Practical tips for facilitating research

PRACTICAL TIPS FOR LIBRARY AND INFORMATION PROFESSIONALS

This series provides a set of practical guides for the busy professional in need of inspiration. Sourced from experienced library and information practitioners, grounded in theory, yet not overwhelmed by it, the information in these guides will tell you what you need to know to make a quick impact in a range of topical areas of professional interest.

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After qualifying and working as a librarian in her early career, Helen worked for Jisc Netskills for 13 years providing training and working on a diverse range of projects across various sectors and then as librarian in the liaison team at Newcastle University. She has a keen interest in all aspects of information and digital literacy, and in supporting staff and students in their development.

Practical tips for facilitating research

Moira J. Bent

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Helen Blanchett, Jisc, UK

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Each book takes a tips-based approach to introduce best practice ideas and encourage adaptation and innovation.

The series is aimed at experienced library and information professionals looking for new ideas and inspiration, as well as new professionals wanting to tap into the experience of others, and students and educators interested in how theory is put into practice.

Practical Tips for Facilitating Research

The changing nature of the research environment, involving increased competition and demand for wider dissemination and impact, provides challenges for librarians, but also opportunities. Roles are evolving, with activities being driven more by researcher requirements, which in turn requires more engagement with researchers.[1] New specialisms are also emerging,[2] such as that of data librarians. This book aims to provide practical tips for librarians wishing to survive the 'crisis in research librarianship',[3] demonstrate value and shape new roles in the research process.

Moira J. Bent has a wealth of experience working with researchers in her library role, and indeed as a researcher herself. When looking for an author to write this book she was an obvious choice.

Moira has previously written about providing effective library services for researchers[4] and explored information literacy throughout a researcher's life.[5] As a leading expert in information literacy, Moira co-authored the SCONUL Seven Pillars of Information Literacy.[6] She was an advisor on the information literacy lens on the Vitae's Researcher Development Framework[7] and co-authored the Informed Researcher booklet.[8]

While supporting researchers has long been part of an academic librarian's job, Moira feels strongly that librarians have a role beyond 'support' – that we can play a vital role as a partner in the research process. While this book is intended to provide practical advice, ideas and tips, it may also change how you think about your role.

As well as incorporating her own tried and tested examples, Moira has gathered together ideas from practitioners around the world and added her own reflections.

I'm grateful to her for writing this book to capture and share her years of experience.

References

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2. Cox, A. M. and Corrall, S. (2013) Evolving Academic Library Specialties, *Journal of the American Society for Information Science and Technology*, **64** (8), 1526–42.
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7. Vitae (2012) Information Literacy Lens on the Vitae's Researcher Development Framework. Available at: https://www.vitae.ac.uk/vitae-publications/rdf-related/information-literacy-lens-on-the-vitae-researcher-development-framework-rdf-apr-2012.pdf.
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Acknowledgements

SECTION 5

Places and spaces

5.1 Host research events in the library

ONE WAY OF attracting researchers into the library is to host regular events for them to attend. The library is a neutral space in the organization and can be an ideal venue for events organized by and for researchers. Such events don't need to have a specific link to the library and its resources, it's sufficient that they bring researchers into the space and raise the profile of the library as a scholarly venue. These events may be organized and run by library staff, as with information literacy workshops, but they can equally be owned by the research community and just facilitated by library staff. Facilitation can simply take the form of providing a space, but can also extend to providing refreshments (always a draw) or to helping with the administrative tasks, such as promoting the event, maintaining a list of attendees, etc. Events may be part of a regular programme to which researchers have to apply for space, for example a Library World Café, or you may simply identify a suitable space and advertise it as available for research-focused meetings. If there are any LIS staff who are also active researchers this is an excellent opportunity for them to participate on a level playing field with other researchers in the organization, potentially altering perceptions amongst researchers about who they are and what they do. Such events are also useful for both raising awareness of the library and for learning more about current research activity.

One of the benefits of this kind of activity is that researchers will start to see the library in a different light, not just as a provider of information, but as a key part of their research life. It is surprising what a difference such a subtle change in emphasis can make in terms of changing perceptions of the library from a purely supporting role to being a more integral part of the research lifecycle.

If the library includes a research commons or specific research zone, then this kind of activity may be common practice, but even without such a specific facility it's possible for the library to become the accepted place for research-focused events.

👍 Best for:

■ becoming part of your research community and a more integral part of the research process

■ changing perceptions of library staff.

