Following lockdown and return to campus, virtual reference at the Smathers Libraries maintained a steady flow of business, requiring staffing of the virtual desk to remain at pandemic levels. And because "virtual reference, especially chat, is highly appealing to patrons for its convenience and immediacy,"[2] the virtual reference desk had evolved into a key service point in the Smathers Libraries. As the libraries returned to some sense of normalcy post-pandemic, addressing ways to further improve the virtual reference model in the Smathers Libraries was logical.

Through the implementation of a rule-based chatbot, the Smathers Libraries would be able to continue offering a high standard of reference service[3]; the chatbot would be able to interact directly with patrons, "providing instant access to information about books, journals, and other resources available at the library,"[4] as well as provide answers to directional and circulation queries.

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Patrons would be able to receive help from reference services in the mode that makes them the most comfortable: in person, via live chat, or by clicking through the options provided by the chatbot.

Background and Objectives

In August 2023, Springshare, the platform that hosts UF's chat service and many other library services, announced the arrival of its rule-based chatbot product. Though the usage volume of the UF AAL service had begun to taper off slightly in 2023 (still higher than prepandemic usage), it was brisk enough to consider incorporating the Springshare chatbot product into the existing service. The potential benefits of a chatbot are clear; the bot could intercept more commonly asked reference queries and answer them, allowing patrons with more complex reference questions to spend time with online librarians getting help. The AAL service could be available to the UF community twenty-four hours a day, seven days a week, without having to physically staff the virtual desk, a difficult undertaking during later hours when fewer library workers are available. The benefits to the broad range of patrons served are also numerous; students often view live chat reference favorably as a more personalized and often conversational experience. To achieve this goal, according to Mawhinney, "service providers can personalize interactions by using their first names to identify themselves during interactions and/or provide their contact information at the end in case users have follow-up questions."[5] Further, certain students who feel library anxiety, or a hesitancy to approach a physical service desk out of fear of feeling inadequate or seeming unfamiliar with the library, benefit from the anonymity that live chat and, to more of an extent, a chatbot offers.[6] With the implementation of a rule-based chatbot, both goals could be achieved. There is, however, one drawback to a rule-based chatbot: the creators of the chat flows have to accurately predict the direction of the "conversations" the chatbot will have with patrons, which would be specific to the type of query it is being asked, with the knowledge that the chatbot will be the manager of the interaction with the patron.[7]

For the purpose of this discussion, it is important to examine the differences between a rule-based chatbot and an AI (artificial intelligence) chatbot. A rule-based chatbot operates as a flow chart, following sets of preprogrammed question strings and extracting responses from a preloaded question bank.[8] An AI chatbot uses machine learning and can understand a user's question as it is manually typed into the product. It can seem more conversational and more nuanced, providing layered responses to more complex queries. The Springshare rule-based chatbot is not interactive in the way that an AI chatbot is. Patrons cannot type their questions into the product to receive feedback. They must follow the predefined options set in the chat flows.[9] The chatbot will never stray from the predetermined language of the creators of the chat flows and will never "learn" to say anything other than what it was "taught" to say. As a fully customized product, building the bank of questions and series of answer flows for the UF chatbot was no small undertaking. Because the UF Libraries were already paying for a long-term subscription for Springshare services that included a rule-based chatbot, building an AI chatbot was never a real consideration. One of the most appealing features about the Springshare rule-based chatbot was the readily available platform from which to launch this additional service. Additionally, artificial intelligence was a bit of an undiscovered frontier in late 2023 and had not yet asserted itself into all corners of the library world. Machine learning was somewhat intimidating, and the notion that a generative AI product would potentially distribute incorrect information seemed too much of a risk to take at that time.

In January 2024, a team of experienced virtual reference operators (located at various on- and off-campus library locations) came together to create a rule-based chatbot using the Springshare

chatbot product. In the initial planning discussions of incorporating a digital assistant into the virtual reference service, one goal was principal above all others: the chatbot would not completely erase the human component from the virtual chat reference experience. The human interaction and the point-of-need availability of trained library operators remained paramount to the service. The role of the chatbot would be to make simple library queries answerable immediately for patrons and at all times of day or night. Using Springshare's chatbot tool, the implementation team was able to successfully integrate this extension of service into the existing LibChat platform through survey, analysis, chat flow creation, implementation, and continuing assessment of the tool through statistics.

Methodology

First Steps and Implementation Team Formation

On August 1, 2023, TBLC began beta testing on the chatbot feature, employing the help of several libraries that participate in the consortium. The UF AAL site coordinator chose not to take part in beta testing due to a few factors. In the beginning stages of researching the feasibility of integrating the chatbot, it appeared the best way to create the chat flows would be to use the existing Frequently Asked Question (FAQ) modules. Because UF's FAQ section had historically been open to all operators for contribution, there were many incorrect, duplicate, and outdated entries. The time commitment to reconstruct the FAQ section on top of creating chat flows would have been prohibitive, but the chatbot was not off the table for the future. The decision to finally implement the chatbot feature was made in December 2023 after attending training sessions where the AAL site coordinator learned of alternative (though no less simple) methods of implementation. The site coordinator invited four experienced virtual reference operators to collaborate on the project to create the George A. Smathers Libraries' first virtual reference chatbot.

Prior to the first Chatbot Implementation Team meeting, team members viewed applicable Springshare training videos to get a sense of the work ahead. The AAL site coordinator (and leader of the implementation team) also reached out to a few of the institutions that took part in TBLC's beta testing and received useful feedback and advice on where to begin in the process, confirming suspicions that using FAQs would work best only if they were already updated and robust. The team met on January 10, 2024, to begin the work toward creating the chat flows for the new chatbot. The first steps included formalizing the goals for the chatbot, holding preliminary discussions on creating layered chatbot flows to guide patrons to the answers they were searching for, and learning how to create the question bank from which the chatbot would extract those answers.

Survey

In discussions about potential topics to include for the chatbot, the team decided that the best source from which to glean that information would be the virtual chat operators who staff the UF Libraries virtual desk daily. Using a Google Forms survey, the team asked for the UF AAL chat operators' aid in identifying the more commonly asked and easily answered questions they were fielding during their chat shifts. The team distributed the survey to 91 Smathers Libraries employees on the AAL chat operator distribution list on January 18, 2024, and were asked to submit completed surveys within one week.

The survey consisted of the following questions:

- How many hours per week do you work on Ask a Librarian?
- What times are your shift(s)?

- What types of questions do you get asked most often? (This survey question was enabled with multiple prechosen options and included space for open-ended responses.)
- If you are comfortable with us reaching out to you to ask further questions about the chats you answer on Ask a Librarian shifts, please leave your name below.

Of the thirty-five responses received, thirty-two chat operators listed one of their most frequently asked questions during their virtual desk shifts as "Can you help me find this journal article/book/ebook?" This response, along with the other top recurring queries identified in the survey (Table 1), helped the team begin to design chat flow categories that would be most beneficial to the UF community using the chat service.

Initial Categories and Chat Flows

The team created an initial set of categories based on feedback from the surveys:

- Complaints and Concerns
- Reservation Questions
- Building Information Questions
- How Do I?
- Other

Table 1. Top Responses from Chat Operator Survey

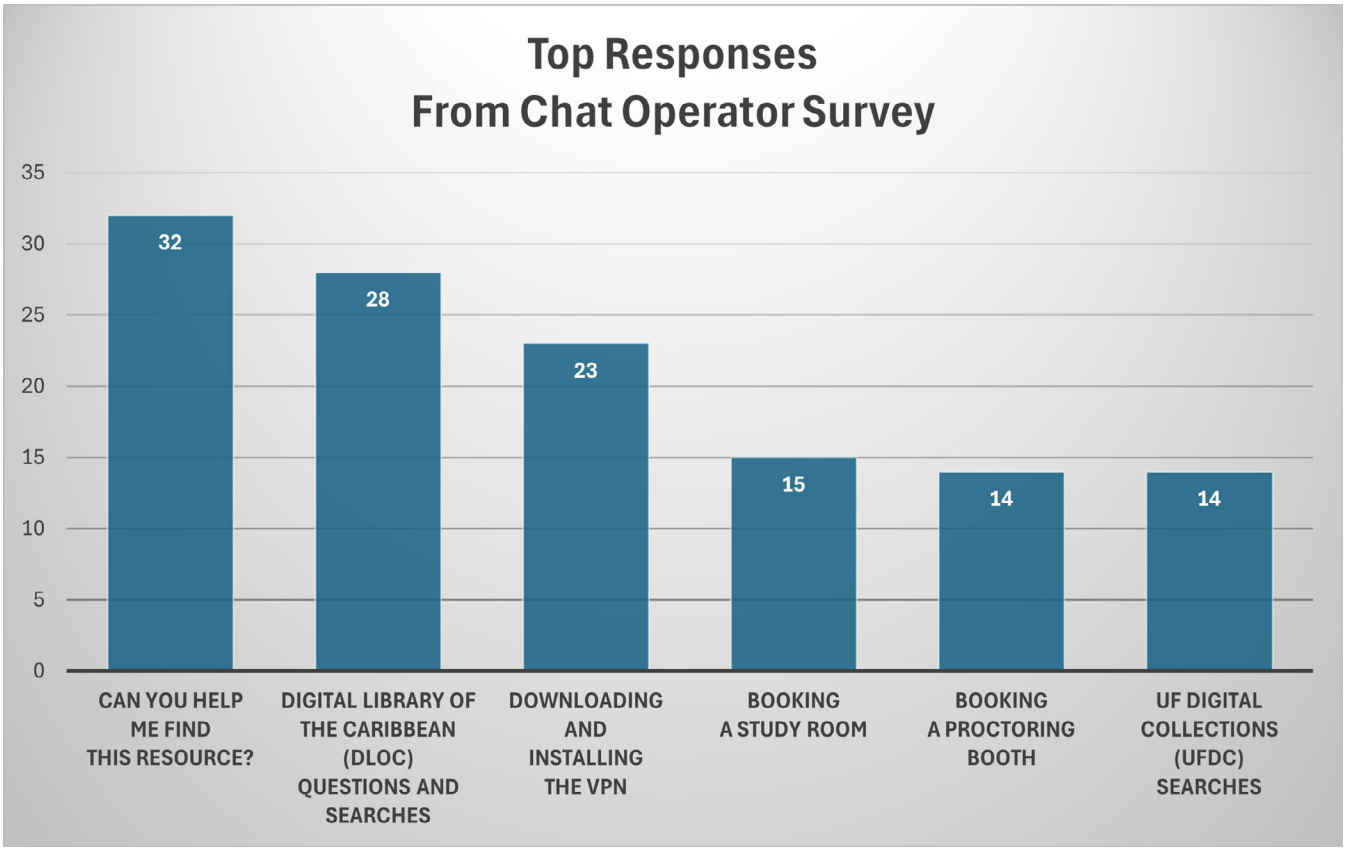

Table 1 shows the top six most commonly asked questions reported by the thirty-five Ask a Librarian chat operators who responded to the survey designed by the chat implementation team.

Through brainstorming sessions, the team determined what specific answers should be located under each category. From there, each team member selected a category and began to map out the question bank and chat flows that would live within that category. It was at this point that the team agreed that embedding the option of speaking to a live chat operator (if available) in every step of every chat flow was necessary. The team used a Microsoft Teams group to create lists of categories with commonly asked questions related to those categories (each team member had one or two categories to work on), followed by appropriate responses to those questions. Each team member could view all work being done on these early chat flows and offer feedback or corrections. During regular meetings through this phase of the project, the team reviewed each flow together and edited for correct information when necessary. Team members also began exploring the chatbot features in LibChat to gain a deeper understanding of how the chatbot platform worked and how chat flows would be linked to the question bank.

In these first stages of development and discussion, it quickly became clear that some of the chat flows were too convoluted, with too many pathways that could potentially confuse or frustrate patrons. As the team started to understand the capacity and limitations of the chatbot product and its creation process, they took a simpler approach to the chat flows to maintain the scope of the project: quick answers for the more commonly asked questions. Shortening the flows would alleviate the potential for a patron to be led down the rabbit hole, become frustrated, and leave the chatbot without receiving the help they needed or opting to transfer to a live chat operator.

