

From the President of RUSA

# Finding Joy in Libraries 24/7/365

Shannon D. Jones

As I write my final column as RUSA President in April, I am struck by how fitting it is to do so during a month when library workers pause to celebrate our profession and the impact our libraries have on the communities we serve. Reflecting on the 2026 National Library Week theme, "Find Your Joy," I find myself considering not only the role that libraries of all types play but also the role they have played in my own life. While National Library Week is the designated week for us to celebrate, I find joy in libraries 24/7/365. The "Find Your Joy" theme invites each of us to consider where and how we experience joy in our libraries and in the work we do every day as library workers. For me, that reflection begins with my "why."

## My Library Origin Story

My library "why" prompts me to think of my library origin story. My love for libraries began as a child in my hometown at Norfolk (Virginia) Public Library's Blyden Branch. I remember the sense of excitement and possibility I felt each time I walked into that library as a young girl: the sounds of children talking while doing homework, pages turning, and the quiet hum of discovery as I navigated the card catalog and browsed the bookshelves. During the summer months, the librarians planned activities for us, often with cookies and punch afterward. I loved those cookies. Those small moments are some of my favorite and most vivid memories. I felt joy, but just as important, I felt welcomed, safe, affirmed, seen, and heard.

Some of my fondest memories center on my interactions with the library workers, especially the librarian, who happened to be Black, just like me. She was one of the smartest people I had ever met. No matter what question I asked, she always had an answer. She was kind and caring, and she showed deep compassion for the people who used the library. My admiration for her remains today, although at the time, I never imagined I could one day become a librarian myself.

At the time, I did not have the language to describe what I was seeing, but I now understand that representation matters. Seeing someone who looked like me in a role centered on information, curiosity, and service left an impression on me that I carry with me every day. The Blyden Branch was a place where I felt welcomed and valued, where adults treated the children in my neighborhood like we mattered.

What I did not know as a child, but later learned as I became immersed in librarianship, is that the Blyden Branch holds a special place in Norfolk's history. The branch opened on July 19, 1921, in a single room of the original Booker T. Washington High School. In that room, the library provided library service to the city's Black residents as the first municipally supported public library in Virginia created specifically to serve the Black community during segregation.<sup>1</sup> Today, the library's more than century-long legacy stands as a reminder of the resilience of Black communities and the importance of access to knowledge.<sup>2</sup>

In many ways, the values I carry with me today as a library leader, including curiosity, access, belonging, and service, were quietly taking shape during those early days at the Blyden Branch.

## The Joy That Stays with Us

When I think about the theme “Find Your Joy,” my mind immediately returns to those early days at the Blyden Branch. The joy I experienced was not just about books, although I certainly loved discovering new stories. I derived joy. But the joy was also about the people who worked there and the environment they created. They made the library feel like a place where curiosity was encouraged, where questions were welcomed, and where young people like me felt we belonged.

Now, as a library leader, I understand that the joy I experienced in libraries as a child continues to shape how I think about the way I want people to experience my library today. For me, finding joy in the library is rooted in curiosity, a sense of belonging, and the idea of the library as a safe and welcoming space. I want my library to also be rooted in what I refer to as the *thrill of the hunt*. For my own information-seeking behavior, I always love the excitement of finding the needle in a haystack. I am rewarded by and find great satisfaction in helping individuals do the same.

I also find joy in seeing people feel comfortable in the library, viewing it as a third place where they can simply be themselves. Libraries are places where people can gather, reflect, explore ideas, or lose themselves in a good book. As a young reader, I often found myself drawn to stories about women and girls whose lives were very different from my own. Their cultures, experiences, and journeys opened my eyes to worlds I had never encountered.

Another source of joy I have found in libraries is the ability to get lost in a good book. Several books remain especially vivid in my memory. I remember being captivated by *Princess Sultana's Daughters*. I was deeply moved by *The Color Purple*, and I was also drawn to stories like *The Women of Brewster Place* and *The Joy Luck Club*. What these books had in common was that they introduced me to women whose lives and experiences were shaped by cultures, histories, and circumstances that were different from my own. Whether the characters looked like me or not, their stories expanded my understanding of the world and deepened my appreciation for the power of storytelling.

While my own journey into librarianship began with those early experiences, filled with curiosity, belonging, and discovery, I know that each of us who works in libraries carries our own story about what brings us joy in this profession. As I reflected on the theme of finding joy, I found myself wondering how others experience joy in libraries and library work. I invited members of the RUSA Board to share a few words about how they find joy in libraries and in library work. Their responses were thoughtful, inspiring, and deeply personal. What follows are reflections from colleagues across our profession, shared in their own words.

## Finding Joy: Voices from RUSA Leaders

“Over the past 29 years of working in the library world, one constant source of joy has been the opportunities I have had to work with my RUSA colleagues from all types of libraries. Their passion and commitment to serving library users have informed and inspired my work, and my life has been better for knowing them.”

**Barry Trott**

Editor, *RUSQ: A Journal of Reference and User Experience*  
Library of Virginia

"I find joy in libraries when I see how much of a difference the library makes for students. Even if it's just being able to check out a book, find a source for a paper, or grab lunch with friends, I can tell it means something to them. It reminds me of how important the library was for me, and makes the work feel full circle."

**Ilana Stonebraker**

RUSA Past President  
Indiana University Libraries

"Joy arises from the daily, meaningful interactions librarians have while catering to patrons of diverse needs, interests, ages, and cultural backgrounds. These encounters offer immediate positive feedback and emotional reciprocity, which bolsters a librarian's sense of social and ethical purpose. The impact of these interactions implicitly fosters compassion satisfaction. It results from doing meaningful work, leading to the deep, enduring fulfillment that comes from helping others and experiencing the gratitude and appreciation patrons express in return."

**Kay Coates (she/her)**

RUSA RSS Representative  
Georgia Southern University

"Finding joy in library work often comes from the quiet realization that we aren't just managing buildings or collections, but cultivating ecosystems where people feel seen, heard, and empowered. For me, joy is found in the humanity of our service. It is in the transformative moment when a librarian trainee realizes their potential, or when a community's oral history is preserved, ensuring that the voices of our streets are never lost to time. There is a profound sense of fulfillment in building "future-ready" spaces—not just through technology, but through an unwavering commitment to equity and inclusion that makes every neighbor feel they belong. The heartbeat of this work lies in resilience and mentorship. Whether it is navigating the complexities of a system-wide transition or guiding a graduate student through the intricacies of collection management, the reward is the same: seeing the next generation of leaders rise. My joy is rooted in the belief that libraries are essential pillars of social impact, and being able to champion that mission alongside a dedicated workforce is the greatest professional privilege."

**Taina Evan**

RUSA Secretary  
Brooklyn Public Library

Together, these reflections remind me that while our paths into librarianship may differ, the joy we find in this work is deeply rooted in connection, purpose, and the communities we serve.

## **Joy in the Work We Do**

Another important dimension of this conversation is the role of joy in our work. In a profession deeply rooted in service, care, and responsiveness to the needs of others, finding space for joy sometimes feels difficult, especially during challenging times. Yet there is growing recognition that joy, meaning, and engagement are not separate from our work. They are essential to sustaining it.

Often, I read LinkedIn posts in which individuals reflect on the importance of finding joy in their work and the role it plays in sustaining passion and purpose. These reflections remind us that joy is not just a fleeting emotion but an ongoing privilege that can be cultivated through connection, meaning, and a sense of progress.

Popular conversations about joy in work have also entered the broader cultural landscape. Marie Kondo introduced the concept of “sparkling joy.” I remember enjoying episodes of her Netflix series *Tidying Up with Marie Kondo* and being drawn in by the individuals with whom she worked as they used her KonMari method for tidying and decluttering their homes. I will be revisiting her method this summer to organize and declutter my home office to reflect on what brings me joy. In the series, Kondo explains that the goal of tidying is to learn to cherish what you have by gathering items in one place, recognizing their abundance, and choosing to keep only those that spark joy.<sup>3</sup> She later expanded this approach into the workplace in *Joy at Work: Organizing Your Professional Life*, coauthored with Scott Sonenshein. Their message is simple but powerful. When we can identify what brings us joy and aligns our environments and practices, we create space for greater clarity, purpose, and fulfillment.<sup>4</sup>

A growing body of evidence demonstrates the tangible impact of joy in the workplace. Research shows that cultivating joy at work contributes to increased employee engagement, stronger teamwork, and a greater sense of belonging. Joy is linked to improved productivity, enhanced creativity, increased resilience, and reduced burnout. Organizations that intentionally foster joy are more likely to retain employees, strengthen workplace culture, and support long-term success.<sup>5</sup>

Importantly, joy is not something that happens by accident. It is cultivated through environments where people feel valued, supported, and connected to the larger mission of their organization. Leadership plays a critical role in setting the tone through clear communication, responsiveness, and modeling of behaviors that prioritize well-being and engagement. At the same time, joy is a shared responsibility across the organization, shaped by how individuals support one another, build trust, and create moments of connection in their daily work.<sup>6</sup>

For those of us in libraries, this shared responsibility is especially important. Our work centers on supporting others, often during moments when they are seeking answers, navigating uncertainty, or pursuing new opportunities. The ability to find and sustain joy in this work is not a luxury. It is a necessity, allowing us to show up fully for our communities and for one another.

## A Moment to Reflect

In closing, I invite you to take a moment to reflect on your origin story in libraries and what sparks library joy for you. No matter how you are celebrating National Library Week or what your origin story in libraries may be, I hope you will pause to revisit your “why.” What first drew you to this profession? What moments, people, or experiences sparked your love for library work?

For many of us, the past few years have been challenging. In the current moment, it can sometimes be difficult to remember why we chose to work in spaces dedicated to information access, intellectual curiosity, and connecting people with the knowledge they need at important moments in their lives. Yet our work matters. The care we bring to serving our communities matters. And each of you showing up every day to do this work matters.

Libraries continue to serve as places where people seek answers, discover new ideas, and find connection. They remain spaces where curiosity is encouraged, voices are heard, and communities come together.

So, as we celebrate National Library Week in April 2026 and the theme “Find Your Joy,” I invite you to reflect on the moments that remind you why you do this work. What brings you joy in the library? And how might reconnecting with that joy help you recenter, refresh, and renew your love for this profession?

In doing so, we not only sustain ourselves, but we also strengthen the environments we create for others.

And perhaps in doing so, we create the conditions for the next generation of library users to discover that libraries are places where they can find information and experience environments that bring them joy.

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## Alert Collector

Matthew Galloway, Col. Ed.

# Games in the Stacks

## Sourcing Board Games and Tabletop Role-Playing Games for Your Library

Rachel Knight

One of the many words I use to describe myself is *gamer*. I've been watching my parents play board games and tabletop role-playing games for my entire life, and I've been playing them myself for nearly that long. I volunteer at conventions each summer to help others experience the joy these games can bring, and I'm a proud member of ALA's Games and Gaming Round Table (GameRT).<sup>1</sup> There's something for everyone, from well-known classics like Monopoly and Dungeons and Dragons to modern standouts like Exploding Kittens and Heart: The City Beneath. Just like how there are patrons coming into the library who want to read James Patterson's newest book or watch Tom Cruise do his own stunts, there are patrons who love to sit down at a table and play.

## Why Games?

GameRT has a wonderful article on why games and gaming belong in the library, which contains links to a variety of resources.<sup>2</sup> To summarize, all sorts of libraries can use games to support library missions, from entertaining a variety of age groups and demographics to promoting critical thinking and encouraging language skills.<sup>3</sup>

Board games and card games are the most common types of games in many library collections—because both are frequently lumped together as “board games” by publishers and retailers, this article will do the same. These are the games many grew up with for family game nights or fun times with friends and family, everything from euchre to Rummikub to Catan falls under this category. Classics like Phase 10 remain popular, and there's also a steady stream of new titles coming out from a variety of publishers. There are board games for families, board games for children, and board games for adults. There's also a variety of lengths of board games, ranging from under an hour to an entire day or more of playtime. You can't go wrong with a few traditional decks of cards added to a library's game collection, but there's so much more out there as well.

Tabletop role-playing games, or TTRPGs, tend to resemble books more than the UNO and backgammon games of our childhoods. These games involve players acting or “role-playing” as imaginary characters and going on adventures together,<sup>4</sup> and they are growing in popularity thanks to the success of shows like *Stranger Things* and *The Legend of Vox Machina*. Most TTRPGs require someone to volunteer as the Game Master, or GM (sometimes known as the *Dungeon Master* [DM]), to run the game. The GM creates a world for the players to explore, with rules and mechanics

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varying from one TTRPG to another, and the GMs often read more TTRPG books than their players so that they can understand the specific TTRPG they're running. There are some TTRPGs that do not require a GM and instead have the players create a world together, but these are less common. While Dungeons and Dragons is one of the most well-known TTRPGs, especially the 2014 Fifth Edition and its 5.5 update from 2024,<sup>5</sup> it's not the only TTRPG that can be a good fit for library shelves.

Video games can be another wonderful addition to a library's collection. However, due to the unique complexities and hurdles associated with digital media and electronic devices, they are outside this article's scope.

## Locating Game Reviews

Unlike traditional books, board games and TTRPGs aren't likely to appear in *Kirkus Reviews*, *School Library Journal*, *Booklist*, or similar publications. So where does one go to locate game reviews and recommendations when selecting games for a library setting?

A useful source for locating games recommended for libraries is the Platinum Play Hall of Fame, also known as the Platys, curated by ALA's GameRT.<sup>6</sup> This list is intended for libraries, highlighting games that are good fits for library collections and/or programming, with preference given to games that can be played in less than an hour, have some level of uniqueness, and cater to a range of ages.<sup>7</sup> The Platys includes a list of Platinum Plays selected from games published two to ten years prior, with new titles added annually beginning in 2024.<sup>8</sup> The Platys also includes Platinum Play—Classics, defined as "evergreen titles well-suited to Library programs and collections."<sup>9</sup> Categories for the Platys are Board and Card Games, Tabletop Role-Playing Games, and Video Games.