★ Examples from practice

Liverpool John Moores University Library, UK
The library service at Liverpool John Moores University (LJMU) hosts regular Research Café events, circulating between their three libraries. Up to four participants volunteer to talk about their research in a relaxed and informal setting, followed by questions and discussion. Booking isn't required and all staff, students and alumni are welcome to attend. Researchers are encouraged to speak via their graduate schools and the event is publicized across the university. Cakes are provided!

> *'At Christmas we take the Research Café out into the wider community and invite more experienced researchers to present their work. Our most recent Christmas Special took place in the public library, where our speakers covered the seasonally appropriate subjects of excess, shyness and exercise.' (Jan Burrell, LMU University)*

Following the event a photograph and summary presentations are hosted on the library website.

⚠ To think about

It's important to identify your role in this kind of meeting clearly . To generate a sense of ownership, it's best for them to be initiated and run by the research community, but inevitably reminders have to be sent by the LIS team to the organizers and the administration and organization is also done via the library.

> *'As the research community is a fluid population, it is hoped that this will enable the Research Workflows Community of Practice to grow and develop even if the original participants have moved on.' (UK librarian)*

Providing a small amount of refreshment helps encourage attendance, though it isn't essential.

> *'We offer food at our workshops but we find that often folks don't eat much. It's more about changing the atmosphere of the event.' (Helen Young, Loughborough)*

Think about who the audience for the event is. Can you extend it to final year/masters students for example, or past employees or alumni? Is there scope for involving the local community?

References and further reading

Liverpool John Moores Research Cafés: an example of how the cafés were promoted: https://lineupnow.com/event/research-cafe-. (Accessed 20.1.16)
Liverpool John Moores Research cafés: YouTube recordings: https://www.youtube.com/playlist?list=PLD-jFJJqLKxKvqu278STa81qZPcaXGmG6. (Accessed 20.1.16)

Acknowledgements

Jan Burrell, LJMU Library Services and Graduate School.

5.2 Engage distant researchers in real time

NOT ALL PHD STUDENTS are based close to their home university. Many conduct their original research in the field; others choose a specific distance learning degree which allows them to study from home. Even those based locally may have personal commitments, such as job and families, which make it difficult to participate fully in university life. With such a disparate research community it can be difficult to foster a sense of community, to engage with researchers who may be in different parts of the globe and to offer an equitable experience to them.

Online solutions to this issue are becoming more common. Information literacy lectures and workshops can be recorded and made available, videoconferencing and webinar software can be employed to run real-time sessions and even regular online chat can help. If your organization makes use of a virtual learning environment such as Blackboard or Moodle, consider whether you can interact with the research community in this environment, perhaps using the chat or whiteboard facilities at a regular time each week.

In an attempt to provide parity of experience for distant researchers some university libraries have extended their face-to-face consultation booking service for postgraduates to encompass different media, for example using Skype, Lync or similar software, to book virtual face-to-face meetings. Even booking a phone conversation so that the researcher is discussing his or her queries in real time with a named individual can help to make a distant researcher feel more valued and adds a personal touch that merely engaging with online resources can't replicate. The personal touch, knowing with whom you are talking, can be vital for an isolated researcher. Whilst general

queries might be fielded by an enquiries team, getting to know an individual or small team within the library is very comforting and helps to build better relationships.

👍 **Best for:**
- engaging with PhD students, both locally and at a distance
- providing equity of service to all the research community
- building relationships and fostering community.

★ **Examples from practice**

Concurrent seminars and webinars

The University of Leicester runs a regular Thesis Forum, in which existing or recently graduated PhD students talk about common aspects of their PhD experience. It is run as a simultaneous seminar and webinar using Adobe Connect with a microphone and webcam, and a projector in the seminar room so that all can see. The session is also recorded and made available later, but only within the community, so that speakers feel more able to speak freely. The sessions work well, with participants from all over the world giving very positive feedback on how the experience makes them feel part of the research community.

Skype research interviews

A university library in Australia liaises with a research community spread over a very wide geographical area and even encompassing different time zones, making it difficult for many of them to visit the library. In order to mitigate the effect of distance, the library invites researchers (mainly, but not exclusively, postgraduate students) to book an initial research interview with their research librarian at the start of their research. Whenever possible the interviews are carried out via Skype so that both participants can see each other and discussion centres around the topic of the research and the ways in which the librarian and the library can offer help. Each interview is followed with an informative e-mail, summarizing the key content of the discussion, and a further e-mail is sent two months later to maintain contact with the researcher. Where Skype is not possible, interviews are carried out over the phone.