Final Categories and Constructing the Chat Flows

To better visualize the chat flows, a team member constructed a flowchart of the specific chat flows to show how each topic would build off previous responses and how many levels deep to take the initial chat flow (Figure 1). Throughout the development of the final chat categories, some of the original categories were broken down even further in the interest of streamlining the length of the chat flows. The final categories were:

- Access Library Materials
- Complaints and Concerns
- Study and Testing Rooms
- Printing and 3D Printing
- Another Problem

The team included the additional category of "Another Problem" to help direct patrons to the public service desks at the library branches for urgently needed assistance. The goal was to launch a chatbot that would be usable but not confusing, and that would still offer quick answers to patrons' queries and an option to speak with on-shift live chat operators (when available) or submit a ticket that a library affiliate would address as soon as possible. Ongoing maintenance of the chat flows over time by the AAL site coordinator was also on the minds of the implementation team members; the coordinator should be able to easily make corrections, updates, and additions through monitoring of the statistics and transcripts in the interest of continuous improvement and accuracy.

Final construction of the primary chat flow and question bank occurred in early August 2024. During this session, the team focused on standardizing the language of each chat flow worked on by individual team members. This was for consistency throughout the flows and to ensure there was no "library jargon" or library acronyms being used that a patron might be confused by or not understand. The team also tried to limit the number of flows per question, striving for no more than three under each branched-off section of the main categories, when possible. To satisfy the goal

of keeping a connection between patrons and live chat operators, the option to connect to one of them (if available) was included in the answer selections for each level of the chat flow. It was also added later as an option with the final categories when patrons activate the widget for the chatbot. Further, the team included a way to return to the beginning once the patron reached the end of the existing flow if they indicated they had not received the answer they were looking for. If the patron received help and had no further questions, they would be thanked for using the service and the session would end, prompting them to rate the chat experience.

In terms of aesthetics, the implementation team thought the chatbot should take on a friendly persona. The team proposed a "friendly gator librarian" avatar (the UF students are The Gators, after all) for the chatbot, and affectionately named her "Alice," after a campus landmark (Figure 2). Using an AI image–generating program and some customization by the Libraries Communications team, the team brought Alice to life. Once a patron clicks on the chat widget to initiate an interaction with Alice, they receive a friendly greeting from her along with the chat flow options to begin their virtual reference journey.

Chatbot Testing and Launch

Beta testing was a crucial step in the final stages of development of the chatbot. A team member created a chatbot testing zone through an internal TBLC webpage to allow a secure space to extensively test the chat flows. Once the implementation team concluded their testing and made minor adjustments in the flows, the AAL chat operators who responded to the survey were invited to review the chat flows and try to "break" Alice. The implementation team encouraged the chat operators to submit feedback and suggestions within one week.

Among the comments received after the chat operator testing period began were minor updates and clarifications to the language used, adding nonlibrary spaces on campus for some resources, and a way to easily return to the current chatbot flow to find additional answers on the same general topic. Unfortunately, due to limitations in the Springshare chatbot platform, the team was not able to complete the suggested flow changes within the same general topic. Alice went live on August 21, 2024, as the first George A. Smathers Libraries chatbot.

Discussion

Developing the chat flows and getting Alice ready for launch was not without obstacles.

Limitations of the Springshare interface compelled the team to scale back the initial intended scope of the project. The team found the platform used to design the chatbot flows to be difficult to navigate and unnecessarily complicated when creating flows with multiple levels. The design of the Springshare chatbot product forced the team to create a separate and unique chat flow for each topic. In the interest of time, the team scaled back and created a series of chat flows that were more simplified with a limited number of flow levels. On the plus side, this calibration of the chat flows made it an easier product for patrons to navigate, keeping the chances of getting lost in too many options at a minimum. Further, due to being part of the TBLC cooperative, the team had limited access to the full Springshare product (and the UF portions of the LibChat dashboard) and had limited creativity in terms of naming conventions and chat flow language. The team wanted to create unique names for each of the flows. Because other participating institutions could view the chat flow information in the admin dashboard, the naming convention of each flow required a more traditional and simple institution identifier. The limitation of the statistics available to the team

has also proven to be a source of frustration. More robust and thorough data when running usage reports would help the AAL site coordinator make continuous substantive improvements to Alice.

Another example of limitations met by the team was the ambiguous interpretation of each type of chatbot status within the chatbot statistics. While "Sent to Live Chat" and "Ticket Created" statuses have proven themselves to be straightforward when reviewing reports, the difference between "Incomplete," "Successful," and "Resource Clicked" are often unclear. "Resource Clicked" (Figure 3) and "Incomplete" (Figure 4) chat flow statuses regularly look similar when reviewing the transcripts, making it difficult to determine whether patrons are truly getting the help they need, where they are being directed to after their last chatbot interaction, or if the resource information has helped them at all. Because these chats do not officially end, the team is also not able to get any patron feedback on the service. One benefit of chat flows deemed "Successful" is that they show the chat ended. A truly "Successful" chat flow shows the patron located the resources or information they needed, and all their questions had been answered to their satisfaction (Figure 5). However, some of the chat flows categorized as "Successful" by Springshare do not have satisfactory conclusions. They either end immediately without any resources being clicked or with the patron stating their questions were not fully answered (Figure 6). These seemingly ineffectual interactions hinder the review of statistical data.

The time commitment of the project, from first design to final launch, was more than the team originally estimated. The team first sought to launch the chatbot within a few months of the project's start. In total, the project took nine months to complete. Due to the disparate schedules and locations of the team members, virtual meetings were the standard way the group collaborated, which made both scheduling to work together and creating cohesive and consistent language among the chat flow drafts difficult. When the team gathered in the same room, they completed the remaining tasks much faster and more efficiently.

Early analysis of transcripts and other data points shows that Alice is doing her job (Table 2). The information Alice delivers to patrons on chat is accurate and current, in keeping with the implementation team's work to populate the flows. Patrons that need more in-depth assistance are able to receive it from the live library workers staffing the virtual reference desk. Very few patrons have expressed dissatisfaction or made recommendations to the service; to date there has been a relatively low rate of feedback (24 total comments out of 6,719 interactions), with only two patrons (or roughly .03%) requesting the ability to type their specific questions rather than following the predetermined flow of questions. Further, 127 ratings (or 1.89%) of Alice have been provided by patrons, with an average rating of 3.5 out of 5. Two other patrons typed desired research queries into the comment box, which offers valuable insight into types of question flows that can be added to the chatbot. Enough queries have been intercepted and sufficiently addressed that the current AAL site coordinator, who handles building the shift schedule for the service, has been able to decrease the depth of hourly shifts from three operators to two. Since the launch of Alice, the current AAL Site Coordinator has continued to update and improve the chat flows based on statistics and feedback received from patrons.

Conclusion

The intent behind implementing a rule-based chatbot was never to replace the already robust virtual reference service provided by experienced live chat operators at the Smathers Libraries. The chatbot's role was to expand the service by creating another contact point for patrons seeking library assistance. Information seekers sometimes need help when there is no live chat operator

available, and the rule-based chatbot, Alice, can fill those gaps by providing answers to more basic queries. Information about library hours or printing in the libraries can be answered via website links or by directing the patron to submit a help ticket that can be addressed as soon as a librarian is available. During live chat operational hours, Alice fields those less complex questions and invites all patrons to speak to a live operator to assist with more intricate reference queries.

Surveying the current AAL operators was a helpful first step in developing the chat flows for the chatbot. Their experience provided valuable "boots on the ground" data about what types of information patrons are looking for. Based on that feedback, the team developed an initial list of categories from which to create efficient chat flows. Through trial and error, along with beta testing, the implementation team finalized a series of chat flows and a robust question bank using the Springshare LibChat product. Alice directs patrons to the appropriate library websites for answers to commonly asked questions while always providing the patron with the option to speak to a live chat operator, submit a ticket, or restart the interaction. The combination of simple but thorough chat flows and Alice's pleasant and whimsical appearance puts a friendly face and tone on a service that could be perceived as cold or impersonal by some patrons (and curtailing the often-asked question, "Are you a bot?" when a patron is speaking with a live chat operator). Since its launch, the chatbot has been a successful addition to the AAL virtual reference service at UF, intercepting and answering enough patron queries to allow for a reduction in the volume of physical staffing. The process of determining the types of questions Alice would address, the length and depth of the chat flows encountered by patrons, and the creation of those chat flows in the LibChat chatbot interface was sometimes frustrating. Nevertheless, the implementation team accomplished their goal of merging technology with human interaction in the virtual space of the library, giving patrons an added point of service whenever they need help from a librarian.

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Amplify Your Impact
Yvonne Dooley, Col. Ed.

The Challenges of Marketing School Library Programs

Eboni M. Henry

Introduction

As a librarian with more than 20 years of experience in both public and school library settings, I have developed a strong understanding of how effective communication and marketing can enhance library engagement. My collaboration with communications and marketing departments in public libraries has been instrumental to my success in promoting programs and services within school communities.

During the COVID-19 pandemic in 2020, social media became an essential tool for maintaining connections with students and parents by allowing me to share library resources, virtual events, and updates efficiently without relying solely on mass emails. Additionally, my background in English, complemented by coursework in communications, has been invaluable in shaping my approach to marketing library programs and crafting messages that resonate with diverse audiences. However, I recognize that many librarians may not have had the same training or background in communications, which can create challenges when developing and executing marketing strategies for library programs.

School libraries have evolved from repositories of books to dynamic learning spaces that integrate technology, foster collaboration, and support multiple literacies. However, the perception of the library's role has not always kept pace with this transformation. Effective marketing is essential to communicate the library's value to students, educators, and administrators. Yet, marketing within the context of school libraries presents distinct challenges due to structural, financial, and professional limitations. School libraries are dynamic learning hubs that foster literacy, creativity, and lifelong learning. However, many students, parents, and even teachers remain unaware of the full range of services libraries offer. Marketing these programs effectively can help bridge that gap—yet librarians often face significant challenges in doing so. Understanding these challenges is the first step toward overcoming them and ensuring that school library programs receive the recognition and engagement they deserve.

Limited Funding and Resources

Most school libraries operate with limited budgets that prioritize materials acquisition, technology upgrades, and staffing rather than promotional activities. As a result, marketing initiatives—such as digital campaigns, events, and printed materials—are often underfunded or absent altogether.

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Without dedicated marketing staff, librarians must take on the additional role of marketer, often without formal training or support. Finding low-cost or free ways to promote library programs becomes essential but challenging. In many cases, the responsibility for marketing falls solely on the librarian, who must manage these efforts alongside other demanding instructional and administrative duties. Other school librarians and I use social media platforms, such as Facebook, Instagram, LinkedIn, and X, to showcase our work and promote programs. According to Mamta Tomar's article, "Challenges and Strategies in Marketing Academic Libraries Using Social Media," social media–based marketing for libraries is promising, but practical issues such as content relevance, algorithm changes, and maintaining audience engagement constrain its effectiveness.[1] Some schools have amazing parent support and assistance to aid them in promoting programs and initiatives.

Lack of Awareness and Outdated Perceptions

Another challenge lies in public misconceptions about the library's purpose. Many stakeholders continue to associate the school library primarily with book lending, overlooking its contributions to research skills, digital literacy, and academic collaboration. This limited understanding reduces engagement and support from teachers, students, and parents. Changing these perceptions requires consistent communication and advocacy, which are difficult to sustain without institutional backing or marketing expertise. Overcoming this outdated perception requires consistent communication and creative outreach—but doing so takes time and resources that school librarians may not have. The American Library Association Committee on Library Advocacy has created a helpful Advocacy Action Plan Workbook for libraries and library workers to empower them stand up for what is needed and what they desire.[2]

Competing Institutional Priorities

Within schools, library programs must compete with numerous academic and extracurricular initiatives for time, attention, and resources. Administrators may prioritize standardized testing, classroom instruction, or extracurricular achievements over library-based learning. Consequently, library events and programs may receive limited promotion through official communication channels, diminishing their visibility within the school community and leaving the library's contributions less visible. This competition makes it difficult to schedule library events or secure time in assemblies, newsletters, or social media channels to promote programs.