Along with the library-focused Platys, there are many other awards for outstanding board games and TTRPGs. Some, such as the Origins Awards,<sup>10</sup> include categories for both board games and TTRPGs. Many are issued only to board games, including the Spiel des Jahres and Mensa Select®.<sup>11</sup> A few are issued only to TTRPGs, with one of the most well known being the ENNIE Awards.<sup>12</sup> All of these awards, and many others, highlight outstanding games that could be popular with patrons.

However, not every wonderful game wins an award, and not every award includes information about what makes a game great. One of the better sources out there for information about nearly every board game is BoardGameGeek. BoardGameGeek is a board game database that includes over 120,000 games.<sup>13</sup> For TTRPGs, there's RPGGeek, another database from BoardGameGeek, LLC.<sup>14</sup> Both databases are completely free to use, and they include all sorts of helpful information about a variety of games, from genre classifications and player counts to community ratings and forum discussions.

## Where to Purchase Games

Unfortunately, board games and TTRPGs rarely appear in the catalogs of traditional library vendors like Brodart and Ingram. Many titles will be available on Amazon, but not all, and it can be difficult to locate genuine listings amid a sea of fake ones. Additionally, many publishers prefer that their games be ordered elsewhere instead of via Amazon because of the company's history of shady business practices.<sup>15</sup> However, for libraries that are limited in where they can order materials, Amazon can be one of the better options for building a game collection without having to create accounts with multiple new vendors.

For many games, the best way to order is directly from the publisher, and there are a not-insignificant number of publishers that will happily donate games to a library's collection if said library reaches out. GameRT maintains a list of game publishers and organizations that provide discounts and/or free games to libraries.<sup>16</sup> A nonprofit organization on GameRT's list, the Spiel Foundation, donates bundles of board games to organizations such as libraries. A TTRPG distributor on the list, Indie Press Revolution (IPR),<sup>17</sup> will be attending 2026's ALA Annual.<sup>18</sup> Another major TTRPG publisher and distributor is Studio 2 Publishing,<sup>19</sup> although as of the time of this article's publication, Studio 2 doesn't offer any sort of discount program for library orders. There isn't a Studio 2 or IPR for board games, so many of them have to be ordered directly from the publisher or from a larger online storefront like Amazon. Some publishers and distributors would love to see their games on library shelves but don't know where to start, especially because a large majority of board games and TTRPGs are produced by small publishers—if you find a game that would be a good fit for your library, try reaching out to the publisher!

## Want to Learn More?

The lovely folks of GameRT are always happy to talk about the intersection of games and libraries. Check out the GameRT blog and resources at <https://games.ala.org/> for a variety of articles on board games, TTRPGs, and more!

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Reader's Advisory  
*Craig Clark, Col. Ed.*

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# Using Book Awards and Notable Lists to Create a Reader's Advisory Knowledge Base

Craig Clark

I believe it's not a stretch to say most librarians enjoy a robust list or book award, and I am no exception. I have been enamored with book awards and lists since becoming a librarian in 1999. I used awards to expand my knowledge base for literature and nonfiction, create displays and bookmarks, and initiate discussions with patrons and staff to explore reading interests. For novice reference librarians, researching lists and awards is an effective way to develop links within a finite set of books or authors, and as knowledge of genres and styles grows, it will become easier to effectively conduct reference interviews and communicate with patrons. My number-one rule for reader's advisors (RAs): Be curious!

I have compiled a list of awards and booklists curated by judges and committee panels. I prefer these to algorithmic or popular starred aggregations because, well, I'm biased to the human connections of reading titles as a group and having lively discussions with peers to develop thoughtful and meaningful lists that promote reading and outstanding authors.

Starting with the obvious: ALA awards. I may be preaching to the choir, but as I am currently serving on the Notable Books Council and previously served on the Andrew Carnegie committee, again, I'm biased. Readers of *RUSQ* will undoubtedly be familiar with these award committees, so I am including the most current titles in the list at the end of this article, but other than the links in this paragraph, I will forego further explanation.

There are many familiar book awards that receive national exposure and command media attention. The most prestigious awards are listed first, followed by a group of awards that have more specific missions and goals. The article concludes with a list of the most current award recipients at the time of this writing. Also, the focus of this article is literary fiction, nonfiction, and poetry; a future installment will address resources and awards for genre fiction.

## The Booker Prize

As noted on the Booker Prize website:

Founded in the UK in 1969, the Booker Prize is the world's most significant award for a single work of fiction. Each year, the prize is awarded to what is, in the opinion of our judges, the best sustained work of fiction written in English and published in the UK and Ireland. The winning book is a work that not

only speaks to our current times, but also one that will endure and join the pantheon of great literature. The winner and the shortlisted authors are guaranteed a global readership and a life-changing increase in book sales. The winner of the Booker Prize also receives £50,000, with £2,500 awarded to each of the other shortlisted authors.<sup>1</sup>

A longlist is published in July of a given year, followed by a shortlist of six titles in late September. The winner is announced in early November. The Booker website also includes reading guides and other educational materials for readers and librarians. *Of note to children's librarians: The Children's Booker Prize inaugural award will be announced in February 2027. It celebrates the best in contemporary fiction for children eight to twelve years old.*

## The National Book Award

The mission of the National Book Foundation is to "celebrate the best literature published in the United States, connect books with readers of all ages, and champion the literary arts as a vital part of our culture."<sup>2</sup>

The National Book Award is the most prestigious award for literature published in the United States for a given year. This award, which was first awarded in 1950 and is sponsored by the American Book Publishers Council, the Book Manufacturers' Institute, and the American Booksellers Association, has evolved over the years, adding and changing categories, but it has always focused on literary excellence. Look for longlists in mid-September of a given year, with the finalists being announced in November.

## The Pulitzer Prizes

The Pulitzer Prizes are arguably the most recognizable book awards in the United States. The Pulitzer committee accepts submissions throughout a given year, and awards are announced in the spring of the following year. It should be noted that although titles are judged by juried panels, there is a \$75 fee associated with individual submissions, and as of 2026, award recipients receive a \$15,000 prize. The current categories for literature are as follows:

- For distinguished fiction by an American author, preferably dealing with American life
- For a distinguished and appropriately documented book on the history of the United States
- For a distinguished and appropriately documented biography by an American author
- For a distinguished and factual memoir or autobiography by an American author
- For a distinguished volume of original verse by an American author
- For a distinguished and appropriately documented book of nonfiction by an American author that is not eligible for consideration in any other category

The following book awards offer distinct perspectives regarding literary fiction, nonfiction, poetry, and other categories. They are committee and/or membership based, and they often enlist authors, critics, and other influential persons to serve as judges. Also, there are no costs to the authors or publishers to be considered, and in many cases, submissions are requested by the committees, and unsolicited submissions are not considered. The websites offer numerous resources to assist RAs in building a personal knowledge base, finding inspiration for displays or programs, and directly linking readers with valuable and entertaining information regarding acclaimed literature and authors.

## The Anisfield-Wolf Book Awards

As noted on the Anisfield-Wolf website, "The Anisfield-Wolf Book Awards recognize books that have made important contributions to our understanding of racism and human diversity. Cleveland poet and philanthropist Edith Anisfield Wolf established the book awards in 1935, in honor of her father, John Anisfield, and husband, Eugene Wolf, to reflect her family's passion for social justice. Presented by the Cleveland Foundation, it remains the only American book prize focusing on works that address racism and diversity."<sup>3</sup>

I was unaware of this prestigious award until I began working at the Cleveland Public Library in 1999. There is a wonderful awards ceremony in Cleveland, Ohio, that showcases the writers, which, until recently, was led by Henry Louis Gates Jr. Currently, Pulitzer Prize-winning author, former US Poet Laureate, and 2021 Anisfield-Wolf nonfiction winner Natasha Trethewey leads the jury of prominent scholars and writers. This award celebrates a diverse group of writers and poets, and the listing of current and past winners on the website is an excellent resource for exploring literary writings and creating book displays and materials showcasing a wide range of social issues. Award recipients receive a \$30,000 prize. The awards are announced in April, and the ceremony takes place in September.

## The Dublin Literary Award (Formerly the IMPAC Dublin Literary Award)

As noted on the Dublin Literary Award website, "Since its inception in 1996, the Dublin Literary Award has celebrated outstanding achievements in global literature. Awarded annually by Dublin City Council, this prestigious prize is among the most significant literary honors worldwide, distinguished by its unique nomination process that involves libraries from cities across the globe. The award recognizes a single work of international fiction, whether originally written in English or translated into it, with a generous prize of €100,000. If the winning title is a translation, the author receives €75,000, while the translator is awarded €25,000."<sup>4</sup>

This is one of the most unique literary prizes in the world—and with the 100,000-euro award, one of the most generous. Any major library can apply to submit titles for the award, which are then evaluated by an award committee consisting of representatives from Dublin's library and city council. A longlist is announced and judged by an esteemed group of international authors. The only drawback to the award is that the 2026 award, which will be announced in May of 2026, includes books published between July 1 and June 30 of 2025. However, the breadth of the nominations, author profiles, and extensive annotations make it an award worth looking at for RA suggestions regarding international fiction and translations.

On a related side note, the Dublin Literary Award was my gateway to reader's advisory work when I was a novice librarian. A group of us convinced the deputy director of our library to form an informal committee of readers to nominate books to the award. The application to participate was simple, but the committee had to be led by the administration. Our committee consisted of a lowly librarian (me), the deputy director, the head of the literature department, and a security guard. We met every other month and talked about titles during lunch. Those spirited discussions in an informal setting with a wide range of employees made me appreciate the joy of sharing books with others and collaborating with peers, and I would encourage library staff everywhere to recognize that one of the best tools of RAs is working together both formally and informally.

## The National Book Critics Circle Awards

Not to be confused with the National Book Award, “the National Book Critics Circle awards are given each March and honor literature published in the United States in six categories—autobiography, biography, criticism, fiction, nonfiction, and poetry. These are the only national literary awards chosen by critics themselves. In addition, we award two prizes voted on by membership: the John Leonard Prize for the best first book in any genre and the Gregg Barrios Book in Translation Prize, for the best book of any genre translated into English and published in the United States.”<sup>5</sup>

The award ceremony occurs in March and considers books from the previous year. Members of the National Book Critics Circle select and vote on titles, but publishers can send copies to the committee members for consideration. The website provides lists of past winners and finalists and offers a unique perspective on literary awards.

## Women’s Prize for Fiction and Non-Fiction (Formerly the Orange Prize for Fiction and the Bailey’s Women’s Prize for Fiction)

Another prestigious award that doesn’t garner enough exposure in the United States is the UK-based Women’s Prize for Fiction (the Women’s Prize for Non-Fiction was added in 2024). The organization’s mission states: “The Women’s Prize Trust is the charity building a better future by championing women’s writing. We improve access to and appreciation of women’s writing for all readers, providing an awards platform that supports brilliant writers and role models while nurturing an engaged, global community of readers and writers”; they also work to “support writers at all stages of their writing journey, providing opportunities to engage with experts, develop the craft of writing, and find a peer group. Our flagship development program for unpublished writers, Discoveries, aims to seek out, inspire and support writers from those early pages to long-term careers.”<sup>6</sup>

Along with the standard lists and winners found on many award sites, the Women’s Prize Trust website includes a searchable database that sorts by genre, author, mood, and year. Winners are selected from publisher submissions from April through March of the following year, and the winners are announced in June. The site is an excellent resource for librarians, writers, and readers.

The following is a compilation of titles related to the various awards mentioned in this article. The lists can be used as a basis for book displays, book discussions, and general knowledge for RA librarians to build on their knowledge base of titles and authors in the fields of literary fiction, nonfiction, and poetry. Remember, two of the most valuable traits of the RA librarian are curiosity and a willingness to explore outside of one’s reading interests, so please explore the websites and take advantage of the resources to better connect readers with their books.

### 2026 Anisfield-Wolf Winners

- *Born in Flames: The Business of Arson and the Remaking of the American City* by Bench Anisfield (nonfiction)
- *The Hollow Half: A Memoir of Bodies and Borders* by Sarah Aziza (memoir)
- *Death Does Not End the Sea* by Gbenga Adesina (poetry)
- *Make Your Way Home* by Carrie R. Moore (fiction)

## 2026 Booker Prize Shortlist

- *Flashlight* by Susan Choi
- *The Loneliness of Sonia and Sunny* by Kiran Desai
- *Audition* by Katie Kitamura
- *The Rest of Our Lives* by Ben Markovits
- *The Land in Winter* by Andrew Miller
- *Flesh* by David Szalay

## 2026 Dublin Literary Award Shortlist

- *Gliff* by Ali Smith
- *In Late Summer* by Magdalena Blažević
- *Live Fast* by Brigitte Giraud
- *Perspectives* by Laurent Binet
- *The Emperor of Gladness* by Ocean Vuong
- *What I Know About You* by Éric Chacour

## 2025 National Book Award Winners

- *The True True Story of Raja the Gullible* by Rabi Alameddine (fiction)
- *One Day, Everyone Will Have Always Been Against This* by Omar El Akkad (nonfiction)
- *The Intentions of Thunder: New and Selected Poems* by Patricia Smith (poetry)
- *We Are Green and Trembling* by Gabriela Cabezon Cámara, translated by Robin Myers (translation)
- *The Teacher of Nomad Land: A World War II Story* by Levine Querido (young adult)

## 2026 ALA (RUSA/CODES) Notable Books Council

### Fiction

- *Great Black Hope: A Novel* by Rob Franklin
- *Guatemalan Rhapsody: Stories* by Jared Lemus
- *Small Ceremonies: A Novel* by Kyle Edwards
- *The Dream Hotel: A Novel* by Laila Lalami
- *The Emperor of Gladness: A Novel* by Ocean Vuong
- *The Ferryman and His Wife: A Novel* by Frode Grytten, translated by Alison McCullough
- *The Lilac People: A Novel* by Milo Todd
- *The Slip: A Novel* by Lucas Schaefer
- *The Sunflower Boys: A Novel* by Sam Wachman
- *Where Are You Really From: Stories* by Elaine Hsieh Chou

### Nonfiction

- *A Flower Traveled in My Blood: The Incredible True Story of the Grandmothers Who Fought to Find a Stolen Generation of Children* by Haley Cohen Gilliland
- *America, América: A New History of the New World* by Greg Grandin