> 'It is quite time-consuming to talk to each researcher individually and we've been talking recently about trying to get small groups together on Skype, but I think we'd lose a lot of the personal contact that is set up with this approach and folks do really seem to appreciate the effort we go to.' (Australian librarian)

⚠ To think about

Having control of the space and the equipment can help ensure success of an online session; if you are reliant on technical support from elsewhere this could jeopardize the smooth running of the event. For this reason, it is recommended that you train staff well in the use of the equipment and test it well before every session.

Confidence is also important. Think about how you will cope if the technology does let you down. Have a back-up plan so that participants still gain value from the interaction.

References and further reading

Leicester Thesis forum,
    www2.le.ac.uk/departments/gradschool/current/thesis-forum.
Gannon-Leary, P., Fontainha, E. and Bent, M. (2011) The Loneliness of the
    Long Distance Researcher, *Library Hi Tech*, **29** (3), 455–69.

Acknowledgements

5.3 Develop research zones

WITH THE RECENT focus on undergraduate students and learning spaces, many university libraries have developed as very successful, exciting, dynamic learning places. Do these spaces work equally well for researchers, or might there need to be more differentiation? Does the status of researchers entitle them to special spaces, or is anyone who is working hard at their own level also entitled to think of themselves as a researcher? Opinions vary on this and libraries around the world have dealt with it in different ways. Some libraries provide separate, closed access spaces for researchers, with additional services and privileges, such as coffee machines, lockers and access to the library's research team. Specialist software, for use only by researchers, can also be made available if the access to the space is restricted. Other libraries may identify research space with walls, screens, furniture or signs but do not physically restrict access, relying on the space itself to create the research ambience. Alternatively, some libraries treat all study space as research space and expect users to respond accordingly. Each approach has merits and drawbacks and may depend on the individual organization and the recognition given to research within it. Much has been written about the design of spaces for researchers. For example Freeman (2005), Beard and Bawden (2012) and Corrall (2014) all provide useful context for a deeper investigation of this topic.

The research commons concept is a more sophisticated development of a research zone, combining traditional quiet study with collaborative social space in a technology-rich, multifunctional space, usually in partnership with other sections of the university, to provide complementary expertise. This one-stop-shop space for researchers is often in a prime location, highly visible and clearly differentiated, indicating that researchers 'need to be separate from undergraduates as they are engaging in knowledge creation at a different level' and that they will be 'inspired by a creative and contemplative atmosphere' (Corrall and Lester, 2013). For library staff looking to develop closer working relationships with researchers, the research commons provides an ideal location. The detailed task force report from Ohio State University Library is a helpful working document (Black et al., 2013).

👍 Best for:

- defining specific library spaces for researchers to demonstrate the library's commitment to the research community
- creating a creative and contemplative atmosphere.

★ Examples from practice

Research zone at Northumbria University
The University of Northumbria Library in the UK has a dedicated Research Zone in the library, accessible to postgraduate research students and university staff. It operates with swipe cards and includes a breakout zone for coffee and a bookable research room. Individual workstations, interactive whiteboards and other collaborative tools are provided. The Library's Research Support team is located adjacent to the space and ran a Christmas tea party for regular users in the breakout room in 2014.

> 'Having a dedicated space for researchers gives them an identity and a separate space away from other students who they may also teach. We have a breakout room where they can relax, have a coffee and make phone calls – a place for them to rest away from their study area.' (Suzie Kitchen, Northumbria University)

The Edge, Duke University Library
Duke University Library in the USA has a space called The Edge, 'a collaborative space for interdisciplinary, data-driven, digitally reliant or team-based research'. It's a physical space in the Library which provides resources and expertise, including such things as data and visualization software, a digital studio, workshops, project rooms and presentation spaces.

University of Cape Town
The access controlled Research Commons opened in the main library at the University of Cape Town, South Africa, in 2008, mirroring the undergraduate Knowledge Commons and enabling staff to offer 'specialized support in both specific subject domains and research skills' (Daniels, Darch and de Jager, 2010). A detailed investigation of the effectiveness of the facility concluded that it has been successful in facilitating the creation of new knowledge and that it is popular with the research community, contributing to the development of the community of practice. However, scalability is of concern, both in practical economic terms but also whether the community feel would still be effective on a larger scale.