Lack of Marketing Training and Expertise

School librarians are typically trained in information science and pedagogy, not in marketing or communications. This skills gap poses a significant barrier to developing effective marketing strategies. Without a background in audience analysis, branding, or digital media, librarians may struggle to design campaigns that resonate with their intended audiences. Moreover, marketing literacy is rarely included in library science curricula, leaving many practitioners to learn these skills independently. Most librarians are trained educators and information specialists—not marketers. As a result, many feel uncertain about how to design effective marketing strategies, use social media, or create engaging digital content. Without proper training or guidance, marketing efforts may not reach their intended audience or have the desired impact.

Technological and Policy Constraints

Although digital platforms offer cost-effective avenues for promotion, librarians often face technological and policy limitations that restrict their ability to engage with these tools. Some school districts impose strict rules governing social media use or website content, limiting opportunities for outreach. School websites might be difficult to update, or social media use may be restricted by district policies. Additionally, disparities in technology access—such as outdated websites or limited design tools—can impede the creation of visually appealing and interactive marketing materials. These limitations make it harder for librarians to reach their audience in modern and engaging ways.

Difficulty Measuring Impact

Evaluating the effectiveness of marketing efforts presents another challenge. Libraries often lack formal mechanisms to track participation, assess user satisfaction, or analyze the impact of promotional activities on library usage. Without quantitative or qualitative data, it becomes difficult to justify the need for marketing investments or to refine strategies based on evidence. Even when marketing is done, measuring its effectiveness can be challenging. How do you know if more students are visiting because of a campaign or because of a new assignment or free food? Without clear metrics or feedback systems, it's difficult to refine strategies or demonstrate the library's value to stakeholders like administrators and school boards.

Sustaining Engagement

Even when initial marketing efforts succeed, maintaining long-term engagement can be difficult. Library programs must continually adapt to changing curricula, turnover in educators, and new goals and technological contexts. Sustaining visibility requires ongoing innovation, collaboration with teachers, and a clear alignment between library initiatives and the school's educational goals. Even when a campaign or program succeeds, maintaining interest is an ongoing challenge. Students' attention shifts quickly, and school calendars fill up fast. Librarians must continuously adapt, finding fresh, relevant ways to highlight programs and keep the library visible in the school community.

Conclusion

The marketing of school library programs is a complex process shaped by financial, institutional, and professional challenges. Although librarians recognize the importance of promoting their programs, their capacity to do so effectively is often limited by external and internal constraints. Addressing these challenges requires systemic support from school leadership, professional development in marketing strategies, and the integration of advocacy into library practice. By overcoming these barriers, school libraries can enhance their visibility, demonstrate their educational value, and strengthen their role as essential partners in teaching and learning.

The challenges—from limited resources to competing priorities—can be daunting, but they are not insurmountable. By building partnerships with teachers, leveraging social media where possible, and demonstrating the library's impact on learning, librarians can gradually raise awareness and strengthen their programs' presence within the school. Those librarians and information professionals who have developed strong skills and found success in this area have an opportunity to pay it forward by leading trainings, webinars, and conference sessions that empower others

to enhance their marketing and outreach efforts. Ultimately, effective marketing ensures that the library remains not just a place of books, but a vital and celebrated part of the educational experience.

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Management
Julia Martin, Col. Ed.

Third Spaces in Academic Libraries

Peter J. Klubek and Tiffany J. Ellis

What Is a Third Space?

This is a good question, and one that libraries have been considering for years. At the Edith Garland Dupré Library on the campus of the University of Louisiana at Lafayette, we have been thinking about this concept and exploring how it shapes the way we engage with knowledge, community, and creativity. What we have provided here is not presented as an exhaustive or overly authoritative report but instead provides enough information to illustrate our thought process and highlight the types of research that guided, and continues to guide, the development of our programs.

The American Library Association (ALA) has endorsed the concept of a third space—a place differed from home and work where individuals seek conversation, neutral ground, and a sense of connection.[1] Common examples of third spaces include coffee shops, bars, and churches. Libraries, too, can serve as third spaces, offering an environment that fosters relaxation, focus, and community engagement.

James K. Elmborg has written extensively on the evolving role of libraries in response to social and technological changes.[2] He argues that libraries must go beyond mere marketing strategies and physical renovations to create a unique user experience. Unlike commercial entities such as bookstores or cafes, libraries are distinguished by the presence of librarians—professionals who actively shape the space to facilitate engagement, knowledge-sharing, and personal growth. According to Elmborg, libraries should function as inclusive spaces where users can feel comfortable, connect with others, and work toward a more equitable and just society.

In another study, Elmborg et al. explored the idea of academic libraries serving as both physical and intellectual third spaces, or spaces of the mind.[3] They emphasized that academic libraries play a crucial role in helping learners develop their academic voices. The authors argued that the ability to express oneself authentically within an academic setting is a liberating experience that fosters deeper self-awareness. Their research introduced initiatives that reposition librarians and professors, not as rigid authority figures, but as guides who help students navigate their academic journeys. By creating a supportive environment, these projects encourage students to relax, focus, and engage with their intellectual development in a more meaningful way.

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Student Perceptions of Library Space

Philbin and Nichols conducted a survey of nearly 300 students to assess how library spaces are perceived and used.[4] Their findings highlighted the need for a balance in library design—students desire spaces that support a variety of activities, from studying to socializing. The researchers also examined the effectiveness of recent library renovations in meeting student needs. In light of the COVID-19 pandemic, they suggested that libraries should integrate remote technologies such as Microsoft Teams, Zoom, and GoToMeeting more effectively into their physical spaces to support hybrid learning and collaboration.

To better support our students, we strive to understand their perceptions and use of the library by collecting and analyzing data from various sources. The findings provided by the Office of Institutional Research offer valuable insights into our student demographics:

- Total enrollment: 14,386 students
- First-time freshmen: 3,064 students
- 45% minority, 59% female, 39% first-generation students
- 24% of graduate students are international
- 58% of undergraduates transferred from a two-year college

Additionally, formal and informal surveys led by the Head of User Engagement gathered direct feedback on library services and spaces in 2023. The findings from these surveys inform much of the information shared here. By reviewing these studies alongside institutional data, we can assess how to better serve our students and other users—ensuring the library continues to be a vital and welcoming third space where everyone can relax, focus, and connect.

Relaxation

Stress relief activities play a crucial role in helping individuals navigate the intense demands of academic life, particularly during high-stress periods like finals week. Dupré Library offers a range of events aimed at easing anxiety and promoting relaxation. These efforts are coordinated by the Head of User Engagement, in collaboration with the Head of Research and Access Services.

One such initiative, coordinated by the Head of User Engagement, is the partnership with massage therapy students from local training programs. This includes outreach to the Sports Rehabilitation program at the University of Louisiana at Lafayette. Through these collaborations, student massage therapists provide free massages to library users during the week of final examinations. These sessions offer a soothing break from the stress of studying and can help reduce muscle tension, improve circulation, and boost overall well-being. Additionally, events like *Puppies and Popcorn*, which bring therapy animals—including miniature horses—into the library, are made possible through a partnership forged by the User Engagement Librarian and Pet Partners, a local pet therapy volunteer organization. These visits offer comfort and emotional support, giving students the chance to interact with gentle animals in a calming environment. Research has shown that such interactions can reduce anxiety and improve mood, creating a peaceful respite in the midst of hectic study schedules. In conjunction with these group events, the library also offers stress-relief activities for those seeking quieter, solo experiences. Puzzles and coloring stations engage students in meditative and calming activities that help clear the mind. Puzzles promote problem-solving while offering a distraction from academic pressures, and coloring allows individuals to tap into their creative side, providing a relaxing outlet for stress.

To further support student wellness, cozy, quiet spaces have been designed to minimize external stimulation, fostering mindfulness and introspection. Two of these areas, known as the Dupré Dens (Figure 1), provide a sanctuary away from the noise of daily life, with comfortable seating and a soothing, calming atmosphere that encourages students to recharge—whether through leisurely reading, quiet reflection, or simply taking a moment to decompress. The Head of Research and Access Services and Head of User Engagement played a key role in identifying these spaces, purchasing bean bags, and helping to enhance the aesthetics by creating visually appealing backgrounds. This thoughtful design allows students to escape the stress of their studies and find a peaceful retreat within the library.

Incorporating these activities into the library's offerings is not only about stress relief—it's also about supporting the overall well-being of students. Whether through therapeutic massage, therapy animals, or quiet spaces for individuals and small groups, these programs create meaningful opportunities for students to restore balance and prepare to meet their academic challenges with renewed energy.

Figure 1. The Dupré Dens feature cozy bean bag seating and a vibrant mural created from book jackets of titles available in the library's collection.

Focus

Focus-generating activities are essential in fostering an environment where students can work effectively, engage deeply with their studies, and stay productive. Peer-to-peer tutoring programs in library spaces are invaluable resources for academic success, offering students the opportunity to work with their peers in a collaborative, supportive setting. These tutoring sessions provide a space where students can reinforce their understanding of course materials, clarify concepts, and receive guidance on assignments, helping them stay on track during critical academic periods. Having the Writing Lab in the library is also a key element in helping students generate focus and work effectively. Whether students are drafting papers, refining essays, or working through revisions, the Writing Lab provides tailored feedback that helps them stay on track and enhance their writing skills. Librarians offer readily available research support for students, providing expert guidance on tasks such as developing research questions, locating and evaluating scholarly sources, and organizing their work. Access to both peer and expert support enables students to sharpen their focus and enhance the depth of their academic work.

The library's study spaces are designed to cater to different needs and preferences, helping students to concentrate in a way that best suits their style. Noise levels are thoughtfully managed through the library's strategic layout, with quieter spaces becoming more pronounced as you move toward the top floor. The higher you go, the quieter the environment, providing the perfect backdrop for students who need uninterrupted focus for deep study. To further expand study space options, the Head of Research and Access Services coordinated with the Graduate School to open up the

Graduate Computer Lab as additional study room space. Additionally, the Head of Research and Access Services worked closely with the Head of User Engagement to communicate the availability and usage policies of these study rooms to students. On each floor, individual and group gathering spaces are available, including private study rooms and carrels for students who need a more isolated setting to work (Figure 2). These spaces, along with mobile whiteboards for flexible use, provide students the freedom to brainstorm, collaborate, study, and engage in active learning within an environment tailored to their needs.

Figure 2. Open-concept study carrels designed to minimize visual distractions while maintaining a sense of openness. Each carrel features a partial enclosure that blocks peripheral views, helping students stay focused without feeling isolated.

Connect

In the library, fostering a sense of connection is a key component of creating a welcoming and engaging community for students, staff, and visitors. By incorporating activities that revolve around diverse cultures and special interests, the library creates opportunities for individuals to come together, share their passions, and learn from one another. These events not only enhance the library's role as a space for academic study but also as a hub for cultural exchange, creativity, and activism.

The main way the library has fostered connections is by embracing the diverse identity of the university community through a variety of engaging events. These events are organized by the Head of User Engagement, with questions and additional support answered by the Head of Research and Access Services. One popular event is anime watch parties, where fans gather to eat ramen while watching episodes of popular anime series and discuss themes, characters, and plot twists. Music jam sessions, featuring various genres, bring together students and community members to play instruments, sing, and improvise. These musical gatherings create a relaxed, creative space for individuals to connect through sound, whether they are seasoned musicians or beginners, fostering collaboration and building community through shared rhythm and harmony.

Themed events offer a sense of camaraderie, creating a space where shared enthusiasm and passion can thrive. The Head of User Engagement organized food tastings focused on special diets based on health, personal beliefs, or dietary restrictions. Through thoughtful planning, these tastings offered students the opportunity to experience diverse dietary styles while encouraging dialogue about health and nutrition. The library has also embraced the interest in paranormal activity by hosting ghost hunting events, coordinated by the Head of Research and Access Services. To create a truly atmospheric experience, the Head of Access Services arranged for staff and extended library hours to allow the paranormal activities to take place after hours, when the night setting adds to the mystery. These events combine a sense of adventure with local history, as attendees explore local legends and try their hand at ghost-hunting techniques. It's an exciting way for people to connect through curiosity and thrill-seeking, offering a unique break from traditional academic pursuits.