- *Everything Is Tuberculosis: The History and Persistence of Our Deadliest Infection* by John Green
- *Is a River Alive?* by Robert Macfarlane
- *Looking at Women Looking at War: A War and Justice Diary* by Victoria Amelina
- *No More Tears: The Dark Secrets of Johnson & Johnson* by Gardiner Harris
- *One Day, Everyone Will Have Always Been Against This* by Omar El Akkad
- *Original Sins: The (Mis)education of Black and Native Children and the Construction of American Racism* by Eve L. Ewing
- *Strangers in the Land: Exclusion, Belonging, and the Epic Story of the Chinese in America* by Michael Luo
- *There Is No Place for Us: Working and Homeless in America* by Brian Goldstone
- *Things in Nature Merely Grow* by Yiyun Li
- *Valley of Forgetting: Alzheimer's Families and the Search for a Cure* by Jennie Erin Smith

## Poetry

- *Becoming Ghost* by Cathy Linh Che
- *Gaza: The Poem Said Its Piece* by Nasser Rabah, translated from the Arabic by Ammiel Alcalay, Emna Zghal, and Khaled Al-Hilli
- *Resting Bitch Face: Poems* by Taylor Byas
- *The Opposite of Cruelty: Poems* by Steven Leyva

## 2026 Andrew Carnegie Medals for Excellence in Fiction and Nonfiction

- *A Guardian and a Thief* by Megha Majumdar (fiction winner)
- *The Unworthy* by Agustina Bazterrica, translated by Sarah Moses
- *We Do Not Part* by Han Kang, translated by E. Yaewon and Paige Aniyah Morris
- *Things in Nature Merely Grow* by Yiyun Li (nonfiction winner)
- *Baldwin, Styron, and Me* by Mélikah Abdelmoumen, translated by Catherine Khordoc
- *There Is No Place for Us: Working and Homeless in America* by Brian Goldstone
- *Things in Nature Merely Grow* by Yiyun Li

## 2025 Pulitzer Prize Winners

- *James* by Percival Everett (fiction)
- *Combee: Harriet Tubman, the Combahee River Raid, and Black Freedom During the Civil War* by Edda L. Fields-Black (history)
- *Native Nations: A Millennium in North America* by Kathleen DuVal (history)
- *Every Living Thing: The Great and Deadly Race to Know All Life* by Jason Roberts (biography)
- *Feeding Ghosts: A Graphic Memoir* by Tessa Hulls (memoir)
- *New and Selected Poems* by Marie Howe (poetry)
- *To the Success of Our Hopeless Cause: The Many Lives of the Soviet Dissident Movement* by Benjamin Nathans (nonfiction)

## 2026 The Women's Prize for Fiction Longlist (shortlist not published until after article submission)

- *Gloria Don't Speak* by Lucy Apps
- *Paradiso 17* by Hannah Lillith Assadi

- *Moderation* by Elaine Castillo
- *Flashlight* by Susan Choi
- *Dominion* by Addie E. Citchens
- *The Benefactors* by Wendy Erskine
- *The Correspondent* by Virginia Evans
- *The Mercy Step* by Marcia Hutchinson
- *The Others* by Sheena Kalayil
- *Kingfisher* by Rozie Kelly
- *Heart the Lover* by Lily King
- *Audition* by Katie Kitamura
- *A Guardian and a Thief* by Megha Majumdar
- *Wild Dark Shore* by Charlotte McConaghy
- *The Best of Everything* by Kit de Waal
- *A Beast Slinks Towards Beijing* by Alice Evelyn Yang

## 2026 Women's Prize for Non-Fiction Shortlist

- *The Finest Hotel in Kabul: A People's History of Afghanistan* by Lyse Doucet
- *Art Cure: The Science of How the Arts Transform Our Health* by Daisy Fancourt
- *Artists, Siblings, Visionaries: The Lives and Loves of Gwen and Augustus John* by Judith Mackrell
- *Hotel Exile: Paris in the Shadow of War* by Jane Rogoyska
- *Mother Mary Comes to Me* by Arundhati Roy
- *Nation of Strangers: Rebuilding Home in the 21st Century* by Ece Temelkuran

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## Reference Services and Instruction

Rebecca Graff, Col. Ed.

# Learning That Lasts

## Teaching for Transfer at Reference

Fiona Holly

Imagine a librarian who is teaching a one-shot library instruction session and asks students to share the ways they look for information in their personal lives. The librarian leans into their examples and explains how a practical situation, such as figuring out which car to buy, is similar to but also different from how we locate academic information for a class. This comparison leads to the librarian explaining how looking for information and determining its credibility depend on the context. The car example draws on a familiar experience of information seeking, which helps students more easily understand the concept of finding information in the context of the library.

This method is an example of a foundational theory for enhancing student learning called *learning transfer* or, from the instructor perspective, often phrased in the literature as *teaching for transfer*. From reflective practices to gamification, learning transfer is the key to the conception and development of various teaching methods.<sup>1</sup> Librarians would benefit from being aware of simple practices to teach for transfer, which are often sought out when preparing for library instruction but are less frequently applied during reference interactions.

Theories of learning transfer posit that learning is not just ingesting knowledge but also the ability to apply it in new or different contexts. Research shows, however, that learning transfer doesn't happen automatically. Just because skills have been taught and learned in one context does not mean students can then apply them in a new context.<sup>2</sup> For example, a student of a foreign language may get an A on a vocabulary test yet not be able to use the same words in conversation, which means transfer has not occurred. According to Perkins and Salomon, "Thinking at its most effective depends on specific, context-bound skills and units of knowledge that have little application to other domains. To the extent that transfer does take place, it is highly specific and must be cued, primed, and guided; it seldom occurs spontaneously."<sup>3</sup>

Therefore, to enhance learning, instructors need to teach intentionally for transfer. Perkins and Salomon describe five conditions under which transfer occurs (author's explanation in parentheses):

- Thorough and diverse practice (repetition in multiple contexts)
- Explicit abstraction (drawing principles from previous experience and applying them to new ones)
- Active self-monitoring (reflection on one's learning process, often referred to in more recent literature as *metacognition*)
- Arousing mindfulness (general awareness of engagement in one's surroundings)
- Using a metaphor or analogy (new material studied while considering old material)<sup>4</sup>

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These conditions for transfer are important to librarians if their instructional goals are to be met both in the library classroom and at reference.

Many of the conditions of transfer are already well integrated into traditional teaching practices, although instructors may not be conscious of them. Even the one-minute paper, a classic assessment method in library instruction environments, can be used to enhance learning transfer as students reflect on their experience of the instruction session. Using learning transfer techniques in the one-shot library instruction classroom is especially useful because librarians are limited to a single session.

Examples of librarians teaching for transfer are regularly showing up in the library literature. Riesen and Whitver describe an example of using reflective teaching to enhance their one-shot sessions that shows students making steps toward learning transfer through arousing mindfulness and active self-monitoring.<sup>5</sup> James Lang's popular book *Small Teaching* describes easy, actionable methods for the classroom based on the cognitive foundations for learning transfer, which are gaining traction in library instruction strategies.<sup>6</sup>

## Transfer at Reference

Typical reference interactions, although limited, would benefit from the same principles applied to instructional environments. Moving reference experiences from transactional to instructional is a task that is limited by the nature of the environment but, nevertheless, not impossible. Using some of the verbal cues and methods suggested by learning transfer theorists could make experiences at reference more meaningful for the student and the librarian.

### ***The Reference Interview***

The way librarians frame the reference interview using methods to teach for transfer is one opportunity to shape the learning process for students as they approach reference. The following possibilities can work independently or in conjunction with other strategies and methods:

- Recall previous experiences: "Tell me what you have tried so far." "Have you been successful previously?"
- Demonstrate the process: "What we should do now is break your search down into keywords that the database can use."
- Encourage practice: "Now that we've tried one search with keywords, what are some new searches you could try? Can you think of some other keywords you might want to use?"
- Prompt recall: "Do you remember the name of the database we used?"
- Self-explain: "Tell me why you chose those keywords (or that database)."
- Prompt prediction: "What's one thing you learned from this experience that you can apply to other research assignments?"

### ***Taking the Lead***

Another way to encourage transfer at the reference desk is to allow the library user to take the lead in the search process while being guided by the librarian. If a wireless mouse and keyboard are available, ask the person if they would like to be the one to use the tools. Have the person start at the library website (or go even further back, starting at a web browser) and show their process. The librarian can make recommendations for finding the right resources. Allowing the person to be the one to act instead of just observing takes the person further along in achieving transfer.

## ***In Virtual Environments***

Using techniques that teach for transfer in the virtual environment creates a foundation that students can transfer from in new research settings. A chat reference question could be one of the few opportunities for any kind of library instruction a student has, especially where many institutions have programs that are predominantly online. Unless the library has a particularly robust online instruction program, online students may have large gaps in library skills. Without extra attention, chat-based reference interactions limit opportunities to demonstrate the research process visually and limit personal connection.

Writers in the library literature have described various methods of enhancing virtual reference interactions using strategies tied to theories of learning transfer. Oakleaf and VanScoy outline methods for enhancing digital reference that remain relevant and align with teach-for-transfer techniques, such as Show Don't Tell, Think Aloud, and Let Them Drive.<sup>7</sup> These methods allow the person to practice searches on their own while the librarian walks them through the process. Saunders and Wong provide strategies for identifying similar techniques appropriate to the situation, whether a virtual or in-person encounter.<sup>8</sup> Additional examples to enhance learning transfer in a chat interaction could include suggesting a short virtual meeting to guide the student and to more closely replicate the environment of the in-person session. When a virtual meeting isn't possible, sending screenshots or a recorded video demonstration would also enhance the transfer of learning in the digital environment.

## **Conclusion**

This article demonstrates how learning transfer is the foundation of instructional methodologies common to the library instruction classroom and makes the case for applying those same principles to reference. Teaching for transfer enhances reference interactions using subtle strategies supported by the science of learning. These approaches allow librarians to adapt specific techniques to each student's readiness and availability. For example, the following scenarios describe recent experiences in reference interactions that demonstrate how strategies for learning transfer can be adapted to different modalities in everyday reference work.

In one chat reference interaction, a student requested a quick introduction to library resources, something that would normally require a full tutorial in database selection and keyword searching. Because I knew it would be much more cumbersome for me and the student to use chat alone, I asked whether the student was interested in a virtual meeting. Although the student's time allowed, their environment did not, so instead, I was able to send step-by-step instructions with screenshots that enabled the student to follow along independently.

During that same week, a student visited the reference desk in person, seeking help getting started on a senior thesis. Throughout the session, I prompted the student to suggest keywords, reflect on search results, and recall information, whereas previously, I may have been tempted to do it all myself without including the student in the process.

The principles described are not meant to be prescriptive but to foster intentionality in how librarians approach reference work. Not every interaction will perfectly facilitate learning transfer, but keeping these consistent habits of questioning and guided support provides opportunities for learning that lasts.

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Amplify Your Impact  
Yvonne Dooley, Col. Ed.

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# Successful Marketing Strategies for Scholarly Communications

Agnes Gambill West, Sophia Mosbe, and Julie Shedd

## Introduction

Scholarly communications is rarely visible on the front lines of library and instructional services. In fact, much of the work in scholarly communications takes place behind the scenes and involves a wide-ranging set of capabilities—from institutional repository management to publishing services, copyright expertise, data management, championing open access, and assessment and impact metrics offerings.<sup>1</sup> Marketing these services is as much a balancing act of strategy and resource management as it is an opportunity for broader engagement with faculty departments, graduate schools, research centers, and technology transfer units. Marketing *scholarly communications* is essential because it informs, educates, and engages research communities about services, technical infrastructure, and resources that can positively reinforce a scholar's identity and impact. Without it, scholars may not reap the cascade of additional advantages that would be difficult, if not impossible, for individual researchers to achieve on their own. Some of those advantages might include expanding research networks, measuring influence, finding collaborators, carving out interdisciplinary niches, educating the public, defining research agendas, and integrating ideas deeply into the broader ecosystem of knowledge.

This article discusses four successful marketing strategies that scholarly communications professionals can use to amplify the impact of their scholarly communications programs. What does successful mean in this context? We mean offering services that are heavily utilized by the university community and that have consistent demand year over year. We also mean successfully—and *creatively*—communicating our expertise to key stakeholders and decision-makers in environments that may be lukewarm to our efforts while delivering outcomes that meaningfully impact the research community in terms of increased access and dissemination of scholarly research. These four marketing strategies have three things in common: They are practical, relational, and strategic—which makes them applicable to any type or size of academic university regardless of geography. We hope this article is useful to professionals working in scholarly communications, offices of research and innovation, technology transfer units, and library administration who need to understand how the practice discipline of scholarly communications addresses the unmet needs of researchers and how it maps to various stakeholders within the university.

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## Context

The strategies discussed here evolved from case studies at Mississippi State University, Santa Clara University, and Appalachian State University. Using the Carnegie Classification of Institutions of Higher Education,<sup>2</sup> which uses a specific methodology to classify the level of research activity occurring within a university, Mississippi State University has R1 status, Appalachian State University jumped from R3 to R2 status in 2025, and Santa Clara University has R3 status. The student populations at these three universities give a general picture of the

size of these institutions: As of February 2026, Santa Clara University has approximately 9,700 students, whereas Appalachian State University and Mississippi State University are almost double this size, with approximately 21,700 and 23,500 students, respectively. Collectively, these universities represent a diverse geographical presence within the United States. Santa Clara University is situated on the West Coast, just outside of San Jose—a major global tech hub in the heart of Silicon Valley—and is known for uniting technological innovation with a commitment to social justice informed by the Jesuit educational tradition. Mississippi State University is located in the East South Central part of the United States and is a public land-grant research university with notable programs in agricultural science, engineering, and veterinary medicine. Appalachian State University is located in the rural Appalachian mountain region on the East Coast of the United States and is noted for its leadership in sustainability, environmental studies, and Appalachian culture. This context is provided to show that the following four marketing strategies are broadly applicable to a wide range of populations and research environments.

## Successful Marketing Strategies for Scholarly Communications

The four marketing strategies we share here focus on (1) repairing relationships and identifying gatekeepers, (2) correcting myths and misconceptions, (3) developing indispensable services, and (4) finding partners with shared interests.