Wolfson Research Exchange, University of Warwick
The University of Warwick Library in the UK opened its Research Exchange in 2008, offering an opportunity for the research community to come together to share and create ideas. Partly in response to feelings of isolation amongst postgraduate researchers, who expressed a desire for a dedicated space distinct from the undergraduate student body, the Exchange provides a variety of different spaces: informal seating for discussions and small group activities, traditional study space and access to technology (Carroll, 2011).

⚠ To think about

By restricting access to parts of the library to specific groups of users you may leave yourself open to criticism. Policies for access need to be clearly defined and advertised.

The development of a research commons offers additional benefits in terms of closer working relationships with other sections of the university that also work with researchers, potentially leading to a much richer provision for the research community.

Does such a space need to be housed within existing library space, or might it be better located elsewhere, closer to the research community?

References and further reading

Beard, C. and Bawden, D. (2012) University Libraries and the Postgraduate Student: physical and virtual spaces, *New Library World*, **113** (9/10), 439–47.

Black, B., Connell, T., Dotson, D., Efkeman, T., Leach, B., Mandernach, M. and Reese, T. (2013) *Research Commons Task Force Findings and Recommendations*, http://library.osu.edu/staff/administration-reports/RCTFReport.pdf. (Accessed 27.5.15)

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Warwick: The Wolfson Research Exchange, *New Review of Academic Librarianship*, **17** (1), 78–95.

Corrall, S. (2014) Designing Libraries for Research Collaboration in the Network World: an exploratory study, *Liber Quarterly*, **24** (1), 17–48.

Corrall, S. and Lester, R. (2013) The Researcher's View: context is critical. In Watson, L. (ed.), *Better Library and Learning Spaces: projects, trends and ideas*, London, Facet Publishing, 183–92.

Daniels, W., Darch, C. and de Jager, K. (2010) The Research Commons: a new creature in the library?, *Performance Measurement and Metrics*, **11** (2), 116–30.

Freeman, G. T. (2005) The Library as Place: changes in learning patterns, collections, technology and use. In *Library as Place: rethinking roles, rethinking space*, Council on Library and Information Resources, www.clir.org/pubs/reports/pub129/freeman.html.

Other examples of Research Commons initiatives (of many) include:

- University of Washington Research Commons, USA http://commons.lib.washington.edu.
- Kelvin Smith Library, Case Western Reserve University, USA, http://library.case.edu/ksl/aboutus/researchcommons.
- New York University Bobst Library Research Commons, USA, http://guides.nyu.edu/content.php?pid=169930&sid=1431162.
- Sussex Research Hive, UK, www.sussex.ac.uk/library/research/hive.
- The Edge, Duke University, USA, http://library.duke.edu/edge.

5.4 Host research exhibitions in the library

WHY DO EXHIBITIONS in the library always have to focus on library collections? If you have the luxury of space, identifying a specific area within the library that can be used for highlighting current research can be a useful way of engaging with the research community. If the space is large enough to contain physical artefacts, perhaps sculptures or engineering structures, as well as research output such as copies of papers, books and reports, this can make the exhibition space very visually appealing. Research groups can be encouraged to bid for the space; an element of competition can make use of the space more attractive. Alternatively, a regular programme of exhibitions, with allocated slots for the research community, will enable researchers to plan

ahead and work towards the event. Tying the library's resources into the exhibition by highlighting 'find out more' or 'further reading' opportunities will not only engage library staff in learning more about the current research taking place within the organization but can raise awareness amongst the research group of additional resources for their research.

Smaller-scale activities, such as regular poster exhibitions, can be a less demanding, cheaper approach. Many researchers produce posters for conferences and might welcome the opportunity to display them locally afterwards. If your university has annual poster displays for postgraduate research students, or even poster competitions for undergraduates, consider whether the work can also be displayed in the library.

👍 Best for:

■ encouraging researchers into the library
■ making the library part of the research community
■ promoting the benefits of the library in widening access to research outputs
■ building relationships between the library and the research community.

★ Examples from practice

University of Western Australia

The science library at the University of Western Australia has an exhibition space that has housed racing cars developed by an engineering research group (Figure 5.1). They have also used images provided by their scientists to decorate the walls of their group study rooms.