Finally, the library has served as a platform for exhibitions on human rights, including events focused on vital issues like voting rights. The Head of User Engagement worked with the Louisiana Endowment for the Humanities as well as the Institute of Museum and Library Services to bring programming to the library. In collaboration with the Head of Access Services, they set up, installed, and made space available for these impactful programs. These exhibitions highlight the importance of human rights activism and education, offering community members the chance to reflect on global and local challenges. By displaying powerful stories and facilitating discussions about equality, justice, and activism, the library connects individuals who are passionate about making a difference in the world. Whether through the arts, food, music, or important social causes, these activities create a vibrant and inclusive environment in the library, helping to foster connection and collaboration across diverse interests.

Library of Things

The Library of Things plays a pivotal role in supporting the concept of the third space at Dupré Library.[5] As discussed, the third space concept refers to environments that foster social interactions and collaboration outside of work or home. These spaces are designed to be flexible, inclusive, and comfortable, providing individuals with the resources and environment they need to relax, focus, and connect. The Library of Things broadens the concept of what a library can offer by providing a wide range of nonbook materials that foster both personal and academic exploration, transforming the library into a dynamic and versatile community hub.

Among the items available in the Library of Things are medical models, which serve as valuable tools for nursing students, healthcare professionals, and others interested in medical fields. These models provide hands-on learning opportunities, encouraging interaction and collaboration in a way that traditional textbooks cannot. In a similar way, school supplies such as calculators, engineering supplies, and art materials support students in their academic endeavors. Alongside discipline-specific materials, other items such as projector/laptop stands and presentation remotes can help students with a variety of courses. These educational resources not only break down barriers to learning and access but also introduce students to materials that can enhance their academic pursuits.

In addition to these more traditional items, the Library of Things includes kitchen supplies, such as baking and cooking tools, which allow individuals to cook for themselves or others. This enhances the library's role as a facilitator of connections, turning it into a place where people can share cultural traditions, learn new skills, or simply come together to enjoy a shared meal. The collection also includes board games, offering a fun and engaging way to build connections within the library's community. These games encourage socialization, teamwork, and friendly competition, making Dupré Library a place where people can unwind, relax, and interact while having fun. The inclusion of stuffed animals caters to visitors in need of comfort and relaxation, promoting a sense of joy and emotional well-being in the library.

Perhaps one of the most dynamic aspects of the Library of Things is the wide range of technology available for loan. Webcams, microphones, ring lights, projectors, and projector screens enable individuals and groups to engage in virtual meetings, presentations, creative projects, or even content creation. These tools facilitate collaboration and creative expression, making the library a hub for content creators, educators, and anyone looking to produce digital work. By providing access to these items, Dupré Library supports both personal development and community engagement, creating a space where ideas can be shared, technology can be explored, and connections can be made.

The Head of Research and Access Services oversees the policies for the check-in and check-out of these materials, managing fines and overdue procedures to ensure the smooth functioning of the collection. Meanwhile, the Head of User Engagement promotes and develops materials for the Library of Things through grants and donations, continually enhancing the collection and expanding the library's offerings. All these resources, when combined, enhance Dupré Library's role as a third space—an adaptable, welcoming environment that nurtures learning, creativity, and community.

Closing Thoughts

The library has evolved far beyond its traditional role as a place for books and quiet study by supporting the third space concept and becoming a dynamic, inclusive, and multifaceted environment that promotes relaxation, focus, and connection. Through a range of activities and programs, including stress-relieving events like music jams and ghost hunting, alongside focus-boosting initiatives like peer tutoring, study spaces, and research support, the library creates an environment where students, faculty, and the community can connect, collaborate, and recharge. These programs encourage meaningful interactions, offering individuals opportunities to engage with their passions and interests while also providing the support they need to succeed academically.

The Library of Things exemplifies this third space concept, offering an impressive collection of resources that cater to a diverse range of needs—from medical models and school supplies to technology for content creation and even kitchen tools for shared culinary experiences. By providing access to these materials, the library empowers individuals to explore, create, and collaborate in ways that go beyond the traditional confines of academia. Whether through hands-on learning, group activities, or personal projects, the library serves as a space that adapts to the needs of its community, offering both practical resources and an environment that nurtures personal and collective growth.

Ultimately, the library is much more than just a physical space; it's a third space, a community hub where people can relax, focus, and connect. Whether through leisurely reading, engaging in special interest activities, or accessing resources that support personal and academic development, the library plays an essential role in enriching the lives of those it serves. It remains a cornerstone of the campus and community, continually evolving to meet the needs of its diverse users while fostering a sense of belonging and shared purpose.

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Readers' Advisory
Craig Clark, Col. Ed.

Inclusion as the Norm

The Power of Diverse Book Displays

Lila Denning

Lila Denning is the Acquisitions Coordinator for the seven libraries of the St. Petersburg, Florida, Library System. She has worked in circulation, reference, and programming for children and adults. Beyond her current role in her library, she writes about using book displays to merchandise a library's collection and trains librarians nationwide on passive reader advisory techniques. In addition to her MLIS, Lila has an MA in Religious Studies with a focus on Holocaust Studies and antisemitism. She currently serves as a volunteer coordinator for the Horror Writers Association as well as Public Liaison, co-chair of the Bram Stoker Awards.—*Editor*

Displaying books in libraries is an essential part of providing readers advisory. Effective displays allow patrons to notice and connect with titles in a library's collection without direct interaction with staff. Most of those who enter a library do not ask for help; they search for titles on their own. A book display will reach more patrons than library workers could, especially given all the tasks unrelated to readers advisory that most have assigned to them. Items placed on display are often discovered by a patron who comes in looking for something else entirely. "A book exhibit consisting of a small group of books and a descriptive sign is one of the most effective ways to promote and highlight parts of the fiction collection."[1]

This is true not only of fiction but of all parts of a library's collection. As a marketing tool, displays deliver a way to draw attention to titles that have not received the publicity or attention that bestselling books have. A title that has been in multiple magazine articles or everywhere on social media does not require the help of public libraries through book displays. The reality is that most of those books are checked out with wait lists. Book displays, as smaller, curated collections, are easier to navigate than shelves of titles. They provide a chance to introduce patrons to diverse titles simply as part of a theme or genre without adding any other context while also providing a way to minimize the conflicts that, unfortunately, many library workers are experiencing, while still placing a spotlight on those books. Lynn Lobash of the New York Public Library has stated, "Collection merchandising should get more emphasis. For every one person that approaches a librarian to ask for a suggestion, there are many with whom we will never have a conversation. Displays, staff picks, shelf talkers, even face outs can serve as recommendations for these patrons."[2] She recommends that library workers start with their collection as they build a display, rather than with a theme or props. This approach will focus attention on the library's collection as the primary driver for a display. Beginning with the titles in a collection that do not have long wait lists or have not been checked out recently is often a better starting point than selecting a theme and rigidly attempting to match titles to that theme. Unfortunately, titles that have not received the attention they deserve

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from book journals and reviewers are often from diverse authors. Every library's collection includes titles by a wide variety of authors, and all the books in the collection should potentially be included on a display.

Reminding library workers of the need to include diverse books in their passive readers advisory efforts helps to reinforce the need to broaden knowledge of a library's collection and to include titles that are outside of the very popular books that are constantly mentioned. Readers Advisory expert Becky Spratford states that "When you go out of your way to make sure as many identities and experiences are reflected in every single display or list you make, you are 1. showing members of your community that their identity matters and 2. you are providing great titles which will allow your readers to enjoy a book that might take them to a new place or allow them to see something they thought they knew from a new perspective."[3] Highlighting the titles that diverse authors have produced, with diverse characters, and which present a window into another's experience is an important task for libraries. Programs, marketing efforts, and passive readers advisory should be used toward that effort. It's important to recognize that using multiple approaches will allow library workers to get those books in the hands of patrons who might not otherwise check out a particular title. These unmediated interactions with a book allow for someone to take a chance on a new-to-them author without hearing anything from staff that could create a barrier to them taking that chance.

For those library workers who work in areas where activist pressure adds anxiety to collection promotional efforts, a regular practice of adding great books by diverse authors to every display is a way to promote those titles among others just as great reads. This creates an opportunity by which "we can allow patrons to learn from diverse characters, authors, and settings while also finding commonalities in human experiences. They might learn to see their own experiences through a different lens. Similarly, books can disrupt and challenge ideas about diversity through multifaceted and intersecting identities, settings, cultural contexts, and histories."[4] This opening of their perspective does not require a sign, which focuses on the authors' identity. Reading the books will create a chance to learn and recognize shared experiences. Spratford dryly notes that using words that include terms associated with diversity, equity, and inclusion in a sign could lead to negative comments when the same display without those words would generate none of those comments.[5] Libraries who face scrutiny and outrage due to current political trends can focus on the individual titles and promoting them as potential great reads, potentially interrupting whatever narrative a reader had about diverse titles by allowing those readers to discover them through the low pressure and more subtle tactic of inclusion in a book display.

Diverse books have always existed, and library staff can be the path by which patrons discover them. "Windows, mirrors, and doors are still important and will always be important, but it's time to take the next step and recognize that books written by diverse authors, featuring diverse characters, are for anyone, for everyone, all the time" is how Robin Bradford, collection development librarian at Pierce County (Wash.) Library System states it.[6] Celebrating cultural heritage and history months such as Black History Month or Women's History Month are important, but the titles that would be promoted then deserve year-round attention. They should not be suggested to only Black or female patrons. A great book is for anyone. The next step after including a regular display that celebrates heritage months is to include them in every display and list.

"Diversity is not a genre" is a phrase that has been repeated over and over. In his essay "Being Indian Is Not a Superpower," author Stephen Graham Jones notes that "Once I started publishing novels, I quickly found that, at book events, I'd get questions that focused on Indian culture and life and history and 'tragedy' (always the tragedy) more than on the story itself."[7] Jones reminds

librarians that focusing on identity alone may cause the story an author is telling to get lost behind preconceptions of what that identity means. There are great stories in libraries, including many by authors who are from marginalized communities. A book display with mysteries by a wide variety of authors with an expansive range of experiences will broaden the choices for those readers familiar with the genre, introducing them to mysteries they missed. Looking away from identity alone also encourages the inclusion of a wider variety of stories from every community. Contemporary poet Scott Woods has created lists of picture books, ignoring the common themes of boycotts, buses, and basketball and are instead about black children doing what "all children do: play, make up stories, learn life lessons, and dream."[8] This can also be carried forth into adult titles as diverse characters can fall in love, solve mysteries, have adventures, and live complex lives in books.

There are other concerns about focusing on the diversity over the books. For example, Dr Elizabeth Hendrick points out: "Essentially, if we consciously begin crafting a special collection for queer kids but we only suggest the books in that collection to the kids who specifically request books about queer kids, and don't offer them as valid reading material to kids who have not made inquiries about books with queer kids, we're participating in the process of marginalization, indirectly or not. For queerness to become an open and accepted part of society it must be normalized, and this includes adding books that have queer protagonists to your regular slate of books that you would recommend to any kid."[9] To use the example mentioned above, mysteries by queer authors should be recommended to all mystery fans through displays and other passive readers advisory tools, not only to those seeking books by queer authors or with queer characters. Queer people are part of everyday life, readers' local communities, as well as the wider world. Those books should be recommended to any reader, even outside of June.

This marginalization creates a separation between books by diverse authors and others. It centers a white, straight, Christian perspective as what is in "normal" books while making diverse books more of a niche interest, to be read by members of those communities and on special months. These books are not interesting or valuable because their authors and characters are diverse.[10] They need to be added to the displays, lists, and suggestions that are made to readers interested in a particular genre or topic. Moving who is centered in the culture of reading that is created in a library, allowing those who are marginalized to take center stage, even if a sign does not declare their identity, is actively promoting a culture of anti-racism. This active promotion does not require signage identifying the author's characteristics to be actively anti-racist. These books are books that should be treated as titles to be potentially enjoyed by any reader. Deliberately developing a regular practice of adding diverse titles to all displays and lists both increase staff knowledge of those titles, creating more opportunities for them to be included in staff recommendations.