### ***Repair Relationships and Identify Gatekeepers***

Library professionals working in academic environments recognize the significant impact of positive relationships with faculty and departments. Unfortunately, it is not uncommon for tension created by a predecessor in a scholarly communications role to be transferred to the successor, particularly in the absence of existing stable relationships with campus groups. This dynamic results in librarians inheriting departmental mistrust and encountering obstacles in forming connections, as they must rebuild relations rather than maintain them. Relationships may deteriorate as a result of past negative incidents or due to neglect stemming from staffing and resource constraints. For example, academic libraries experienced significant losses of senior librarians through mass retirements during the COVID-19 pandemic, and the subsequent reduction in outreach was evident across campus as remaining staff worked to maintain operations.

To rebuild damaged and neglected relationships, librarians must first identify key *gatekeepers*. Within organizational contexts, gatekeepers are individuals who possess formal or informal influence over access to information, networks, or decision-making processes.<sup>3</sup> Their roles often position them as intermediaries who can either facilitate or hinder communication and collaboration between groups, making their engagement particularly important in relationship-building efforts. Gatekeepers may include department staff and managers, teaching or research faculty, department heads, and deans. Reestablishing relationships requires a strategic approach, and gatekeepers

should be regarded as potential allies rather than barriers to connections. In situations where prior incidents have resulted in stakeholder wariness toward the library, gatekeepers can be a powerful asset in communicating service improvements.

As with any damaged relationship, immediate repair should not be expected. Consistent presence and availability can gradually foster receptivity among gatekeepers and the broader community. One strategy for demonstrating commitment to restoring and building relationships early in the process is to ensure that library resources are updated and accessible. This may include updating, creating, or archiving library guides; reevaluating accessible language on digital repository agreements; or creating resources that clearly communicate where and what kind of research support is available to faculty and students. This process also sheds light on areas of relationship friction that require improvement.

As noted previously, sustained professional engagement is essential. Securing opportunities to speak at department meetings or arranging individual appointments with gatekeepers is advisable. Emphasis should be placed less on memorization of names and more on clear and direct communication and conveying that you want to rebuild partnerships. If securing meeting times proves challenging, consider attending events that are being held by faculty departments or specialized institutes. This strategy requires additional capacity because you will need to stay aware of events happening on your campus and maintain flexibility in your schedule to accommodate attendance. Rebuilding relationships is inherently challenging. However, attending events hosted by groups you want to reconnect with and engaging in professional dialogue with attendees demonstrates commitment to relationship repair.

### **Correct Myths and Misconceptions**

When scholarly communications teams are formed with a mix of new and veteran librarians, there is a learning curve for navigating the minefield of local challenges that may be deeply ingrained in the university community. Some of those local challenges stem from circumstances external to the library and outside of the library's control, such as budget constraints that limit a library's ability to purchase resources. On the other hand, there may be negative feelings toward the library due to the tense politics surrounding a library's decision to spend money on technology and space renovations rather than book and journal subscriptions, which might lead to the misconception that libraries do not care about faculty research. In these difficult situations where strong opinions and preconceived misconceptions seem to impede working relationships and stultify communication with the faculty body, how do scholarly communications professionals successfully advertise and provide services?

One strategy is to use every interaction with campus stakeholders as an opportunity to project warmth, competence, and camaraderie. By pursuing human connections that leave long-lasting positive impressions, these micro-interactions will eventually break down barriers and address myths and misconceptions about scholarly communication services and, more broadly, the library's role in the university community. Some examples of positive micro-interactions include meeting stakeholders in person whenever possible, looking at a faculty member's research and teaching expertise to find common ground that you can connect to on a personal level, and being curious about their research agenda. For example, what do their bibliometrics look like? What do you find interesting about their work? What potential impacts might their work have on your own work? What makes it difficult or easy to communicate with people within and outside the field? Discussing your own published research with the faculty, students, and the administration also builds common ground and is a helpful way to illustrate your expertise in scholarly communications as a research practice and to demonstrate your professional competence.

Another strategy to address myths and misconceptions about the value of scholarly communications services is to come to every interaction armed with data and resources. Topics to discuss with stakeholders might include the following: How many items does the institutional repository hold, and where does its traffic originate? What legal or legislative challenges are currently influencing the scholarly publishing landscape? How do new federal agency mandates influence data sharing? How long can PDFs stay intact and usable on a CD-ROM? This is information that stakeholders are unlikely to know but will be glad to learn. Communicating this information in a way that is accessible is also important, so it's helpful to create and share a glossary that defines scholarly communications concepts to ensure there is shared understanding during conversations with stakeholders.

Taking the initiative to spark conversations with faculty members is another underutilized strategy for marketing scholarly communications services, especially in environments where there are negative misconceptions about library services. Some suggestions include the following: Monitor databases for new faculty publications, then reach out to congratulate faculty authors with a personalized message; watch departmental websites for new faculty hires and take the time to introduce yourself; and if a faculty member has taken advantage of a read-and-publish agreement, send an email to express gratitude while also copying their department heads and the relevant subject specialist librarian. These small, seemingly insignificant gestures of recognition and appreciation make a tremendous difference in communicating the library's interest in supporting faculty research and the desire for scholarly communications professionals to make a personal impact to advance the profile and reputation of a scholar.

### ***Develop Indispensable Services***

Another way to capture the attention of the university community is to develop scholarly communications services that are indispensable. How do we define 'indispensable' here? We're talking about services that present tremendous value to researchers, are not offered anywhere else, and are delivered with exceptional customer service. Before this goal can be achieved, the scholarly communications professional must have a strong understanding of the specific needs of researchers at the university, which can be accomplished through conducting a needs assessment, gathering survey data, or soliciting individual feedback from faculty members. Finding out how scholars would like their research to be communicated and disseminated and whether they understand the benefits of open access is important information to gather.

Creating an indispensable service starts with identifying and building a community of individuals with similar needs and frustrations so that scholarly communications professionals can design a unique solution. In-depth conversations with faculty members may reveal deeper needs and, more importantly, the reason behind those needs. One frustration might be that faculty members generally want to share their scholarly work and be cited more frequently, yet family obligations and work schedules may prevent them from doing so. Moreover, the data-entry process for institutional repository deposit may be too slow, meticulous, and time-consuming. Alternatively, some faculty members might lack the technical skills to navigate a new platform or the patience to manually upload their scholarship. Learning this type of information typically requires meaningful follow-up with faculty members; therefore, it's important to remember that online workshops, news announcements, and other digital advertisements may only retrieve a superficial layer of information that does not fully surface the extent of community needs.

Developing indispensable services to address the unmet needs of the research community requires going above and beyond the status quo and building momentum by generating a level of excitement about the benefits of a particular service. One example might include creating digital

research profiles on an institutional repository platform, along with offering to upload all scholarly content on a faculty member's curriculum vitae. Making this service as simple as possible is a critical recommendation: The only requirement involved here would be for faculty members to send their résumés to the scholarly communications office—a simple step that would involve very little effort or time. Taking the burden of digitizing a research agenda off a faculty member's plate should be a relief, and many faculty members will be pleased with their new digital presence, which allows them to more easily share their scholarship with the world. There are also mutual benefits for the scholarly communications office. For example, each curriculum vitae received from faculty members translates into a potential parabolic increase in ingested content for an institutional repository, which increases the research profile of the university.

Communicating success stories is also a strategy to build momentum for indispensable services. For example, offer workshops for faculty that illustrate real-world examples of institutional repository research profiles and the ways that an online presence can generate research metrics, such as views, downloads, and citations; demonstrate the ease of sharing links to an institutional repository research profile with tenure and promotion committees, prospective publishers, and grant funding agencies; and explain that Google Scholar has the ability to scrape institutional repositories for scholarly content and disseminates research beyond the scope of an university's internal scholarly network.

Ultimately, creating indispensable services resolves the unmet needs of researchers and offers high-value solutions that have the power to build meaningful relationships across the university. As scholars at Harvard Business School note, "Exceptionally great experiences stand out, create memories for years, increase loyalty, and lead to a massive multiplier effect when one customer shares the details with others in today's super-connected consumer world."<sup>4</sup>

It's worth mentioning that offering these types of indispensable services comes with challenges, including the dedication of more staff time, for example, to support increased institutional repository processing and data entry. To mitigate the additional strain on workloads, scholarly communication offices might investigate whether there are artificial intelligence (AI) tools or new functionality offered by third-party-hosted institutional repository platforms that can autogenerate this data and summarize scholar profiles more efficiently.

### ***Find Partners with Shared Interests***

Another successful marketing strategy that scholarly communications professionals should consider is finding partners, sponsors, and advocates who share similar interests and goals. Building strong professional relationships with these individuals over time can give your own marketing efforts a multiplier effect. With this network of support, there are opportunities to reach new audiences, pool resources, and leverage the reputation and credibility of other well-established, well-respected groups. This partnership strategy is crucial for scholarly communications offices that might be overextended or have smaller teams.

Some examples of potential partners include the office of research and innovation, the center for teaching and learning, the university research council, the university intellectual property council, the honors college, the graduate school, research centers, specialized institutes, and laboratories. While some of these groups have personnel and budgetary support, others may be less resourced. Regardless, within each of these networks are other relationships and networks that can spread the word about the value of scholarly communications events and services. Understanding and building these networks is critical, and that requires establishing trust.

One way to develop trust is by engaging in successful, co-branded, mutually advantageous collaborations. For example, consider co-sponsoring a scholarly book publishing program with the office of research and innovation to reach science, technology, engineering, and mathematics (STEM) departments, which might be typically less active in scholarly communications activities or may need more information on data sharing or federal funding agency mandates. Alternatively, consider co-hosting a writing retreat with the writing center and the center for teaching and learning to support faculty writing groups that might be decentralized across campus, underresourced, and in need of support for navigating scholarly publishing and open-access licensing.

Other potential partners and advocates that might be overlooked yet have the potential to serve as fantastic champions of scholarly communications services include administrative assistants, business managers, the information technology services team, the office of research and innovation, the graduate school, and other staff members on campus. Consider hosting informal lunch gatherings with these individuals to nurture professional connections, understand where joint efforts can be mutually beneficial, and develop insight into the unique internal workings of the university. For example, meeting regularly with the office of sponsored programs might shed insight into the opaque nature of grant management processes. Staff members also often have more routine interactions with faculty because they are the first point of contact for many of the day-to-day operations within the university. These individuals therefore have more opportunities to provide positive referrals and validate the credibility and value of the scholarly communications office.<sup>5</sup>

## Conclusion

In our experience, marketing scholarly communications is practical, relational, and strategic. It's also an activity that requires research, promotion, partnerships, and those timeless elements of being human—connection, understanding, and personal interaction—especially in a world where AI seems to permeate many aspects of life. Whether starting your own scholarly communications program or reviving a stagnant one, we recommend offering repair for any negative relationships and identifying the gatekeepers who might be holding you back, correcting myths and misconceptions that might be confusing your audience or derailing your professional relationship-building efforts, developing indispensable services with excellent customer service, and finding partners with shared interests who can champion your efforts.

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## Feature

# From Theory to Practice

## Implementing a Mission, Vision, and Values Statement to Support Change in an Academic Library Liaison Program

Kristy Padron and Patricia Fiorillo

### Abstract

Academic library liaison programs historically varied in their functions and adapted to their organizational needs and priorities. This case study examines the integration of a mission, vision, and values statement into the liaison program at Florida Atlantic University Libraries. Originating from business and organizational theories, these statements have been adopted by nonprofit organizations, including academic libraries, to guide administrative processes and services. The study highlights a re-visioning of an established liaison program during a period of transition. This fostered a shared understanding of the library's priorities and documented its goals and objectives. This alignment was particularly crucial as Florida Atlantic achieved the Research Intensive (R1) classification, necessitating adaptations of liaison roles. The creation of the mission statement facilitated employee buy-in and continuous feedback through input from librarians and administrators. Additionally, the statement played a vital role in supporting the morale and well-being of the librarian liaisons, ensuring their concerns were understood and addressed. This collaborative approach supported the liaison program's evolution in response to institutional changes.

### Background

Liaison programs have long existed in academic libraries but with varying names and descriptions. They are described in general or focused terms and possess roles that depend on the operational needs and priorities of a given library. Mission, vision, and values statements originated in business, management, and organizational theories and applied these theories to an organization's operations. They were initially used by for-profit businesses and were gradually incorporated into higher education and then into academic library settings, many of which are nonprofit organizations. Mission, vision, and values statements have been applied to academic library settings for administrative and organizational processes.

### History of Liaison Work

In the 2020s, libraries have faced severe budget cuts, shrinking departments, disinterested or overworked populations, rising expectations from an on-demand culture, and burnout, all of which have prompted calls for change.<sup>1</sup> Some advocate for increased connection through embedded librarianship within the liaison model, whereas others support functional models that move away from traditional liaison programs. Embedded librarianship fosters closer relationships with faculty by ensuring liaisons are consistently available but is effective only when assigned to a single department.<sup>2</sup> Functional models alleviate some burdens by focusing on library functions rather than subject specialization. Hoodless and Pinfield identify factors driving this change, including ensuring

service consistency, acquiring new expertise, improving efficiency, instigating cultural change, aligning with university strategy, and responding to budget constraints.<sup>3</sup> Some libraries have returned to the liaison model, whereas others resist restructuring, fearing that functional librarians are less effective in building strong relationships with faculty. Many libraries have adopted hybrid approaches to suit their communities' unique needs.<sup>4</sup>

The importance of liaison programs as the face of the library cannot be understated. Libraries provide vital information and resources for research, and the liaison model remains necessary.<sup>5</sup> There continues to be a disconnect between library resources and the library itself, with liaisons offering an essential connection. However, expectations and demands have changed. A 2019 study found high burnout among liaison librarians, particularly manifesting as emotional exhaustion and depersonalization.<sup>6</sup> This suggests a lack of fairness and connectedness, adding to the stress of a heavy workload.

Liaisons need more support to carry out their duties efficiently. Many articles offer guidance on enhancing programs and connecting with faculty but lack specifics on measuring progress, aligning activities with academic goals, or defining success.<sup>7</sup> Most focus on outward effects and success but not the inward impacts on librarians. No articles mention a support system or internal infrastructure to guide liaisons, which could help mitigate stress and burnout. New programs need supporting infrastructure to succeed and provide a cohesive sociocultural and political system.<sup>8</sup> These needs and a discernible gap in the literature suggest that including a mission, vision, and values statement in a liaison program can be used to address its objectives; define roles; and be a means of alleviating changing library resources, role expectations, and organizational priorities.