A feature like staff recommendations is a perfect place for a library to introduce patrons to diverse books. This is especially true if the staff member has built up trust as someone who regularly makes great suggestions in a particular genre or subject area. When they recommend a book, it will carry additional weight with patrons who share their tastes. Staff should be encouraged to broaden their own reading and include titles that are not widely promoted or discussed to make that display a genuine area of discovery for readers. Short descriptions that identify why that staff member enjoyed a particular title could draw in a reader with similar interests. Diverse titles regularly appearing in places like staff recommendations creates a culture of reading that has depth and breadth. If a library staff reads diversely and broadly, they will make diverse suggestions to patrons through active and passive readers advisory efforts. The American Library Association (ALA) has an interpretation of the Library Bill of Rights on their website under the title "Equity, Diversity, Inclusion, and Belonging: An Interpretation of the Library Bill of Rights." About belonging, ALA states:

"Libraries do not talk about this aspect of the ALA Library Bill of Rights enough. Including a wide variety of books in our book displays as part of everyday practice will help to encourage patrons and staff to see books by diverse authors as part of the collection and part of the books that we recommend."[11] Belonging is a message that libraries can send both directly through inclusion in their mission statements and indirectly through the titles they promote. Through books, readers can see themselves and their community as well as see others as having common thoughts, feelings, and experiences.

Although activists may still pressure library boards and stakeholders to remove particular titles that have been targeted by organizations intent on purging collections of any book they deem objectionable, libraries can promote reading broadly and diversely by using book displays to promote those titles to their patrons as part of a rich collection. Libraries should be intent on encouraging everyone to feel as if they both belong in the library and have an opportunity to see other experiences in the books they read. Focusing on regular inclusion in all collection promotion efforts, even without signs indicating that a display is inclusive or devoted to diversity, can allow diverse books to reach an audience that would not seek them out on their own. This creates an opportunity for library workers, in regions where pressure from local politicians and outside interest groups occurs, to put diverse books in the spotlight in a way that minimizes the chance they could be targeted.

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Reference Services and Instruction
Rebecca Graff, Col. Ed.

Tracking Instructional Themes at the Reference Desk

Jillian Collier

Introduction

Academic libraries play a vital role in supporting student learning by offering both structured instruction and point-of-need research assistance. While formal library instruction sessions are often planned well in advance, reference services provide a more spontaneous and personalized way for students to develop essential research skills. These interactions, whether brief or in-depth, can contribute to student learning outcomes (SLOs) related to information literacy. As libraries increasingly seek to demonstrate their impact on student success, assessing the instructional value of reference services is an opportunity to do so. This case study describes one library's approach to reference service assessment by aligning data collection with SLOs, offering a model for how academic libraries can better capture and communicate the instructional value of their reference services.

Literature Review

In 2003, librarians at the University of Illinois-Springfield published an experiment assessing reference interactions as a teaching and learning activity. They observed, "the context of reference transactions usually differs from classroom library or bibliographic instruction."[1] They also described differences between planned instruction sessions and point-of-need instruction at the desk. Classroom instruction is planned with specific outcomes in mind, but reference questions are more unpredictable, and a librarian typically does not have a prepared response. While the preparation may be different, the skills being addressed are remarkably similar across both modes of instruction.

In 2019, VanScoy introduced a pedagogical framework for analyzing point-of-need information literacy instruction, distinguishing among conceptual knowledge, understanding principles, procedural knowledge, and knowing how to perform tasks. Her analysis of reference transcripts shows that most instruction focuses on procedural knowledge, such as search strategies or citation formatting.[2] These procedures and skillsets are covered extensively in classroom instruction sessions. If what students are learning in a reference interaction is so similar to what is covered in an instruction lesson, we should be tracking it as part of our overall instructional program and including these data in assessment.

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Stoddart and Hendrix (2017) offer a potential solution by redesigning intake forms to capture learning-related activities at the reference desk.[3] Current (2023) extends this conversation by presenting a systematic approach to tracking SLOs during reference interactions at the University of Wisconsin–La Crosse. Using a tagging system, librarians associated each interaction with one or more of ten departmental SLOs.[4] The study reveals consistent patterns in which learning outcomes are addressed and correlations between interaction length and instructional depth. Together, these studies underscore the evolving role of the reference desk in academic libraries as a site of meaningful learning. By aligning with departmental and institutional outcomes, employing pedagogical frameworks, and embracing assessment, libraries can more effectively demonstrate their value and enhance student success.

Case Study

Georgia Gwinnett College (GGC) is a four-year, public college located in Lawrenceville, Georgia. In fall 2024, GGC enrolled more than 12,000 students, about 76% of whom were from Gwinnett County. Established in 2005, and initially accredited in 2009, the college now offers more than twenty majors with flexible scheduling and an average class size of eighteen students. GGC has also been recognized as one of the most ethnically diverse Southern regional colleges.[5] Kaufman Library is located at the center of campus, and the reference desk is directly adjacent to our circulation desk on the first floor of the building. During the library's regular schedule, the reference desk is staffed by a librarian from 9:30 am to 8:30 pm, except on Fridays, when we close at 6:00 pm. Our reference desk is consistently utilized by our students.

Kaufman Library onboarded their first Assessment Librarian in the summer of 2024, along with a new Head of Research Services, with the clear goal of working together to improve the assessment of library instruction and reference services. At that time, the existing tracking system was working relatively well to count the number and length (in minutes) of reference interactions. We track more than 500 reference interactions per semester, which averages out to approximately twenty-five interactions per week. Most of the interactions were what we call "Quick Reference Questions," meaning the interaction lasted five or fewer minutes. We wanted to revise the tracking form to include a way for librarians to capture the instructional topics and SLOs being addressed during each reference interaction. One goal was to enhance our assessment methodology by moving away from simple tallies and counting minutes spent on a transaction. The larger goal was to capture more substantive data to give us insight into the learning experiences of students at our reference desk.

Our library uses LibInsight, a Springshare product, to track and analyze data on interactions at our circulation and reference desks. This allows us to edit the tracking form at any time. The form already allowed librarians to record the length of each interaction and the method (e.g., walk-up, phone, online chat). There was also a section for librarians to record general information about the type of interaction. After discussing it with all the librarians who work at the reference desk, we revised this section of the tracking form to include instructional topics as shown in Figure 1. The left column shows the options already in use, and the right column shows the specific instructional topics that we added. This list was formulated by brainstorming the topics that commonly come up at the desk for point-of-need instruction and consulting our library's SLOs. We mapped each instructional topic onto our library SLOs to show that students are engaged in relevant learning experiences while asking questions at the reference desk. The library's SLOs are:

- Students will use library resources to find and select appropriate information sources.
- Students will identify information needs relevant to an assignment or research topic.

- Students will identify effective keywords for searching.
- Students will evaluate source types, including scholarly sources, popular sources, and AI-generated content.
- Students will demonstrate an effective search strategy.

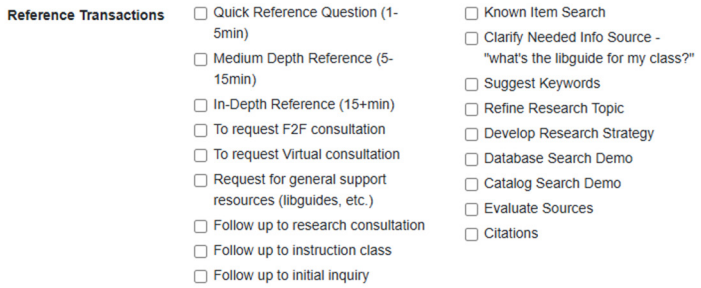

Figure 1. Reference transactions section of the LibInsight tracking form.

As shown in Figure 1, both columns were retained as part of the form. The idea was for librarians to be able to capture as many distinct types of interactions as possible. This form is open to further revisions as we continue to enhance our assessment methods. Training was provided to all librarians who work at the reference desk to establish consensus about how to categorize different types of reference interactions. For example, some reference interactions may include multiple questions on multiple topics. So, we decided to use the "select all that apply" method. This makes the data analysis more complex, but we feel that it is important to capture all the learning outcomes being addressed in each interaction.

After collecting data with the revised tracking form, we can see which topics and SLOs are most prevalent in reference interactions. LibInsight provides data exports as an Excel spreadsheet, which allows for various calculations and analysis. For spring semester 2025, the most common topics were known item searching, suggesting keywords, developing research strategy, and database searching. Each of these topics are mapped to one or more of the library SLOs. This data allows us to quantify the learning experience that we provide to our students at the reference desk, which helps us tell the story of how reference services contribute to our library instruction program and overall student success.

Conclusion

The implementation of this new and improved tracking system at Kaufman Library has provided valuable insights into the instructional impact of reference desk interactions. By mapping common reference topics to established SLOs, the library has created a framework for assessing and communicating the educational value of reference services. The data collected during spring 2025 highlights the prevalence of key research skills being addressed, reinforcing the library's role as an active contributor to student learning. Moving forward, continued data collection and analysis will support ongoing improvements, ensuring that reference services remain a vital component of the academic library. Future research should explore how these approaches can be scaled, standardized, and integrated across diverse library contexts.

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Feature

A Tale of Two Audits

Enhancing Diversity in Academic Library Collections

Jennifer Martin, Angeline Prichard, and Erin Weber

Abstract

This paper discusses two collection diversity audit projects undertaken by a mid-size university library. For the first project, we evaluated our leisure collection based on the characteristics of the main characters in the books, with the goal of adapting the process for our main collections. For the second project, librarians created a flexible spreadsheet that was used to track diversity metrics for new book orders. This article discusses why the first project did not work well for us, but taught us some valuable lessons about conducting a collection diversity audit, and how the second project better matched our needs.

Introduction

While many academic libraries favor improving the diversity of thought and perspectives in their book collections, there is far less synchronicity in how best to accomplish that goal. This article examines two specific diversity audit projects undertaken by the librarians at a university library in pursuit of a more diverse collection. Success—unfortunately, but perhaps not unexpectedly— varied.

Salisbury University (SU), located in Maryland, is a mid-size public, regional, comprehensive university that serves approximately 7,000 primarily undergraduate students. It is one of twelve universities comprising the University System of Maryland (USM). Those universities, plus an additional five institutions, make up the USMAI library consortium. Our university consistently prioritizes diversity and inclusion in special projects and daily work. The "Salisbury Seven," pledge statements that guide institutional strategic planning, include "a continual commitment to inclusion, diversity, opportunity and equity."[1] SU Libraries also operate under our own Diversity and Inclusion Plan (https://www.salisbury.edu/libraries/about/plans/diversity-inclusion-plan.aspx), which includes a goal of diversifying collections.

Project 1 targeted our leisure collection as a smaller, more manageable subset of the circulating collection. Ten distinct categories regarding identity were considered for each title reviewed, and fourteen members of the libraries' staff participated; all in all, it was quite an undertaking. Project 2, born out of dissatisfaction with the results of the first audit, was designed to be more targeted and useful for individual liaison areas. We created a spreadsheet with a bank of identities from which auditors could select categories relevant to their specific liaison disciplines and apply them to titles as they were purchased, rather than to existing collections. Although neither approach was

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perfect, we found more value in the results of the second project, owing in no small part to the more targeted, localized approach.

Literature Review

A literature review, conducted prior to Project 1 in 2020, was used to inform our choices on that project. An update to the review was conducted in 2024 and covered materials published since the prior review, focusing only on academic libraries. The questions and methods discussed remained broadly the same between the two review periods: What goals can diversity audits serve, and what audit methods are most effective in different contexts?

Twenty-one case studies, one literature review, and one working group report were identified that dealt with conducting collection diversity audits. The literature review and eighteen of the case studies focused on academic libraries. The remaining three case studies focused on public or school libraries, and the working group report included recommendations for multiple types of libraries. Of the eighteen academic-focused case studies, eleven looked at print monographs, three at periodicals, one at all monograph formats, one at films, one at play scripts, and one at all recently purchased materials. Table 1 includes a summary of which papers fell into each category.

A wide variety of possible methods of conducting a diversity audit were identified in the literature:

- List checking: Compare library holdings against a bibliography of suggested titles, compiled by a vendor or other outside agency, against a list of award-winning books or against a self-compiled list.
- Creator analysis: Research creator identities and compare holdings by diverse creators against total holdings.
- Content analysis: Using a rubric, assign diversity codes to items based on their content and evaluate diverse holdings against total holdings.
- Order analysis: Using a rubric, assign diversity codes to items as they are ordered and evaluate diverse orders against total orders.
- Peer comparison: Compare library holdings against the holdings of peer institutions.
- Circulation statistics: Examine usage by patron group or examine what materials are being used.
- Subject analysis: Compare holdings with a given set of subject headings against total holdings.
- Citation analysis: Examine theses, etc., to see whether the library holds cited material (often periodicals focused).
- White's Brief Test of Collection Strength: A subject-based variant of list checking, which also assigns a Conspectus level.
- ILL analysis: Review ILL patterns to see where holdings might be weak.
- Search analysis: Review search terms to see what subjects or topics patrons are looking for.
- Patron research: Conduct focus groups, surveys, or other user studies to determine if the collection is meeting patrons' needs around diversity.
- Vendor audit: Contract out to specific vendors who will conduct an audit using their own criteria.

The literature also identified a wide number of possible axes of diversity to consider:

- Race and ethnicity: Indigenous Peoples/Native American/First Nations; African American; Asian American; Latinx; Asian; African; Middle Eastern; Pacific Islander; biracial; etc.
- Gender: Women, trans, nonbinary, intersex, etc.

- Sexual orientation/sexuality: Gay, lesbian, bisexual, pansexual, asexual, etc.
- Culture and national origin, including multiculturalism
- Religion: Atheist, Buddhist, Christian, Hindu, Jewish, Muslim, Wiccan, etc.
- Health and disability: Allergies, serious physical illness, chronic illness, impaired hearing or sight, loss of limbs, limited mobility, use of aids, neurodivergence, mental illness, learning disorders, etc.
- Socioeconomic status/class
- Immigrant and refugee status
- Intersectionality
- Type of publisher, e.g., small publishers that don't usually sell to libraries
- Politics
- Age
- Body shape
- Language
- Family structures: Same-sex parents, interracial, blended, adoption, foster care, etc.
- Veteran status
- Incarceration
- #OwnVoices: A shorthand denoting authors who share at least one identity with a character or subject in their work
- Unusual forms of publication

Table 1. Summary of Materials Reviewed

Citation	Type of Literature	Type of Library	Materials Reviewed (Academic Case Studies Only)	Type of Audit
Aloziem and Parkhurst-Strout (2021)[2]	Case study (workshop presentation)	Public or school	NA	Content analysis
Bradley-Ridout et al. (2023)[3]	Case study	Academic	Print monographs	List checking (self-compiled)
Calderon (2024)[4]	Case study	Academic	Print monographs	Creator analysis
Carmack (2021)[5]	Working group report	Multiple types	NA	List checking (award winners); creator analysis; order analysis; vendor audit
Ciszek and Young (2010)[6]	Literature review	Academic	NA	List checking (suggested titles and self-compiled); order analysis; peer comparison; circulation statistics; subject analysis; search analysis; patron research
Emerson and Lehman (2022)[7]	Case study	Academic	Print monographs	Creator analysis
Graziano (2016)[8]	Case study	Academic	Periodicals	Citation analysis
Herrera (2016)[9]	Case study	Academic	Print monographs	Circulation statistics
Jensen (2017)[10] and Jensen (2017)[11]	Case study	Public or school	NA	Creator analysis; order analysis; content analysis
Kristick (2019)[12]	Case study	Academic	Print monographs	List checking (award winners); peer comparison

Citation	Type of Literature	Type of Library	Materials Reviewed (Academic Case Studies Only)	Type of Audit
LaFond et al. (2000)[13]	Case study	Academic	Periodicals	List checking (suggested titles)
Manuell et al. (2019)[14]	Case study	Academic	Print monographs	Creator analysis
Monroe-Gulick and Morris (2023)[15]	Case study	Academic	All monograph formats	List checking (award winners)
Mortensen (2019)[16]	Case study	Public or school	NA	Creator analysis; content analysis
Phelps (2021)[17]	Case study	Academic	Print monographs	List checking (suggested titles); peer comparison; White's Brief Test of Collection Strength
Proctor (2020)[18]	Case study	Academic	Print monographs	List checking (award winners); peer comparison
Shaffer (2013)[19]	Case study	Academic	Print monographs	Subject analysis
Shotick (2024)[20]	Case study	Academic	Print monographs	Creator analysis
Springmier et al. (2024)[21]	Case study	Academic	All recently purchased materials	Creator analysis; content analysis
Stone (2020)[22]	Case study	Academic	Play scripts	Creator analysis
Tillay and Chapman (2019)[23]	Case study	Academic	Film	Creator analysis
University of West Florida, University Libraries (2021)[24]	Case study	Academic	Print monographs	List checking (suggested titles and award winners); content analysis; order analysis; peer comparison; circulation statistics; citation analysis; White's Brief Test of Collection Strength; ILL analysis
Vega García (2000)[25]	Case study	Academic	Periodicals	List checking (suggested titles)

NA, not applicable.

One theme that shows up across studies concerns scope: should an audit evaluate an entire existing collection, aim for a representative sample of a collection, or assess only new acquisitions? Whole-collection audits provide a baseline measure of representation across decades of collecting,[15,19] whereas audits of recent purchases serve as a forward-looking barometer of whether current practices are building inclusivity.[21] For example, Springmier et al.[21] framed their analysis in terms of course alignment and future curricular support, whereas Monroe-Gulick and Morris[15] and Phelps[17] probed whether existing holdings, including at the consortial level, adequately reflect underrepresented voices. The former assumes an ongoing commitment to diversity, equity, and inclusion work; the latter highlights one-time corrective action. Our own work found this distinction especially resonant, since one challenge we confronted was defining whether our audit's intent was more corrective or forward-thinking. The two projects we conducted straddled this distinction.

As mentioned above, the literature identifies numerous methodological approaches to conducting diversity audits in academic libraries, each with specific strengths and limitations. Below we will discuss in further detail the most commonly used methods.

List Checking

By far the most common methodological approach used by academic libraries is some form of list checking, where the library's holdings are compared to a list of books to determine the percentage of the listed books held. The literature shows that the lists used for such projects tend to fall into three broad categories, which we have termed "suggested titles," "award-winners," and "self-compiled." "Suggested title" lists are generally some sort of bibliography compiled by either experts in a field or by publishers, often with the intended goal of identifying either top titles or all titles in a given area, such as Resources for College Libraries (RCL) core titles or the Alternative Press Index. "Award-winner" lists are the list of books that have won a given award, such as the Stonewall Book Award or the Latino Book Awards. "Self-compiled" lists are compiled by the people doing the audit, such as by drawing on local expertise or conducting literature reviews for recommendations. Generally speaking, the goal with list checking is to find that the library holds a certain percentage of the books on the lists, with the goal percentage chosen by the library.

Ciszek and Young[6] described list checking as a "foundational" form of quantitative assessment, but also emphasized drawbacks: lists are rarely current, are often limited to certain categories like race and gender, and at times are arbitrary or poorly standardized. An advantage of list checking is that it inherently requires a finite number of titles be checked (only items on the list), which can feel less overwhelming than other forms of audits where the auditors must decide what sample size is sufficient. List checking also has a convenient, built-in method of improving the collection's diversity if the library falls short of their goal: the desired number of titles can be ordered from among the non-held titles on the list.

In an example of early diversity audit work, Vega García[25] used lists of African American and Latino periodicals to expose disparities, showing strong support for Black studies but significant neglect of Latino scholarship. More recent list-based audits[17,24] compared holdings to core lists such as RCL, but acknowledged limitations including disciplinary bias (heavier in the humanities), the subjectivity of deciding what percentage of coverage is "enough," and the arbitrariness introduced by having to choose which lists to include and exclude.

The three categories of lists also each introduce their own complexities to such audits.

For "suggested titles" audits, identifying adequate lists can be difficult because lists for the desired topic may not exist or may be out of date[6]: for instance, when Phelps[17] was conducting their audit in 2018 or later (the precise timeframe is not specified in the paper), they ended up relying on three lists that were last updated in 1995, 1999, and 2013, respectively.

"Award-winner" audits[5,12,15] assume that award-winning titles indicate both quality and representation; yet several authors questioned this assumption, noting that award criteria reflect subjective judgments and may not align with local curricular needs. Still, some approaches implicitly equated equity with achieving 100% ownership of award winners, a problematic assumption when awards cover genres like popular fiction that may not align with an academic mission.

"Self-compiled" lists allow libraries the flexibility to create a list that is up-to-date and fits the library's needs, but negates most of the main benefits of list checking, namely the time savings of using a pre-existing list and the comfort of being able to draw on the presumed expertise and authority of the list creators rather than having to make the decisions yourself. For example, Bradley-Ridout et al.[3] built what they named a "reverse diversity audit," which was a self-compiled list related to their dermatology collection for titles covering diverse skin tones. This method was more targeted and efficient than other forms of list checking but sacrificed comparability

across institutions. Self-compiled lists seem to be primarily useful for niche content areas or mini collections tailored explicitly to a local population or academic discipline.

Peer Comparison

Another relatively common audit method used by academic libraries is peer comparison, where the holdings of the library are compared to holdings of selected peer libraries. Peer comparison can be used to show where a library's collection is stronger or weaker than their peers' collections,[6,17] but it appears that it is difficult to draw any actionable conclusions from peer comparison, given that none of the case studies that conducted peer comparison discussed taking any action based on that assessment. Additionally, using Library of Congress Classification to define which parts of the collection are being compared is complicated for diversity-related topics given that such topics are generally multidisciplinary and therefore scattered across the classification ranges.[6] Peer comparison, then, appears most powerful for advocacy (e.g., justifying budgets, persuading administrators) but limited for nuanced diversity evaluation.

Content Analysis

Content analysis audits are particularly popular in public and school libraries due to their high suitability for fictional titles; all three of the public or school library case studies used some form of content analysis, whereas only two of the eighteen academic libraries reported using content analysis. In content analysis, either the whole collection or a subset of the collection is evaluated based on a rubric that looks at the contents of the materials (as opposed to the characteristics of the author). The results from the rubric are then tallied to determine what percentage of the collection meets the rubric criteria. For fictional titles, the most common form of rubric looks at the identity of the protagonist or main character(s). Jensen's YA audit, based in a public library, remains a touchstone: she tallied author and character identities across 700 YA books, benchmarking against census data and local demographics.[10,11] Her work showed the feasibility of such audits on a small scale.

In an academic setting, Springmier et al. adopted a content-based audit but framed it within a larger organizational learning process. Their rubric asked a series of yes/no questions on the subject of the book such as "Is the book about non-Western or Global South issues or topics?" or "Is the book's perspective cross-cultural?" and on the methodology used within the book such as "Does the book use anti-racist or restorative methodology?"[21] The University of West Florida, University Libraries assigned codes such as "African/African American," "LGBTQ+/Sexuality," or "Poverty/Homelessness/Socioeconomic Status" based on the "main topic(s), theme(s), location(s), character(s) etc." of their books.[24]

Content analysis audits are highly customizable, allowing libraries to focus in on the specific forms of diversity they want to evaluate without being dependent on whether literature or bibliographies exist on the topic, but they are very labor intensive to both set up and conduct because the rubric must be developed and then each book must be individually scored. Content analyses can also provide clear diversity goals, such as having a certain percentage of titles fit in a given category. One thing that content analysis audits generally don't evaluate, though, is the quality or diversity of the diverse representation itself: representation may lean into stereotypes—including negative stereotypes—or be limited to popular topics;[10,11] for instance, as the University of West Florida, University Libraries[24] notes, "not all "Jewish" books should be about the Holocaust [and] not all "African American" books should be about slavery."[24] Another potential drawback is that if multiple people are participating in the audit, inconsistency in the application of the codes can be a barrier to

accurate results, with normal inter-coder differences amplified by the inherent subjectivity of what falls under many categories.[6,24]

Creator Analysis

Another rubric-based audit method is creator analysis. Like content analyses, books are scored on the rubric and then percentages are calculated; however, instead of the content of the book being evaluated for diverse perspectives or characters, the identities of the author(s) are evaluated. Frequently, the libraries using this audit method wanted to have the demographic spread of their creators match either local or national demographics[22]; however, some libraries wanted the data as a base point to see if future collecting was more diverse.[20] As with content analysis, creator analysis audits are highly customizable but very labor intensive. Researching authors' race, gender, or sexuality is time-intensive, often ambiguous, and can replicate the biases it seeks to challenge. Many studies stressed the ethical risks of "assigning" identities without clear self-identification, while also acknowledging that ignoring identity data reproduces invisibility.[7] Still, creator analysis offered valuable insights: Stone traced significant gains in representation of playwrights of color and female playwrights, even if parity remains elusive.[22] Tillay and Chapman demonstrated how metadata harvesting and scripting could automate diversity checks (first for women directors, but adaptable to other axes).[23] Regardless of method, study authors consistently cautioned that findings depend on how "diversity" is defined and on who has the authority to label creators.