## Origin of Mission Statements

Management experts define mission statements as important starting points to guide organizational decision-making and strategic planning.<sup>9</sup> Each part of these statements communicates important aspects of an organization's underlying purposes, goals, and priorities. The mission statement conveys the scope and character of an entity and justifies its existence. The mission also defines whom the entity serves, the results of the services provided, and what distinguishes an entity and an offered service from others like them. A vision statement describes an entity's aspirations and how achieving them will transform the organization. Unlike the mission statement, a vision statement can change with an organization's priorities. Values, or the final part of the statement, articulate the organization's core principles, with the purpose of guiding its decision-making, particularly when few precedents or examples to follow are available.

Mission statements apply scientific management and strategic management theories. Frederick Taylor's scientific management theory structured work functions and employee roles into hierarchies. Scientific management theory defined employee job functions and processes to minimize and resolve conflict between employees and managers. With its origins in the late nineteenth century, Taylor's theory continues to influence present-day management theories.<sup>10</sup> In the 1960s, strategic management theory used elements of scientific management and then considered an organization's internal and environmental factors for planning and creating its processes. This theory examined organizational roles and functions, along with an organization's services, markets, technology, and internal and external relationships. The purpose was to provide tools for managing increased organizational complexity and uncertainty. Management experts currently believe strategic management is highly relevant for organizations because many

operate with frequent disruption and discontinuities;<sup>11</sup> academic libraries can be easily argued as organizations with these attributes.

Mission statements were first implemented in business and were gradually adopted in the nonprofit sector. They are essential to nonprofit organizations for defining their roles, services, goals, and partnerships.<sup>12</sup> Management expert Peter Drucker concluded that missions strongly influence the function and success of nonprofit organizations. He believed they enable nonprofits to generate ideas, implement their services, and identify additional measures of success, adding that for-profit businesses can learn from the nonprofit sector's mission-driven focus.<sup>13</sup>

***Benefits and Critiques of Mission Statements.*** Many studies suggest that mission statements have a direct, positive impact on an organization's performance when the mission emphasizes who is served and is intentionally assimilated into an organization's functions.<sup>14</sup> These effects are pronounced when the statements identify an organization's values, beliefs, purpose, competencies, and distinct characteristics. Mission statements also have internal organizational benefits. They provide a structure for employees to follow when carrying out their duties and define shared values and the means to fulfill organizational goals.<sup>15</sup>

Mission statements are often criticized for not being integrated into an organization's operations or not communicated to employees and external stakeholders. They can sometimes lack clarity or relevance to an organization or be viewed as too prescriptive in limiting employee roles and actions.<sup>16</sup> Researchers have not established a causal relationship between the use of mission statements and organizational outcomes, but they are sure of an association.<sup>17</sup>

***Use of Mission Statements in Academic Libraries.*** Academic libraries have used strategic planning since the 1960s, and its use increased in the 1980s as a result of disruptions from the use of new technologies, budget reductions, and expectations to do more with fewer resources.<sup>18</sup> The academic library literature provides many case studies and a few qualitative studies on mission, vision, and values statements in college and university libraries.

One qualitative research study analyzed the mission statements of recipients of the Association of College and Research Libraries (ACRL) Excellence in Libraries Award. Baker concluded that missions describe a library user's multifaceted needs within an academic setting and can set a library apart from others. Baker and other researchers believe libraries use their missions to demonstrate their willingness to participate in and support their organizations, and to maintain their relevance and secure continued support.<sup>19</sup>

One multiple-case study investigated how academic libraries used strategic planning to make organizational decisions. Casey found that libraries used planning and mission statements to guide them through disruptions such as job role changes and reassignments, construction or renovation projects, and leadership transitions.<sup>20</sup> Notably, one of the libraries in Casey's study included its liaison program in its mission statement. The program's roles were defined through the document. The document also supported the library's new vision and anticipated ways to meet the needs of library users and its stakeholders.

Mission statements have been used by library departments. Georgetown University librarians created a core competency statement that was later included in a department-level mission statement when its research and instruction department merged with its collection development department. The document was purported to create shared understandings of the new department and communicate its roles within the library and its university while also linking core librarian competencies to the library's strategic planning.<sup>21</sup>

## Case Study: Academic Liaisons at Florida Atlantic University Libraries

Florida Atlantic University (Florida Atlantic) is a public, doctoral-granting higher education institution located across three counties along the southeastern coast of Florida. It has over 32,000 students and 3,371 faculty and staff personnel.<sup>22</sup> Its main library is located on the Boca Raton campus, and two additional libraries are available at its partner campuses in Jupiter and at Harbor Branch Oceanographic Institute in Vero Beach. Its University Libraries employ sixty-eight people, twenty of whom are nontenured faculty librarians and forty-eight of whom are staff members.<sup>23</sup>

Before the Florida Atlantic University Libraries had its liaison program, library outreach was done individually by librarians, who frequently interacted with university faculty and students or had outreach in their job assignments. Other librarians based their outreach on their collection management duties for assigned colleges or departments. Librarians frequently reported their outreach in their annual activity reports, but these activities were not subject to other types of review or approval in terms of what they distributed. Although librarians informally shared information with each other, some thought that having a common message and following the university's and libraries' branding would provide a standardized, professional voice that had the input of other library units, including their administration.

The libraries liaison program originated from a project undertaken by two librarians in a leadership development working group. The librarians envisioned creating a cohesive approach and structure for promoting the libraries' services, collections, and events. Although the leadership development working group was disbanded, one of the librarians, a research and instruction services (RIS) librarian who had been assigned outreach responsibilities, continued the project with the approval of the library's administration. Two other RIS librarians joined the project the following year.

The team of librarians reviewed the existing literature, including working papers by the Association of Research Libraries (ARL) about academic liaison programs. It studied the liaison structures of peer institution libraries. The team members also examined their observations about library outreach and compiled their colleagues' ongoing questions and concerns, which included the following:

1. Delineating the expected roles and responsibilities of liaison outreach
2. Describing broad activity areas through which liaisons would provide services or share information, such as collection management, instruction, and research or information services
3. Providing recommendations for librarians to optimize their outreach to university faculty and departments
4. Suggesting ways university faculty can engage with the libraries.

The result was the document "Academic Liaisons Working Draft," which put forth a structure for the libraries' liaison activities.<sup>24</sup> The document included input from the library administration and department heads. It outlined an approach to promoting library services that were directly relevant to the university from library departments such as scholarly communication, digital libraries, and collection management.

The liaison document was not officially finalized, but the library administration followed its recommendation to have one liaison coordinator. Coordination was assigned to a collection

management (CM) librarian who was hired soon after the document's completion. The document was provided to the CM librarian, who adopted most of it to structure liaison activity for the duration they served in that position. At that time, liaisons were RIS librarians, and one was from the digital library department.

## Transitions in the Liaison Program

Many changes in administration and personnel occurred within the library after the initial academic liaison draft. The first was the formation of the libraries' external relations department. Although the new department was responsible for coordinating library events, public relations, and branding and marketing, it did not subsume all outreach done by liaisons. The liaison coordinator collaborated with the new department to create campus announcements and social media posts, make collateral such as flyers, and promote library events. Liaisons adopted unified approaches in their messaging and regularly promoted many library events and services to their contacts while also customizing their messaging for their respective disciplines. For example, a science, technology, engineering, and math (STEM) librarian could promote library services and events they knew were directly relevant to the students and faculty in those areas while minimally promoting services and events that were not.

A new dean of libraries was hired and brought a new vision for the library. They wanted to further mobilize the liaison program and redefine librarian roles to support the university's goal of attaining the Research Intensive (R1) level of the Carnegie Classification of Institutions. The dean envisioned increasing engagement levels between librarians and university faculty, specifically to where librarians provided higher levels of research and information support to departments. The dean wanted liaison librarians to continue to regularly promote library events and services, such as the launch of its new institutional repository. In addition, the dean increased the participation of other librarians as liaisons. Fewer librarians were available to serve as liaisons as a result of reassignments and resignations; in addition, hiring was done very slowly because of flat library budgets, increasing electronic resource subscription costs, and human resource policies. From that point, all librarians were assigned to be liaisons, including those who had not done outreach. Additional personnel transitions affected the liaison program. After the resignation of the CM librarian who was the liaison coordinator, a new RIS librarian was appointed to coordinate. The lead author of the liaison document was reassigned to an interim library administrative position. These multilevel organizational changes led to updates in the liaison program and its document to reflect the libraries' new objectives.

## Steps Taken in the Re-Visioning Process

A primary concern of the interim administrator and liaison coordinator was creating and supporting a new team of liaison librarians who were taking on unfamiliar roles, particularly in outreach. The administrator and coordinator considered the impact of these changes on librarians in terms of their workloads and adapting to the new expectations, as well as their effect on individual and overall morale. A second concern was communicating the purpose and value of the liaison program to the new liaisons while also providing updates and clarifications for experienced liaisons. The interim administrator and liaison coordinator, with guidance from the dean of libraries, worked together to implement updates in the liaison document and program. They incorporated the knowledge from the previous liaison program and continued to use the academic liaison final draft to guide updates.

***Environmental Scan of Liaisons.*** The initial step in revitalizing the liaison program involved understanding the needs of the liaisons. To ascertain the expectations of the liaisons, an informal survey was conducted to perform an environmental scan. The survey results were consistent with existing literature, indicating that liaisons required additional support to take on the new roles. When asked what the liaisons would like to see, comments ranged from “a place to feel comfortable for liaisons to come together and discuss ways to be a good liaison . . . there can be monthly talking points or people just come with grievances” to “hire more reference librarians instead of putting this on overworked librarians you already have.” Other liaisons commented that there was no definition and too many gray areas between what they typically do and liaison work. The liaison program needed a more defined purpose and a clearer understanding of the roles.

The environmental scan provided additional insight into librarian liaison concerns. All liaisons expressed concerns about the workload involved with the additional assignment, given the uncertain nature of those duties. New liaisons expressed uncertainty about their roles, raising questions about teaching responsibilities, outreach, event participation, and overall expectations. Even those with extended tenure at the libraries, but who were new to liaison work, were unclear about the objectives they were promoting. Feedback from experienced liaisons highlighted the need for resources such as flyers, videos, and library promotional materials. The experienced liaisons also wanted a greater voice in giving input into external communications. The survey revealed that liaisons needed professional development retreats or workshops to clarify roles and responsibilities, regular feedback sessions to address concerns and provide guidance, access to marketing materials such as brochures and digital content to aid in outreach efforts, and increased involvement in decision-making processes to ensure their voices were heard.

***Inclusion of a Mission, Vision, and Values Statement.*** In response to the concerns of liaisons and to provide additional structure to the liaison program, the survey results led to the addition of a mission, vision, and values statement to the academic liaison draft. The interim library administrator thought communicating the purpose of the program (mission), its aspiration (vision), and core guiding principles (values) would answer many questions about the liaison program’s purpose, especially to those new to the role. Because the administrator saw many changes in the library during their career, they thought the statement could provide guidance for future or unforeseen changes to liaison activities. This insight guided the redevelopment of the liaison program and the subsequent addition of a mission, vision, and values statement that served as a guide to help build the infrastructure that would support the liaisons’ needs, outline the program’s values, and define the priorities set forth by both administrative staff and the liaisons.

The subsequent step was to align these needs with the expectations of library administration, particularly with the administration’s vision for liaisons to engage in more outreach, build closer relationships with faculty in their subject areas, and continue to collaborate with the external relations department to promote the library. The initial mission, vision, and values document was created and incorporated the dean’s feedback. The final draft was presented to the liaisons, who then had the opportunity to review it and offer feedback. Once feedback had been integrated, the final copy was stored in a central access point, a liaison Microsoft Teams folder where all liaison documents, including flyers, email templates, and other pertinent information, were stored, along with the original version of the academic liaison draft. The updated document was also reviewed at the liaison retreat, where further discussion took place.

## Launching Updates in the Liaison Program

The liaison program had a soft launch of its changes when the coordinator started their role. The first major decision was to institute one in-person meeting per month. Initially, two liaison meetings were scheduled per month; however, this frequency was seen as burdensome to many liaisons. In response, the liaison meetings were dropped to one per month. The monthly in-person meetings at the main campus library were instituted with the goal of advancing participation and feedback from the liaisons, particularly with the addition of new librarian liaisons. Previously, liaison meetings were conducted online via Teams or Zoom, which resulted in low participation. Despite their initial unpopularity, the in-person meetings have proven to be a more effective forum for liaison engagement. One liaison is exempt from the meeting requirement because their primary assigned location is at a partner campus, and this liaison participates by videoconferencing. The meetings provide liaisons with opportunities to connect and offer feedback. The absence of recorded meetings creates a more open environment for liaisons to express their concerns. Annually, a survey is distributed to all liaisons to determine the most convenient day and time for future meetings and get liaison feedback and suggestions for the overall program.

The second change to the program was to use meetings to clarify the roles and responsibilities of a liaison. This was done by providing professional development. One priority was to increase liaison knowledge of the library's information sources and services. The liaisons would be aware of the library's resources that support their subject areas and then promote this information to their departmental contacts. New liaisons were introduced to the sources, whereas experienced ones received updates. Although vendor database demonstrations do not always occur during liaison meetings, liaisons are highly encouraged to attend them. For example, liaisons were invited to meet Sage's sales representative, who introduced the company's recent and extensive database rollout. A second priority of professional development was for liaisons to identify and learn about research emphases within their departments. Finally, librarians and other guest speakers at liaison meetings discuss general library topics like scholarly communications and the research life cycle that undergird all the university's disciplines. Liaisons can then explore how these topics apply to their respective areas of assignment.

About six months after the soft rollout of liaison program updates, a half-day liaison retreat was organized. It served dual purposes: It functioned as a professional development training session and marked the launch of the program's mission, vision, and values statement. To introduce the mission statement, liaisons were assigned articles to read beforehand that were specifically selected to support the program and the inclusion of the mission, vision, and values statement. The articles helped clarify roles and expectations but also opened the discussion to what is practical when building relationships with departments and faculty. These subjects, along with the mission, vision, and values statement, were the primary focus of the liaison retreat.