Order Analysis

While the majority of analyses are run against the library's existing collections, some audits look at newly purchased materials instead of the existing collections. This sort of analysis most often involves content analysis and/or creator analysis. Order audits are often intended to allow libraries to track whether their purchasing is getting more diverse over time (see, for example, Jensen). Ciszek and Young[6] described assigning "diversity codes" to order records, but they found data unreliable due to inconsistent application by different selectors.[6] They concluded the method could only work with substantial training and shared standards. Jensen suggested auditing every order against the same rubrics used for shelf audits to create an ongoing, rather than retrospective, accountability mechanism.[10,11] Carmack[5] emphasized order review as an opportunity to ask targeted questions—about authorship, portrayals, and subject coverage—at the moment of selecting materials.[5] The University of West Florida University Libraries piloted multi-year order audits using diversity codes but found the process subjective and burdensome.[24] The consensus across these projects is that order analysis can indeed make diversity intentional, but only if grounded in clear, consistently applied definitions—otherwise, its results are misleading.

Conclusions from the Literature

Taken together, this literature demonstrates both the flexibility and challenges of collection diversity audits. Each method provides insight, but none is universally adequate. A recurring caution, emphasized by Ciszek and Young[6] and echoed across many later audits, is that libraries must clearly articulate their working definition of diversity at the outset. Without this, audits risk being misaligned with institutional goals, too narrow in scope, or uninterpretable. What emerges most strongly from the literature is that diversity audits are not plug-and-play tools: they require institutions to define their goals—diagnostic, prospective, advocacy-driven, or accountability-based—before determining the method. Our projects build on these lessons. The literature illustrates the risk of attempting to assess diversity without a clearly established purpose, a

challenge we ourselves encountered. In particular, we were struck by how often studies noted the mismatch between method and goal: award-based audits assuming completeness equals equity, or creator analyses constrained by the data available. These insights informed our approach and particularly our recognition that goal-setting, rather than methodological selection alone, is foundational for effective auditing.

Project 1: Leisure Collection Audit

In 2016, SU Libraries established a committee whose primary focus was on diversity, equity, and inclusion-related issues. As part of its initial work, the committee created a three-year plan, broken into three main sections: collections, support for patrons, and supporting staff. While the collections goals included promoting diverse titles in our collection via exhibits, events, and the like, analyzing the diversity of our existing collections was not included due to the daunting scale of such a project. The idea of doing a diversity audit continued to pop up for the committee, the collection development team, and the librarian liaisons for several years.

In 2021, the collection development team decided that we would conduct an exploratory audit of the leisure collection using content analysis as described by Jensen.[10,11] Content analysis, as mentioned above, utilizes a rubric to assign diversity codes based on content to titles in order to evaluate diverse holdings against total holdings. This method was chosen because we wanted to focus on the diversity of the content of our existing collections. An author-focused audit does not evaluate this; a diversity of voices does not necessarily equate to diversity of content. We also felt that list checking and peer comparison methods were not comprehensive enough and, particularly for peer comparison, too susceptible to societal biases to be a trustworthy metric. While those methods can tell you if you have the top content for a given dimension, they fall short in assessing how much other content you have and how the collection is balanced. These approaches also tend to focus on only one dimension of diversity, limiting their use for our desired multifaceted assessment.

After the initial meeting, a call went out to the entire library staff for volunteers to analyze the leisure collection. At the time, the leisure collection numbered 655 titles. The title list was randomized so that if not everyone was able to complete their work, we would still have a representative sample analyzed. Fifty titles were assigned to each participant. The volunteers collectively determined the categories for the rubric, which were then laid out in a spreadsheet (see Figures 1 and 2). Though most categories were broken down further into specific examples, the larger categories decided on were race/ethnicity, sexual orientation, gender, disability, immigrant status, body type, national origin, religion, age, #ownvoices, and space for additional comments. Although we understood we could not be exhaustive in our categories, we wanted to be as exhaustive as feasible in our evaluation. Categories were chosen based on those which were felt to be most commonly discussed in the literature and discourse as being of concern for diversity.

Each participant was allowed complete control over how they sought out the information for their titles. Many participants used multiple avenues, such as book review sites like Goodreads, promotional materials like book summaries and jacket information, interviews of the author, publisher websites, Google searches (book title AND “LGBTQ,” for example), examining the physical book, and social media. Most participants found that the majority of the work could be done on their office computer without the physical book in hand. Ultimately, 487 books (74% of the collection) were reviewed.

After the first stage was completed, participants were also asked to review the list to identify any books they personally had read and fill out the rubric for those titles. Our intention was to see how

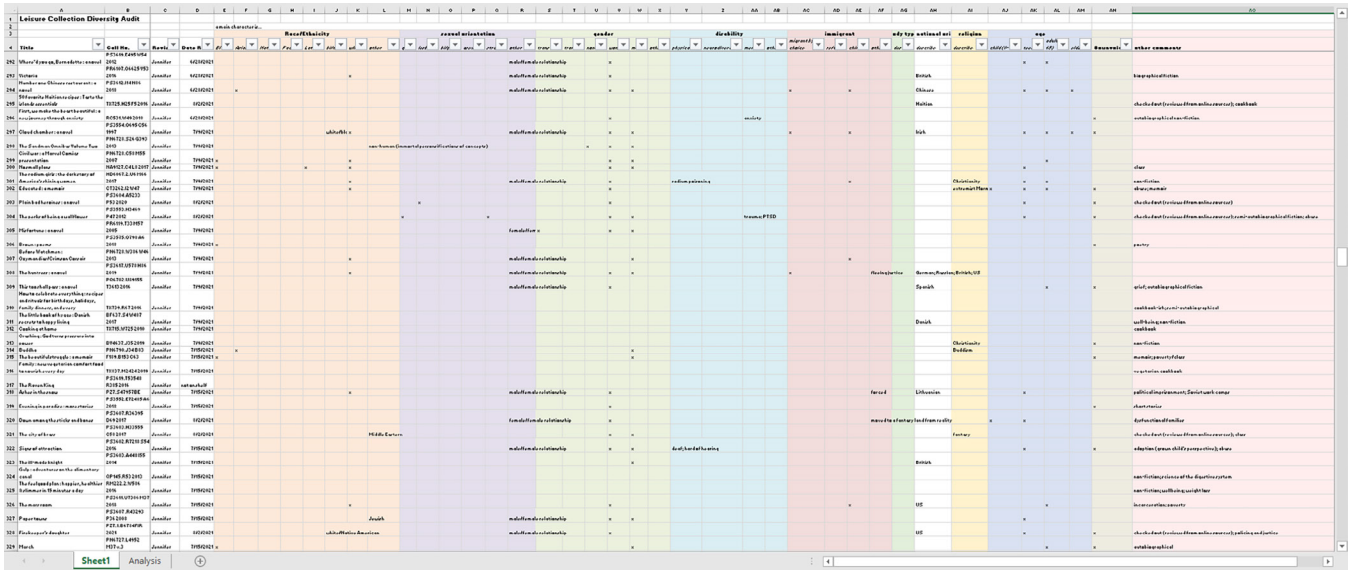

Figure 1. All of the columns of the leisure audit rubric.

	A	B	AD	AE	AF	AG	AH	AI	AJ	AK	
1	**Leisure Collection Diversity Audit**										
2											
3			**immigrant**			**body type**	**national origin**	**religion**		**age**	
4	**Title**	**Call No.**	*refugee*	*child of ir*	*other*	*describe*	*describe*	*describe*	*child (0-12)*	*teen & yc*	*adul 65)*
296	First, we make the beast beautiful : a new journey through anxiety	RC531.W49 2018									
297	Cloud chamber : a novel	PS3554.O695 C56 1997		x			Irish			x	x
298	The Sandman Omnibus Volume Two	PN6728.S26 G393 2013									
299	Civil war : a Marvel Comics presentation	PN6728.C58 M55 2007									x
300	No small plans	NA9127.C4 L8 2017								x	
301	The radium girls : the dark story of America's shining women	HD6067.2.U6 M66 2017		x				Christianity		x	x
302	Educated : a memoir	CT3262.I2 W47 2018						extremist Mormc	x	x	x
303	Plain bad heroines : a novel	PS3604.A5233 P53 2020								x	
		PS3553.H3469 P47									

Figure 2. A small portion of the filled-out leisure audit rubric.

accurate the audit methodology and results were when compared with the review of someone already familiar with a title. However, too few books were reviewed at this stage to allow for any sort of validation.

After the reviews were completed, the Collection Development Coordinator analyzed the results, compiling the numbers for the predefined categories and analyzing the responses in the "other" and free response categories. The Collection Development Coordinator then assembled a report with a summary of the process and graphical and table presentations of the numerical results. A copy of the report is available on request.

Project 2: Diversity Purchasing Spreadsheet

The second project, titled the Diversity Purchasing Spreadsheet (hereafter referred to as The Spreadsheet), began after the completion of the Leisure Collection Audit, as library liaisons sought to explore diversity and inclusion concerns within their liaison collection development practices. The long-term goal was to apply lessons learned from the initial Leisure Collection Audit to implement incremental changes, ultimately contributing to the development of a more diverse and inclusive library collection.

We created a master list of diversity and inclusion categories and used an Excel macro to allow for multiple selections within each category. The Spreadsheet was deliberately designed for future sharing with other liaisons, providing data that were both sufficiently detailed for analyzing trends and flexible enough to support varied applications across liaison disciplines. The master list encompassed eight diversity categories, although not all of them were used in the first iteration of this project. Unlike Project 1, which attempted a comprehensive scope, The Spreadsheet emphasized a more targeted approach intended to be focused and sustainable for all librarian liaisons, thus making the data more feasible to analyze, fitting it within existing collection development workflows, and making more corrective action possible.

In this initial pilot, The Spreadsheet was used to track author diversity in liaison book purchases made over the 2023–24 academic year, focusing on five key areas: race/ethnicity, gender, sexual orientation, disability status, and intersectionality in STEM. The race/ethnicity and gender categories were analyzed at a "micro" level, assigning specific categorizations of race or ethnicity. For example, the race/ethnicity category included tags for African, Black/African American, East Asian, Hispanic/Latinx, Indigenous/Native, Middle Eastern/Arab, Pacific Islander, South Asian, and Other. The remaining three categories were tracked at a broader "macro" level, with a simple yes/no determination. For example, any identified author disability would simply be marked "yes," rather than trying to categorize the specifics of the disability.