**Initial Responses.** According to initial liaison feedback, the liaison best-practices document and the library's mission, vision, and values statement offered guidance, but they weren't always practical. Some liaisons thought they were out of their comfort zones or that the suggested activities did not fit into their schedules in terms of time. It was pointed out that because liaisons have many areas to cover, they might not be able to reach out on either a weekly or monthly basis to their faculty as suggested. In fact, it was suggested that this might function as a detriment to building a relationship for some faculty. However, it was generally agreed that liaison work should be approached as a relationship rather than the more traditional transactional approach. The shape the relationship takes is entirely up to the liaison. The best practices and mission statement were suggested to be a guide for setting priorities or goals instead of a specific set of tasks to complete.

The primary objective of the mission, vision, and values statement was to establish a foundational framework for the program. This objective has been successfully achieved, as the statement set the standards upon which the program could be developed. It recommended best practices for liaisons who operate in various roles beyond their liaison duties and advocated for a more collaborative approach to liaison work. These foundational principles facilitated the implementation of secondary goals, which included alleviating liaisons' concerns regarding anticipated workloads, setting clear expectations, and establishing quantifiable goals for the future.

Through enhanced collaboration and cohesion, workloads were effectively reduced. Liaisons were provided with "plug-and-play" branded collateral and library promotional content from the external relations department and had autonomy to adapt them to the needs of their liaison areas. Additionally, the mission, vision, and values statement emphasized that the relationships between liaisons and their respective departments are unique to them, ensuring that no individual would be evaluated based on another's performance. The collaborative environment also provided liaisons with the opportunity to express concerns or opinions, thereby mitigating the risk of burnout. Furthermore, the statement aligned the program with the overarching goals of the library and the university, which aim to provide academic support and foster exploration within a research-intensive setting.

Informal feedback from liaisons indicates that the program and the mission, vision, and values statement have been well received. Many expressed thanks or happiness with the direction the program is headed. A formal anonymous survey will be distributed to gather more comprehensive feedback on areas for improvement and aspects that are functioning well. Informal feedback from the dean of libraries, library administrators, and other departments suggests the liaison program is progressing in the desired direction. Nonetheless, there are areas for improvement, particularly in fostering greater collaboration between the library and faculty members so that they go beyond transactional interactions and toward relationship building.

In this case study, Florida Atlantic University Libraries coupled a mission, vision, and values statement with its existing liaison program documentation, with the purpose of orienting its new liaisons to the program's underlying goals and objectives. The new document provided liaisons with valuable guidance for their new role and created a foundation for a reenvisioned liaison program. It contributed to creating a shared understanding of the library's priorities and, in the process, documented the library's culture and defined its goals and objectives.<sup>25</sup>

The mission statement was also used for internal purposes to guide the liaison program in adapting to frequent changes within the library and the university. The processes of identifying the program's primary groups served, listing its priorities, and defining its vision were intended to facilitate additional discussions or actions that would need to take place. This will be very important to guide the liaison program because Florida Atlantic University attained the Research Intensive (R1) level of the Carnegie Classification of Institutions about six months after the mission statement was completed. In the future, liaisons may find that they have redefined roles and will deliver new services that align with those offered by other R1 libraries.

The liaison program's mission statement followed a recommended practice by including internal stakeholders in its creation and having employee buy-in.<sup>26</sup> The libraries' administrators provided input throughout the process, and the new and experienced liaisons alike had opportunities to provide input to the statement. As a result, further changes were made to the liaison program, and the coordinator continues collecting feedback throughout the year.

## Recommendations

In the past, liaison work traditionally focused on assigned subject areas for CM and less on instruction and outreach, but it gradually incorporated the latter areas in response to the breadth of changes in academic libraries. Although the Florida Atlantic University Libraries liaison program was intended to adopt these three broad areas, its current focus remains on collections and outreach. One reason is that novice librarians, or those with specializations apart from traditional liaison or instruction duties, need guidance via mentoring and professional development activities to transition into these roles. Liaisons will also need time, both in their work schedule and as they gain experience, to attain new skills and confidence levels. Although a mission statement can communicate a library's or program's priorities, it will need to be complemented with additional support in terms of time, resources, and professional development.

One recommended action for the libraries' liaison program mission statement is to use it to create quantitative measures of the program's services. This will help the program demonstrate how its services are operationalized within the library and university.<sup>27</sup> These measures can be used for evaluative purposes so that the strengths, challenges, and gaps of the program can be identified, leading to refinements to the liaison program. Finally, measures of liaison library services can strengthen the library's advocacy efforts. These measures can present objective descriptions of who the program serves and the impacts of its service. Wadas stated that libraries are vulnerable to losing support from their parent organization if they do not articulate their contribution to the organization's mission and if their organizational goals are not known.<sup>28</sup> In addition, libraries are increasingly operating with fewer resources, coupled with higher expectations, so they must be good stewards of their limited resources.<sup>29</sup> A mission statement with measurements derived from it can address these concerns.

Although higher education accrediting agencies require institutions to have mission statements to attain accreditation, an academic library is not required to have one as part of its parent organization's accreditation process.<sup>30</sup> Any academic library, or its departments or programs, can use a statement for external purposes to document their fit, alignment, and support of their parent institution. For internal purposes, a mission, vision, and values statement can support librarian liaisons in managing the frequent changes in their library resources, work assignments, staffing, and organization. Academic libraries should consider applying and integrating tools such as mission statements to facilitate the many changes they have experienced and will continue to experience in their organizations. Most importantly, these tools can be used to support the well-being of librarians and staff so that they can continue to provide library services and demonstrate their value to their colleges and universities during times of change.

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Feature

# Investigating Proactive Chat

## Exploring Potential Users and Accessibility

Laura Costello, Kate McManus, and Han Wu

### Introduction

While libraries have long offered virtual reference chat as part of a diversified reference model, the COVID-19 pandemic made this service the primary way for users to connect with many libraries.<sup>1</sup> Proactive chat is an option for virtual reference service (VRS) that pops up in the user's browser after a set amount of time. In contrast to static chat widgets, the proactive chat widget uses a pop-up action to invite the user to chat with a librarian rather than relying on the user to initiate the chat from a static page. Proactive chat can help drive use of library VRS, but at the University of Minnesota and in other libraries, concerns around volume, desirability, and accessibility prevent implementation of this VRS function. This article examines two major areas of interest in implementing proactive chat at the University of Minnesota: (1) investigating user impressions of current static chat widgets and (2) testing proactive chat widgets and triangulating the testing data with an investigation of the user experience and accessibility of Springshare's LibAnswers proactive chat widget. Through qualitative focus groups and documentation review, we sought to understand whether implementing a proactive chat widget would be feasible and welcomed by users at the University of Minnesota. Toward this end, we integrated an undergraduate coinvestigator to help collect peer data from our target user group for this study, University of Minnesota students. They served as a research partner and author on this project, assessing literature and interpreting data alongside the other coauthors of the study, who are practicing librarians at the University of Minnesota.

### Literature Review

Proactive chat has been shown to increase the volume of research questions posed to library VRS. In the literature, volume increases are diverse among single-institution studies and range between roughly doubling traffic<sup>2</sup> to much more significant increases of 300% to 600%<sup>3</sup> over static widget chat traffic. Hurley suggests that proactive chat is generally acknowledged to create "sudden, substantial, and sustained increases in the number of transactions" (87).<sup>4</sup> While some articles noted significant events that may have contributed to VRS traffic increases, such as the COVID-19 pandemic, there is also some evidence that the length of time that elapses before the proactive widget pops up on the screen, termed *launch time* or *trigger time*, can have an impact on the volume of chats received.<sup>5</sup> There is also evidence from the literature that rather than opening chat services up to more directional or informational questions, proactive chat actually increases the number and proportion of reference questions.<sup>6</sup>

Despite increases in the volume and complexity of chats in proactive environments and the indication that proactivity itself drives use in these environments,<sup>7</sup> proactive chat widgets have not been widely adopted. Some hesitations expressed in the literature include that these widgets may be “annoying”<sup>8</sup> or that interacting with the technology to silence unwanted chat pop-ups can be frustrating.<sup>9</sup> Imler’s usability study of proactive chat widgets found that library users generally felt that proactive chat would be a “welcome intrusion”<sup>10</sup> and that they would be more likely to use VRS with the proactivity function over a static widget. This reflects general findings about the priority of convenience as a factor for VRS use<sup>11</sup> and usability studies that have found that a large proportion of potential users of VRS do not know that it is a service offered by their library.<sup>12</sup>

Embedded in the conversation about whether pop-ups are annoying or distracting is the concern that proactive VRS widgets might present barriers to accessibility. Accessibility considerations have not been well discussed yet in the proactive chat literature, and concerns that may be particularly relevant to proactive features, such as their accessibility and desirability to neurodiverse users, are not yet well understood. Universal Design principles have been considered for these users,<sup>13</sup> but there are no broadly accepted specific standards, and initiatives in this area have not always been successful.<sup>14</sup>

A recent usability study conducted at Pratt University<sup>15</sup> investigated the language and positioning of the proactive chat widget and found that users were amenable to the proactive element, that users preferred clear language such as “live chat” or “ask a librarian,” and that the bottom right of the page was an ideal location for launching the widget. However, this study did not include an accessibility evaluation. Additionally, a study of the data from three institutions<sup>16</sup> found that most chats originated from the website or discovery layer and that resource-specific widgets (such as those from specific databases) had minimal interaction.

Longmeier and Foster found in their survey results that there was not a common organizational location for disability and accessibility services in libraries and that this work often fell to library employees who worked closely with users.<sup>17</sup> Roberson et al. also found that while students may feel comfortable disclosing to their university or college that they have a disability, a smaller percentage of those students ask for accommodation.<sup>18</sup> This research suggests that Universal Design, incorporating broad access into the design of something rather than relying on adapting existing systems, services, and spaces to accommodate users,<sup>19</sup> should be central to developing services for libraries where accommodation requests may not be reported or resourced appropriately to respond to requests as they are raised.

## Theoretical Frameworks and Positionality

The first two authors of this article are practicing librarians and VRS leaders at the University of Minnesota. The University of Minnesota is a large, research-intensive university in the Midwest United States. In the 2024–2025 academic year, the University of Minnesota enrolled more than 70,000 students, of which 56,666 (81%) were undergraduate students.<sup>20</sup> We recruited an undergraduate coauthor on this work who contributed to leading peer focus groups with other students, analyzing the data from focus groups collaboratively with other authors, conducting research into the literature, and reviewing the final publication. Because this study focused on technology practices and preferences of students at our institution, we felt that incorporating an insider perspective<sup>21</sup> would benefit our data collection and analysis. Drawing from literature around peer-interviewing practices in qualitative research,<sup>22</sup> we recruited a second-year undergraduate

student at the University of Minnesota working on a double major in computer science and economics as our coauthor.

Although this study does not focus directly on the content of VRS chat, the design of the study draws theoretically from the *Content/Relational Model of Success in Reference Encounters*,<sup>23</sup> which uses communication theories to help articulate models of successful reference encounters for both librarians and users from both content and relational perspectives. There is some evidence that proactive chat changes the relational nature of the VRS encounter because users “feel they’ve been invited to ask a question, rather than seeking out help” (99).<sup>24</sup> This framework, along with models of convenience in VRS,<sup>25</sup> contributed to the design of the study.

## Research Objectives

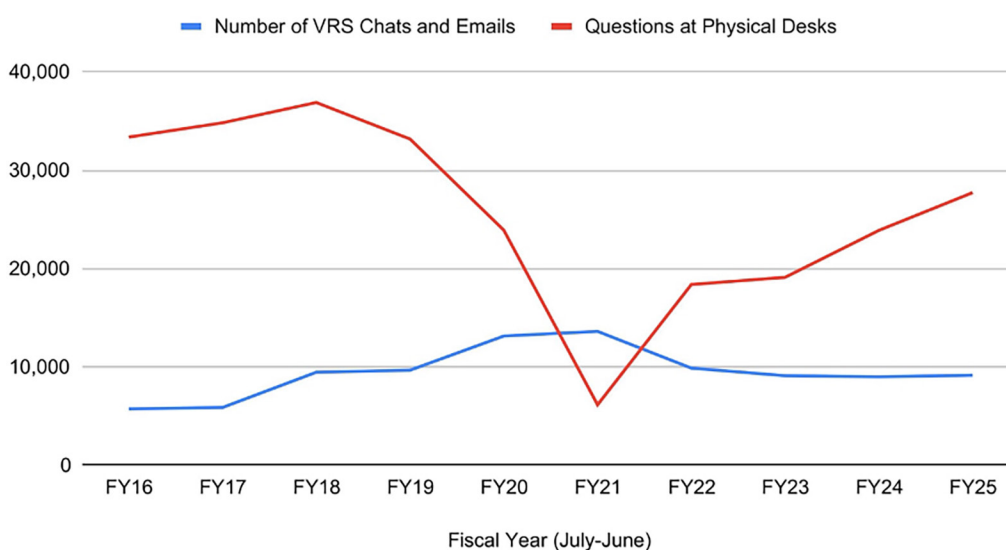
After the closures related to the COVID-19 pandemic in March 2020, the University of Minnesota saw an increase in chat usage on our website. This was part of a larger trend in academic libraries at this time.<sup>26</sup> At the University of Minnesota, chat volume tapered off after on-campus instruction resumed in the fall of 2020 and has continued on a downward trend. Table 1 provides trend data for the volume of chats received through the chat widgets on our website and discovery layer. Physical visitor counts collected at library gates are provided as a counterpoint to demonstrate the impact of the pandemic on physical space and VRS.

**Table 1.** Volume of Chats Received Through Univ. of Minnesota Chat Widgets

|                             | FY16   | FY17   | FY18   | FY19   | FY20   | FY21   | FY22   | FY23   | FY24   | FY25   |
|-----------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Chat and tickets            | 5,750  | 5,892  | 9,475  | 9,682  | 13,156 | 13,628 | 9,894  | 9,123  | 9,012  | 9,173  |
| Questions at physical desks | 33,367 | 34,819 | 36,882 | 33,172 | 23,908 | 6,169  | 18,388 | 19,122 | 23,891 | 27,728 |
| Combined gate counts        | 1.6M   | 1.5M   | 1.5M   | 1.4M   | 905K   | 143K   | 959K   | 1.2M   | 1.2M   | 1.3M   |

Figure 1 models and compares this data, where the impact of the pandemic, through reductions in physical visitor counts and corresponding increase in VRS, is clearly visible in the pandemic years

Annual VRS Volume and Questions at Physical Desks, 2016–2025



**Figure 1.** VRS chats versus in-person questions.

of 2020–2021. Physical visitor counts from 2023 to 2025 have not yet exceeded prepandemic numbers but have been trending upward from a significant decline during the pandemic. VRS counts represent only a slight decline from 2018–2019 numbers but remained relatively stable between 2023 and 2025.

Chat at the University of Minnesota is offered 24/7 through a collaborative reference model that includes our statewide cooperative (CO-OP) and the Springshare Global Chat Cooperative. VRS is provided through Springshare's LibAnswers. At the time of this study, our static chat widget was in the lower right-hand corner of the screen, a small green box that says "24/7 chat." Figure 2 shows a screenshot of the home page of the University of Minnesota Libraries, with the green static chat widget in the bottom right corner.

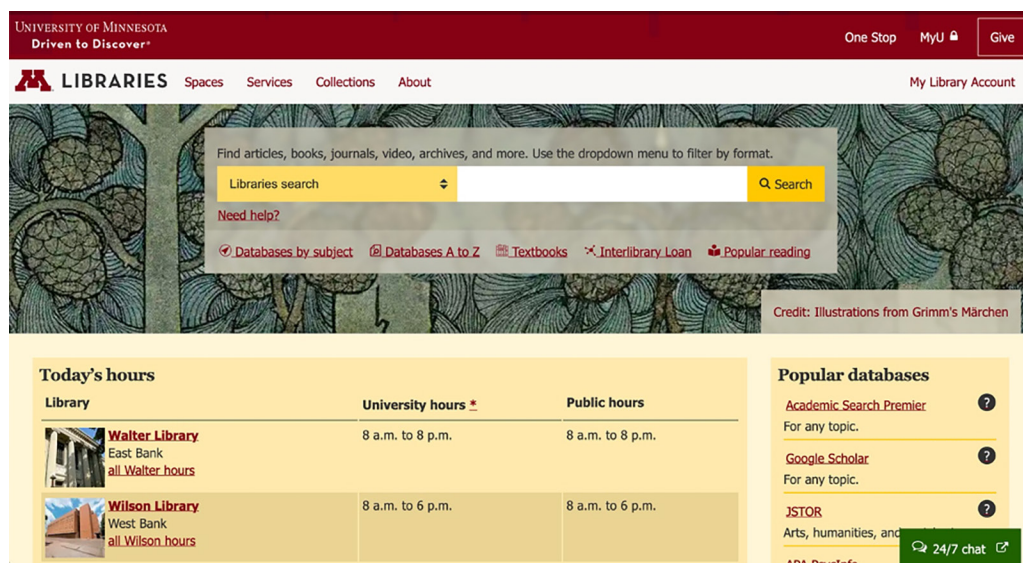
Creating welcoming technology spaces is part of the mission of the University of Minnesota Libraries, and a proactive chat project could not move forward without understanding the accessibility implications of such a change. Accessibility evaluation represents a gap in the proactive chat literature, and this study focuses on identifying potential barriers for VRS users in Springshare's widget and also evaluating the potential use and ideal configuration for a proactive widget at the University of Minnesota. Our research questions focus on the visibility and usability of the current static chat widget, University of Minnesota student impressions of a simulated proactive chat widget that was shown as part of the focus groups, student opinions on the positioning of this simulated proactive widget, and questions around the accessibility of Springshare's proactive chat widget.

Figure 3 shows the pop-up window with the out-of-the-box language provided by Springshare: "Do you need help? A librarian is online ready to help." Two button options are provided under this prompt, allowing users to select "Chat Now" or "No Thanks."

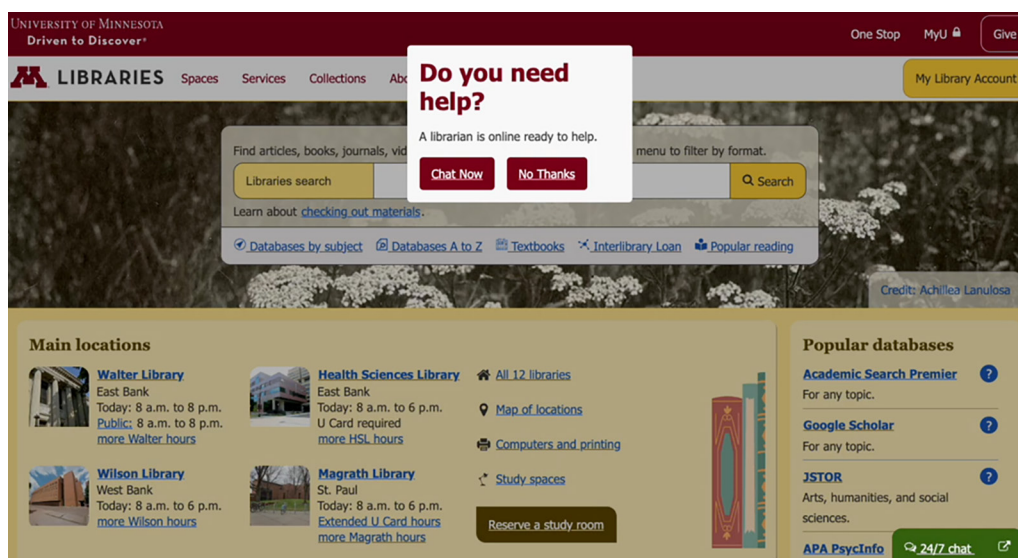
This article addressed the following research questions:

RQ1: Are intended user participants aware of the current chat options on the library website?

RQ2: Would intended user participants prefer to use static or proactive chat options?



**Figure 2.** Screenshot of the home page of the University of Minnesota Libraries.



**Figure 3.** Proactive pop-up chat prompt.

RQ3: Do intended user participants feel that the proactive chat widget would impede their use of the library website?

RQ4: Where would a proactive chat widget be most useful on the library website?

RQ5: Does Springshare's proactive chat widget meet accessibility standards outlined by the University of Minnesota?

The first three research questions used a focus group approach to collect data, whereas the final two questions used a combination of focus group data and accessibility assessment.

## Methodology

Drawing from the research, this study focuses on an integrated assessment of Springshare's proactive chat widget and user experiences. Toward this end, we conducted two sessions of impromptu focus groups and interviews with University of Minnesota students, consultations with representatives from the Disability Resource Center (DRC) at the University of Minnesota, and an analysis of Springshare's accessibility documentation and relevant literature in this area.

The target user groups for this study included University of Minnesota undergraduate and graduate students. We recruited an undergraduate coinvestigator who assisted with the study design, data collection, and data analysis. The goal of our focus groups was to collect data from both students who were already library users and those who had not yet used the libraries. The first set of focus groups was conducted in the study room of a collaborative space in one of our libraries. Participants in the focus groups were groups of students studying together in library spaces who were recruited via signage and direct invitation in the space. A total of seven students in three focus groups were recruited from the libraries in May 2025. The second set of focus groups was conducted on the main campus mall on a beautiful day toward the end of the spring semester 2025. Participants in focus groups were small groups of students walking together. A total of twenty-eight participants were recruited in fifteen focus groups. A consent information form was shown to students before their participation in the study, and a waiver of signed consent was approved through the University of Minnesota Institutional Review Board for this study. There were between one and four participants

in each focus group, and the investigators spoke to each individual participant for five to eleven minutes. Participants in focus groups were provided with snacks for their participation in the study.

For the accessibility review portion of the study, a test widget was created for proactive chat within Springshare and hosted on a development instance of the library website. This draft proactive widget was shown to participants in focus groups as part of the interview protocol, which is included in the Appendix. The draft proactive widget was also submitted to the University of Minnesota's DRC for an accessibility check, and investigators worked with employees in the DRC to test the tool for accessibility, including live testing with a screen reader. Investigators also conducted an analysis of Springshare's Voluntary Product Accessibility Template (VPAT) documentation for LibAnswers.

Focus groups with student participants were recorded in order to create a text transcript for analysis. Interview transcripts and other documentation were analyzed collaboratively by the investigators using the NVivo qualitative analysis software. Open inductive coding was used, as well as memoing and theme summary documents created by the authors. Intercooder reliability was conducted with two of the investigators on 20% of the interview code content and was calculated at a kappa of 0.57, indicating moderate agreement.<sup>27</sup>

## Results

The study recruited a total of thirty-five participants, although three participants were not included in the results analysis because they identified as nonstudents or University of Minnesota staff. The usable data included thirty-two total participants, of whom twenty-six (81%) were undergraduate students and six (19%) were graduate students at the University of Minnesota. This reflects the proportional enrollment of undergraduate and graduate students overall at the University of Minnesota. The data included eight (25%) students majoring in arts and humanities, including students in the University of Minnesota's College of Liberal Arts programs and the College of Design; eight (25%) students majoring in math and science topics; seven (22%) majoring in business and finance programs; four (13%) from engineering programs; three (9%) from education and human development programs; and two (6%) who had not yet declared a major. Throughout the results section, verbatim quotes from participants will be cited via their participant number; for example, participant 1 will be represented as P1.

The first research question asked whether intended user participants were aware of the current chat options on the library website. We found that the majority of participants (approximately 90%) were not aware of the current chat service available on the library website. This was true for focus groups conducted within the library as well as for participants recruited outside of the library. We asked participants how they would contact the library if they had a question about homework or research, and some suggested other routes for these questions if they were unfamiliar with library services. One student mentioned, "I prefer directly asking my course professor or the TA [teaching assistant] for course-related questions, not anyone in the library" (P28). P17 also said, "I think I would maybe contact my teacher because he teaches me how to do things like, kind of research things." P3 said, "I don't think I've ever thought about asking the library for help with homework." In fact, of our thirty-two participants, ten (31%) stated specifically that they did not use the University of Minnesota Libraries for homework or research. Some students were pleased and surprised to learn about library service offerings, including the 24/7 chat cooperative, stating, "That's like having an army. Oh my word!" (P6).

Participants from both groups suggested that they would reach out to the libraries in person rather than visiting the library website if they had questions. P1, who was part of the in-library focus group,

said, "I think I'd go to, like, the front desk, like out there." P2 from the same focus group echoed, "Yeah, I would say front desk too." Students who participated in the focus groups outside the library also expressed a preference for in-person service. P25 stated, "If I wanted to come check the libraries, I'd probably physically come in and then ask someone at the front desk or something." P26 said, "I would just go to the help desk and ask them my question." P28 agreed: "If . . . I have a question, I'll ask the front desk."

Only three (9%) of participants indicated that they had used the libraries' VRS chat. One of the students, P20, said they found out about the chat because "my teacher told me to go there." Most students were unaware of the VRS chat, but many were pleasantly surprised to hear it was an option. P6 exclaimed, "I had no idea that you could talk to someone. That's actually really nice." Several students also raised concerns that the chat service could be artificial intelligence (AI). P11 questioned, "I don't know if it is like an AI-generated chat to ask more questions, or . . . ?"

Investigating the second research question, we were interested in whether participants would prefer to use static or proactive chat options. To gauge perceptions of proactive chat among participants, we asked about whether they used customer service chat on other sites, such as retail sites and banking. Of participants, 44% ( $n = 14$ ) said they did use commercial chats, although some indicated they only used these occasionally, and some participants, such as P31, specified that they were not happy with the service provided through these chats. P28 clarified, "I don't use the chat feature to ask any technical questions. [If] I just have some doubts regarding the inventory, or something like that, then only I use the chat feature." Several participants who indicated that they did not use commercial chats had strong negative feelings about them, including P19, who stated, "I think that they're stupid and they're never helpful." P21 from the same focus group agreed: "Yeah, I usually don't [use them], because they're pretty difficult to work with and don't always help me."

When we demonstrated the proactive widget to participants and asked whether they would use it on our site and whether they would be more likely to use it over a static chat widget, overall, twenty-two participants (69%) stated that they maybe, probably, or definitely would use a library pop-up chat, and seven participants (22%) said they definitely would not use it. Some participants specifically referenced the proactive action as a reason not to engage with the chat widget. P32, for example, was blunt: "I think I'd probably say no out of spite." P18 echoed this, stating, "I think I would close because it just popped up." Some participants expressed a stronger interest in the static widget, like P2, who stated, "I think I would use the original one more, not the pop-up."

Some participants suggested that the proactive pop-up would get in their way when using the site. P14 said, "Sometimes that annoys me when that comes up and I don't want to use it. And, like, if I see it in the corner, and I thought, oh, maybe it'll be helpful, then I would use it. But I think if it comes like that, I'd be like, no." P29 stated, "I would say it will cause a hindrance for me, because I know, like, what all steps to follow to get to the thing I want. So it is just wasting some of my time. So my first reaction would be to just click 'No Thanks' as soon as possible, without even reading anything." Some participants indicated that they would not use the proactive widget, but they thought that it was a positive idea. P3 stated, "At least I would know the pop-up is there; I would probably maybe use it more."

From the participants who were in favor of the proactive chat widget, P26 said, "It will obviously have a higher likelihood that I will click on 'Chat Now' and use it for some of my queries." P11 and P12, who were part of the same focus group, also expressed a positive impression of the proactive widget. P11 stated, "Yeah, I feel like it would be more effective in helping me find my answers." P12 responded, "I think so, yeah, me too, especially when I'm lazy." P7 suggested, "I think it'd be good

for the people that don't know it exists . . . because it has a 'No Thanks' button, so it doesn't make you chat." Some participants expressed positivity about a proactive chat widget with the caveat that a real person was answering. P25 stated, "If I had a question, it's just easier to talk to a librarian." P30 said it was a good way to help users know that there is a chat and "that there's someone on the other side listening." Only one participant felt negatively about having a real person on the other side of the VRS widget. P2 theorized that if they responded positively to the proactive widget pop-up, "I feel like a real person would like to try to talk to me. I just feel too anxious. I just close [it]."