A	B	C	D	E	F	G	H
Title	**Author**	**Fund**	**Race/Ethnicity**	**Gender**	**Disability?**	**Queer?**	**Intersectional?**
How data happened : a history from the age of reason to the age of algorithms	Chris Wiggins and Matthew L. Jones	Comp Sci			N	N	N
I feel no peace : Rohingya fleeing over seas & rivers	Kaamil Ahmed	Geography	Middle Eastern/Arab		N	N	N
Invisible Friends: How Microbes Shape our Lives and the World around us	Robinson, Jake	Biology			N	N	N
Invisible labour in modern science	JENNY BANGHAM; **XAN CHACKO** AND JUDITH KAPLAN	Diversity	South Asian	Underrepresented in field	N	N	Y
Jungle: How Tropical Forests Shaped the World—and Us	Roberts, Patrick	Geography			N	N	N
Last Politician: Inside Joe Biden's White House and the Struggle for America's future	Foer, Franklin	Poli Sci			N	N	N
Less heat, more light : a guided tour of weather, climate, and climate change	John Aber	Geography			N	N	N
Lethal seas	Ingleton, Sally	Geography		Underrepresented in field	N	N	N
Life sculpted : tales of the animals, plants, and fungi that drill, break, and scrape to shape the earth	Anthony J. Martin	Geography			N	N	N
Maggots, murder, and men : memories and reflections of a forensic entomologist	Zakaria Erzinclioglu	Biology	Middle Eastern/Arab		N	N	N
Making space for women : stories from trailblazing women of NASA's Johnson Space Center	Jennifer M. Ross-Nazzal	Diversity		Underrepresented in field	N	N	N
MANY VOICES OF MODERN PHYSICS: WRITTEN COMMUNICATION PRACTICES OF KEY DISCOVERIES.	Alan G. Gross and Joseph E. Harmon	Biology			N	N	N
MCAT mnemonics : 2024-2025	Cambridge	Biology			N	N	N
Meme Wars: The untold story of the online battles upending democracy in America	Donovan, Joan	Poli Sci			N	N	N
Modern particle physics	Mark Thomson	Physics			N	N	N
MORE THAN A GLITCH: CONFRONTING RACE, GENDER, AND ABILITY BIAS IN TECH.	Meredith Broussard	Biology	Black/African-American	Underrepresented in field	N	N	Y
Most Delicious Poison: The Story of Nature's Toxins - From Spices to Vices	Whiteman, Noah	Biology			N	Y	N
Never Suck a Dead Man's Hand: Curious Adventures of a CSI	Kollman, Dana	Biology		Underrepresented in field	N	N	N

Figure 3. A snippet of the Diversity Purchasing Spreadsheet showing analysis of race/ethnicity, gender, disability, queer, and intersectional in STEM fields.

Disability	Gender	Global Region	Immigrant Status	Mental Health	Race/Ethnicity	Religion	Sexual Orientation
Autism	Intersex	Australia and New Zealand	Citizen	Anxiety	African	Buddhist	Asexual
Blind/Vision impaired	Nonbinary	Canada and US	Immigrant	Bipolar Disorder	Black/African-American	Hindu	Bisexual
Deaf/Hard of Hearing	Trans man	Caribbean	Refugee	Conduct/Dissocial disorders	East Asian	Indigenous religion	Gay
Learning disability/ADHD	Trans woman	Central Asia	Second generation	Depression	Hispanic/Latinx	Jewish	Lesbian
Mental health	Underrepresented in field	East Asia	Undocumented	Eating disorders	Indigenous/Native	Minority Christian	Pansexual
Neurodivergent	Other	Eastern Europe	Other	Neurodevelopmental disorders	Middle Eastern/Arab	Muslim	Queer
Physical/Mobility disability		Mexico and Central America		PTSD	Pacific Islander	Pagan	Other
Other		North Africa and Middle East		Schizophrenia	South Asian	Underrepresented religion	
		Pacific Islands/Oceania		Other	Other	Other	
		Russia					
		South America					
		South/Southeast Asia					
		Sub-Saharan Africa					
		Western Europe					
		Other					

Figure 4. Macro-enabled master list of potential areas of assessment in diversity and inclusion liaison areas.

Due to the nature of the liaison areas tracked in this pilot year, this project focused on author diversity rather than book content. However, based on the varying needs of other liaison areas, The Spreadsheet is versatile enough to be adapted to both authorship and content analysis. Content analysis might be especially useful in the social sciences, particularly for liaisons evaluating whether marginalized groups are represented in their own voices. Additionally, The Spreadsheet can be adapted to assess diversity and inclusion in other library projects, such as evaluating the materials represented in social media posts or book displays.

Lessons Learned and Recommendations

Project 1

Ultimately, the method used for the leisure collection audit did not accomplish what we were hoping it would, and the audit itself proved not particularly useful for us.

We had been hoping to be able to use this method to review our general academic collections, but the leisure audit revealed that this method of diversity analysis does not work well with most nonfiction books and therefore would not work well to assess most academic-focused collections (literature could be an exception, if the goal is to diversify the types of stories told). This method of analysis focuses almost exclusively on the "main character(s)" and is not flexible enough to account for nonfiction works that do not have a main character. For those interested in doing a content analysis of their nonfiction collections, consider instead using Springmier et al.'s[21] approach of creating a rubric with yes/no questions tailored to the content being assessed.

After completing the audit and analysis, the main reaction among the librarians was a sense of "So what?" This highlighted that while we had articulated and met our goal of figuring out if this type of analysis might work for our general academic collections, we had not taken the time to articulate how we were defining "a diverse collection"—for instance, were there specific percentages we wanted to hit? If so, how were we determining those percentages? Did we want to aim for national demographics? Regional? Institutional?—or what we wanted to do with the data once available. As a result, we were ambitiously broad and unfocused in our data collection, the Collection Development Coordinator struggled over how to present the data in the report because there were no specific questions to answer, and we had no idea what action we should take in response to the report. While the intention had been to set goals and to define criteria for "diverse enough" after the fact, this never happened. We delayed the decision in the first place because we were unsure of what questions we wanted the data to answer, and more time and data did not help bring clarity or fresh

ideas, so the matter ended up being dropped with a resounding conclusion that we had no idea how the data could be useful.

Based on this experience, we recommend undertaking an audit only if the audit will help you answer specific questions with actionable outcomes, defined in advance. For instance, are you seeking to determine whether your collections are "diverse enough" in this moment in time or are you looking to track the diversity of your collection over time? How would you define "diverse enough" or "a more diverse collection" for yourselves? What would signify a need to improve? How do you anticipate making those improvements?

In addition to the lessons learned from the audit's outcomes, we also learned some things from the process that are applicable across this sort of diversity work.

First, be alert for the unintentional introduction of biases, even from those well-educated on a given topic. For instance, we realized after the fact that we had erred regarding our gender categories, using the labels "men," "women," "trans men," "trans women," and "non-binary," when what we actually meant was "cis men," "cis women," "trans men," "trans women," and "non-binary." A careful, critical review specifically looking for this sort of error prior to finalizing any given category list or document is warranted.

Second, we recommend defining the terms being used in the audit. People have different levels of familiarity with the different areas of Diversity, Equity, and Inclusion (DEI) work, so terms which are clear for one person may not be clear for another. For instance, we originally used the term "ace" (a common abbreviation in the LGBTQ+ community for "asexual") as a sexuality subcategory, but it turned out that not everyone on our team was familiar with the term in that context and therefore didn't initially know what was meant. We did not provide definitions, so one of the librarians had to overcome the barrier of admitting ignorance to seek clarification on the term's intended meaning. Having established definitions may also help reduce miscategorizations; in our audit, errors in categorization were more common in relation to marginalized identities. In general, developing a shared DEI-related vocabulary, such as that recommended by Puente and Aiko Moore,[26] would lend itself well to an audit of this nature.

Third, consider whether predefined lists of categories, open-ended responses (with post hoc categorization), or a mix of the two (such as predefined categories plus an open-ended "other" category) would be most useful. Predefined categories make the subsequent analysis easier but run the risk of accidentally excluding certain populations. For instance, we built our "ages" category from a normal human lifespan and did not allow open-ended responses, which meant there was no way to accurately categorize fantasy characters with nonhuman lifespans, such as immortal characters. On the other hand, open-ended responses ensure that nothing gets left out and allow for more nuance but are more difficult to analyze because they are not precategorized. Using a mixed approach mitigates the risk of accidentally excluding certain populations and reduces the number of open-ended responses that must be categorized but still requires the complexity of coding open-ended responses. None of these approaches is inherently superior; it's mostly a question of how and when it makes sense to categorize your specific data.

Project 2

As with Project 1, the process of categorizing diversity presented inherent limitations. To assess each author, the project relied on information available through Google searches and details provided within the books themselves. This method often required making categorization decisions

based on limited publicly available information such as names or photographs without direct input from the authors. As a result, the tracking of diverse purchases is imprecise and incomplete, reflecting the broader difficulties of accurately ascribing labels to diverse identities.

Assessing diversity over a yearlong budget cycle presents significant limitations, as it provides only a snapshot rather than a comprehensive view of long-term trends and patterns. This brief time may not capture fluctuations in author diversity, discipline trends, or the impact of evolving acquisition policies. To truly make the project useful, liaison purchasing trends should be assessed over a multiyear period.

Because Project 1 was completed first, various diversity categories were adjusted for Project 2. For example, in the race/ethnicity category, a Middle Eastern/Arab option was added, and some diversity dimensions used a simple yes/no rather than a detailed categorization.

Despite these limitations, the primary aim of The Spreadsheet was to identify broad purchasing trends within specific liaison areas to better understand the overall diversity represented in the library's collection and to highlight specific populations that could be better represented within the SU, USM schools, and USMAI library consortium context. By providing a snapshot of author diversity in book purchases, the project aimed to inform future collection development strategies, make individual liaisons aware of the level to which they included historically underrepresented authors in their liaison purchasing, and encourage liaisons to seek book purchases that better represent an inclusive collection. For example, The Spreadsheet showed relatively balanced purchasing trends for gender even within STEM areas typically dominated by men, such as physics. However, in all STEM areas there were precious few books purchased that were written by Black or African American authors. While authors of both East Asian and South Asian ethnicity appeared in most STEM disciplines, most of these authors were US-based men, highlighting a need to investigate intersectional authors and authors living and working in The Global South. The Spreadsheet also revealed a need for more research resources beyond the male-female sex binary, particularly in the biological sciences.

This hyperlocal purchasing audit will help inform research into potential additions to the SU Libraries collection and inform purchasing decisions for the next year of library purchasing. It enables us to fill gaps "on the go" by making minute, specific changes in purchasing patterns—which is helpful for ever-shrinking budgets—rather than enabling sweeping changes made through large purchases based on a comprehensive, overarching understanding of the collection. The Spreadsheet provided some insight on which diversity categories were less useful for STEM liaison areas, such as disability status, which was difficult to ascertain from Google searches. Furthermore, The Spreadsheet provides concrete data to aid library staff in selecting new items for book displays and other collection promotions.

Conclusion

Neither of these audits' approaches solve the issue of diversifying collections completely. Given that this is an impossible goal to accomplish in any one project, we did find value in both audits—in learning what works and what does not if nothing else. Project 1 failed to prove a good fit for the predominantly nonfiction collection of an academic library, but it did provide good learning opportunities regarding project planning, setting clear goals, the critical importance of clear definitions, and guiding us toward a more focused approach. Project 2 provided that more focused approach. The Spreadsheet allows for more customization, from year to year, as well as between liaisons and their subject-specific needs. Due to the very nature of the customization, however, it

would likely be unsuitable for a wide-sweeping collection audit. SU Libraries intends to continue Project 2 on an ongoing basis, seeking broader adoption from other liaison librarians than the initial pilot reported here.

Methods of content assessment for academic collections is an underexplored area; it would be interesting to see more academic libraries creating their own non-identity-based rubrics for evaluating the contents of their collections, or possibly even coming up with novel approaches to content analysis.

This work demonstrates the value of practical, scalable tools for assessing library collections and acquisitions in ways that are responsive to local needs. While no single project can fully capture the multifaceted nature of diversity, our experience shows that incremental, sustainable practices can bring diversity considerations into the everyday workflow of liaison librarianship. More broadly, our findings reinforce the idea that diversity audits are not one-time exercises but ongoing commitments that require thoughtful design, community input, and professional reflection.

Overall, we recommend sticking to something more focused, whatever the chosen method, rather than attempting to get everything all at once. In order to achieve a more comprehensive picture of the diversity of the collection, the more focused approach does require consistent commitment over several years from those responsible for the collection, rather than commitment to a one-time project, but it is more likely to result in actionable results.

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