We asked participants questions about their use of the library website in order to determine whether they felt a proactive chat widget would impede their use of the website for the third research question. We asked participants how frequently they used the library website, and the results were very distributed. It was an even division between those who never used the site, those who used it sometimes (between one and four times per semester), and those who said they used the site often. Some participants specified that they only visited the library website to book physical space and study rooms. Of participants who used the site frequently, P10 said they used it, "Very frequently. Every time I need to do research." P14 said, "I feel like it's pretty easy to navigate in terms of finding things like hours, study hours, or maps of locations." P5, who was part of an in-library focus group, stated, "I use it pretty frequently, honestly, like right now I have a lot of stuff checked out, and I go in there all the time to check if I'm doing something like a research paper or something." P6, from the same focus group, agreed: "Same. Mainly I look for sources and see if I can get books . . . most of the time . . . I'm looking for pieces that I can't access online." P7 said, "I use it for most of my scholarly sources, just because it's easy to find scholarly sources." There was not much indication that participants felt a proactive chat widget would impede their use of the website, although some participants were uncertain how many times they would need to click "No Thanks" during a session if they did not want to chat.

Although most participants felt positive about using the proactive widget, several were lukewarm, such as P1, who stated, "I feel like if I was in desperate need of help, yeah, I would use it." Several participants expressed reservations because they thought that the library VRS was a bot or generative AI. P10 suggested, "I think if I thought it was AI, I would have reservations, because obviously, some of the chat modules, they aren't as helpful. People are always a high priority." P21 expressed a similar sentiment: "I would think it would be helpful . . . but I would have that same question, if it was like a bot or if it was a real human that was helping me out." One focus group also included this exchange:

Interviewer: What would you think if you encountered something like this on the library website?

P23: Is it made by AI?

Interviewer: No, it is a real live person.

P23: Oh, okay, that's pretty good, then.

P24: I think that's cool, yeah.

Participants who inquired about the nature of the chat were pleasantly surprised to learn that responses were provided by a human librarian, and many expressed more interest in using it once they knew it was not AI.

For the fourth research question, we asked participants about the design elements of the chat to determine where a proactive chat widget would be most useful on the library website. During the focus groups, we solicited feedback on the design of a test version of the proactive widget, which

was hosted on our development site. The test widget popped up in the center of the page after a ten-second delay. The feedback for the test widget was largely positive, and we got a sense of how these participants felt about a pop-up chat—as well as how strongly some of them felt. Every participant who had an answer felt differently about the positioning of the widget on the page. Some, like P10, liked that the widget popped up in the middle of the screen, stating, “I think making it obvious is the best way to do it.” P11 also thought the middle of the screen was the best spot. “I think it makes sense where it is right now, because it’s . . . easier to navigate.” P19 echoed this, adding, “You don’t have to look for it.”

Alternatively, some participants, like P12, expected to see it in a bottom corner: “I think on other websites, it’s usually in the bottom right corner, so that’s where I go to look for it. It’s more accessible right there.” P14 and P15 also mentioned a bottom corner, and P14 said of the widget popping up in the center of the screen, “This is like *too much*.” P7 suggested the lower corner, noting that the center placement might cause them to think “it’s like a virus pop-up.” P6 in the same focus group added, “Yeah, I see a lot of those, and I immediately shut them down.” P23 thought the middle location was “a little in your face” and then suggested the “top” somewhere. P32 also suggested a corner: “It annoys me less if it [is] near the bottom corner, or something near the bottom corner.” Participants also commented on the design of the original static widget, with one focus group agreeing that the current widget was too small. P26 explained, “I would say this is very small . . . the chat feature is not that visible.” P27 echoed this: “Same again. Right now, it’s so at the end of the screen that my attention does not naturally go down to it.” P28 added, “It’s really small, and my attention wouldn’t go in that corner.”

Participants expressed concern that the proactive widget could be annoying if it continued to pop up after respondents indicated they did not want to chat. P7 suggested, “I think it’d be good for the people that don’t know it exists . . . because it has a ‘No Thanks’ button, so it doesn’t make you chat.” P6 agreed, “Because then once you know it exists—which is awesome because I wouldn’t have known otherwise—if there’s a way to be like don’t ask me again. . . . So, nice, otherwise that would start to drive me insane.” P17 and P18 also expressed concern about repeat pop-ups. P18 suggested, “Because every time that I get on the website and I have to click this every time, it’s kind of annoying a little bit.” P12 suggested that the proactive element could be a good marketing tool but appreciated that the static widget would always be there as well: “I think usually when I’m using the website, I, like, search the stuff first, and then I’ll go to the chat if I can’t find it. So, I feel like if that popped up when I was first on the website, I’d probably say, ‘No Thanks.’ But it’s helpful to have the little tab in the bottom when I, like, can’t find something, and then I go to it.”

The fifth research question focused on whether Springshare’s proactive chat widget meets the accessibility standards outlined by the University of Minnesota. To investigate this research question, we both reviewed the accessibility information provided by Springshare and enlisted the assistance of a representative from the University of Minnesota’s DRC to review the proactive test widget we created and assess it for accessibility. Springshare provides VPAT structured accessibility documentation via the Springshare Lounge, which is accessible via individual accounts for users at Springshare customer institutions. The VPAT for LibAnswers states, “We have tested all elements of the LibAnswers interface using VoiceOver, and regularly test LibAnswers using SiteImprove and WAVE. Page content is structured in a meaningful hierarchy and can be navigated and understood using a keyboard and/or screen reader, and we strive to make sure all development is executed in a way that’s meaningful and clearly understandable to users without vision” (36).<sup>28</sup> Springshare notes that the company uses “the World Wide Web Consortium’s Web Content Accessibility Guidelines (WCAG) 2.1 as our guide in the design and development of our products,

with a goal of meeting Level AA standards.”<sup>29</sup> WCAG represents a series of standards that can apply broadly across different technologies to help promote known accessibility improvements.<sup>30</sup> The VPAT for LibAnswers conforms to these standards, articulating how the product meets each standard. WCAG 2.1 is also the standard required for implementation of Title II of the Americans with Disabilities Act (ADA).<sup>31</sup>

In the accessibility review provided by our institution’s DRC, we were assigned a representative from that office to live test the proactive chat widget on Zoom, sharing their screen and audio. Using screen reader software, our partner live tested the proactive chat widget with us. They had experience working with Springshare products before and expected the product to meet the accessibility requirements. When the proactive chat was initiated, the screen reader was able to read the pop-up text and the content behind it. The partner confirmed that focus was not obscured when using the pop-up chat. The Escape key worked to silence the pop-up, which is important for keyboard-based navigation. After silencing the chat, the user is returned to their workflow. They were able to successfully navigate the proactive widget using their test screen reader and successfully silence the widget and return to regular page flow.

Our partner from the DRC suggested two changes to the design of the widget to improve accessibility. First, to update the header style in the title of the pop-up widget, which was using the H2 subheader style and adding an “x” to the top right corner to opt out of the pop-up, in addition to the “No Thanks” button. We discussed the concern that participants expressed that the pop-up chat would continue to disrupt workflows even after users opted out using the “No Thanks” button, and our partner confirmed that this could be disruptive to workflow if the choice was not persistent.

We also discussed the potential for the pop-up to be disruptive to neurodiverse users, and our DRC partner confirmed the challenges of designing and testing for this. They offered a few suggestions, including planning and testing around timing for the widget and structured testing of the persistence of the “No Thanks” button for silencing the chat. This echoed what we heard from participants in the focus groups: It is ideal for the chat to remember for the session that after it’s dismissed, it shouldn’t pop up again. We also talked about the timing of the chat—whether it should only pop up after thirty or even sixty seconds. Our partner also suggested that we follow the statistics on this if we establish the proactive tool.

## Limitations

The design of the study was successful in recruiting both library users and students who had not yet used library services, but the participant group was not structured to be representative of these groups. Students were recruited from only the University of Minnesota, so while this single-institution study is not generalizable, we do feel that the findings are transferable and the method is replicable, particularly in institutions that are also using Springshare’s LibAnswers for VRS and considering implementing proactive chat. This study also only captures one particular moment in student information practices. Many of our participants were thinking about the impact of generative AI on their information lives even as we talked to them about the implementation of this specific tool. Future studies could take a broader view on this and further investigate the impact that generative AI has on VRS.

We also recognize that the literature scope and data collection around accessibility are limited. We had hoped to find more qualitative investigations of accessibility relating to neurodiversity. Qualitative studies building on this work could investigate this more fully with user populations that identify as neurodivergent to help build a better understanding of how proactive chat widgets

are received by a broader range of users. Although this study was conducted through our own perspectives, we took steps to minimize bias, including developing a research team with diverse experience and recruiting an undergraduate coauthor who provided a different perspective on our data and analysis.

## Discussion

While we specifically sought to recruit participants who were not necessarily library users, we were surprised by the proportion of students who were not aware of our VRS offerings. Many of our participants were delighted to hear that the library offered such a service and that it was staffed by human librarians; thus, the study turned into a guerrilla marketing campaign. The University of Minnesota does promote VRS as part of library outreach and instructional programs, particularly integration into the first-year writing program at our institution, but nearly all participants who had heard about VRS chat learned about it from their course instructors. This has implications for how we promote VRS, and ensuring that instructors know about it and can refer students to it at the point of need might be a better bet than focusing on promoting directly to students at the point in their learning where using the service is an abstraction. This also suggests that proactive chat might be a more effective way to promote the service because of its integration with research at the point of need within the library website.

In investigating participant preferences around proactive chat design, we heard that the quality of service was important to them in their use of commercial chat services. Even participants who said they did not use customer service chat on retail sites had used them enough to form an opinion. Participants indicated quality-of-service reasons for not using commercial chat, including that it wasn't helpful or it was "stupid" (P19). Our current VRS service earns consistently high comments and rankings from users in the native survey that Springshare offers as part of the LibAnswers service. Part of the core of our service model in LibAnswers is staying attuned to quality, including sharing positive comments each month as kudos to our staff directly and sharing the monthly service rating, which makes use of Springshare's built-in four-point rating survey, with chat participants and other library staff. Our current VRS users love the service, and balancing quality control with volume increases could be a challenge in implementing proactive chat.

We were also surprised by the number of participants who told us they would visit the library in person if they had a question. While gate counts have recovered since the COVID-19 pandemic, gate count volumes in 2023–2025 did not exceed prepandemic numbers, and VRS is a proportionally stronger service postpandemic. Some participants who did not even routinely use the website to access services or research had used it as a portal to access physical study spaces in the buildings. Both the low visibility of VRS in the institution and a preference for face-to-face interaction echo the results of Connaway and Radford's 2011 *Seeking Synchronicity* research,<sup>32</sup> suggesting that barriers to accessing VRS may not have changed significantly. In terms of our accessibility review of the proactive chat product offered by Springshare, we were satisfied that it met the standards outlined by the University of Minnesota through our review of documentation and our testing of the widget with our DRC representative.

We should not have been surprised that AI came up as frequently as it did. Although we did not ask participants specifically about it, many drew connections between the VRS service and their use of AI. We have also noticed an increase in VRS patrons in LibAnswers treating our chat service as if it is an AI chat form, including submitting keywords rather than questions, and decreases in the relational aspects of VRS, including greetings and closing rituals.<sup>33</sup> Some participants indicated that

they would use AI over a VRS service in the library, like P27, who stated, "I use ChatGPT for almost everything, so it's more user-friendly for me." Most participants, however, were impressed that the library offered live human chat and suggested that we promote that aspect of the VRS more heavily. P20 even suggested that we update the language of the widget: "I think you need to put the words 'a real-life librarian.'" Librarians have legitimate concerns about the rapid rise in generative AI use. In their article on AI adoption in libraries, Harisanty et al.<sup>34</sup> argue that while library professionals should explore AI tools, they are not optimized for our work, especially because these tools are still in an emergent phase. In 2024, Li and Coates put ChatGPT to the test and asked it ten common questions asked by their student and faculty patrons, and their results found that the answers were not always correct or truthful.<sup>35</sup> While generative AI tools continue to evolve, there are still significant barriers to understanding how to teach and advise about these tools for librarians.

Overall, our participants were very willing to try proactive chat and thought that VRS seemed like a potentially helpful service. Our takeaway from conversations with participants is that proactive chat could be a helpful bridge to place VRS at the user's point of need when they are doing research and coursework. Most of our participants who had used VRS were referred by an instructor in the context of an assignment, and we did not hear from any participants who learned about VRS through other types of library communications. We learned that our participants highly value quality in online chat interactions and that maintaining quality control should be a primary goal of proactive chat service, even as volume increases. We also learned that for many participants, physical library spaces are psychologically important, and maintaining a physical presence along with a robust VRS service was an important goal. Promoting VRS as a tool that library staff in the buildings can use for referrals may be a way to bridge access for users. While we felt satisfied that Springshare's proactive tool met all accessibility standards expected by our institution, there is still more work to be done to understand the potential impact of a pop-up library chat on how students work on the library website, including understanding how neurodiverse students interact with the tool. Many students drew parallels between VRS and generative AI tools, but nearly all of our participants wanted to talk to a human. Most librarians also want to connect with students, so proactive chat may be a powerful tool to help make these connections.

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### **Appendix:** Focus Group Protocol

Begin with introductions: name, year of study, major or college.

Interviewer will show the library website and indicate the chat button at the bottom of the screen.

- How frequently do they visit the library website?
- If they had a question about library policies today and wanted to contact the libraries, how would they do it?
- If they had a homework or research question today and wanted to contact the libraries, how would they do it?
- Have participants ever used the chat feature on the library site?
- If they have used it, what was their experience like?
- If they have not used it, why not?
- Do they use chat features on commercial/retail sites?
- Have they ever encountered a pop-up chat on a commercial/retail site? If so, what did they think about it?

Show created visual of pop-up library chat.

- What would they think if they encountered a pop-up chat on the library page?
- Would they use a pop-up chat feature if they had a question about library policies? Why or why not?
- Would they use a pop-up chat feature if they had a homework or research question? Why or why not?
- Would they be more likely to use this pop-up than the existing chat feature?
- Where would they expect to see the pop-up feature? Is the location shown correct, or does it make more sense in another location?