Figure 5.1
*Exhibition space,
University of Western
Australia science library*

Nailing the thesis

'Nailing the thesis' is a tradition in several universities in Sweden and in many the ceremony is held in the library. At Umea University in Sweden the tradition is for doctoral students who have completed their thesis to nail a copy of the thesis to a noticeboard in the library as a public declaration that they have completed their research. See Tip 8.23 for more details.

Durham University Library

Durham University Library in the UK worked with students on an archaeology masters course to house an exhibition of artefacts found in the local river. The students researched the objects and curated the exhibition, which was located in a prime exhibition space in the library. The exhibition was launched at a Friends of the Library evening, attended by local residents and academic staff, and the students talked about both discovering the items and the process of curating them. This activity has led to a very rich relationship between the library and the department.

⚠ To think about

Mounting exhibitions can be time-consuming and requires expertise that individual research groups may not have. If LIS staff can provide this, working closely with researchers to develop the display, this can enrich the relationships. However, it will demand a consistent, ongoing level of investment of both time and money from the library and so is not to be entered into lightly. A poorly curated exhibition will reflect badly on all concerned. Having fewer, high-quality exhibitions each year may be more effective.

References and further reading

For further information about the UWA Science Library exhibition see www.news.uwa.edu.au/uwa-motorsport-aug2014.

For more information about nailing the thesis see https://internwebben. ki.se/en/nailing-and-distribution, and https://m.youtube.com/watch?v= ONuJ2_8z6PI ('Usually, we don't sing . . .').

Acknowledgements

5.5 Get involved with local research conferences and events

MANY UNIVERSITIES AND large organizations hold both internal and externally facing conferences, bringing together experts from around the institution as well as from further afield. If you work in a large university, it is likely that researchers at your institution will be involved in organizing and hosting discipline-specific conferences within the university. Although at first glance they may appear to be very discipline-specific, it is worth considering whether the library might have something to offer. The conference can be an opportunity for you to learn more about what researchers are doing, to listen to their concerns and to become more aware of what their priorities are. It's a great way to meet researchers in their own environment.

If the conference has sponsor stalls, you can offer to provide a library stall, especially useful for internal conferences, where you can promote specific events, workshops and resources.

Perhaps you can provide library goodies for the delegate bags, or if the conference has a specific theme, can you create a book display or leaflet highlighting relevant resources?

Are there ways in which the library can contribute to the specific topic of the event, perhaps by providing a small, relevant exhibition at the conference itself, or in some way contiguous to it? Having recently been involved in organizing the LILAC conference at my own university, I know at first hand how much conference organizers welcome any additional help to make their event stand out. It may be that there is a local conference team who provide regular support for conferences; they will be able to advise you about impending activities so that you can follow up any which seem appropriate.

External delegates at conferences may wish to visit the library during their stay, and so if you are able to offer a special package for visiting delegates (even if it's just 'show your delegate badge to gain access to the library') that can also raise the profile of the library and will be welcome to the conference organizers, who will be keen to showcase their local facilities. If you know when the event is happening you can ensure that any library reception staff are aware of potential visitors.

Alternatively, you might contribute a few PowerPoint slides highlighting relevant library collections or interesting facts about the library; these could be displayed at the start of the conference to entertain delegates as they settle in.

👍 Best for:

- raising the profile of the library within the research community
- meeting researchers in their own environment
- developing a better understanding of what research is happening and what researchers' priorities are.

★   Examples from practice

University of Central Lancashire, UK

The University of Central Lancashire (UCLan) holds a two-day conference for their early career researchers at which they can present posters or a short presentation. Library staff attend the conference and network with the researchers, chatting about their work and offering advice on resources and personal consultations.

> 'Meeting in person is far better than an e-mail, also showing an interest in their individual research engages them.' (Annette Ramsden, UCLan)

University of Northumbria Library, UK

Northumbria University Library staff attended their university's Research Conference, providing a stall focusing on ORCID sign-up as well as offering breakout workshops on specific topics.

> 'This worked well for us and we'll do it again. Going to where the researchers are and meeting them in their space made us more visible.' (Suzie Kitchen, Northumbria University)

Loughborough University Library, UK

Loughborough University Library staff attend the university's Research Conference every year, providing a stall with a range of free gifts. As well as providing information about the library, it is used as an opportunity to find out more about researchers' views.

> 'The past two years we have held a sort of raffle, where one year, to tie into the conference theme, we asked people who came to stand to give us their views on open access (e.g. do you prefer green or gold) and then we drew out a couple of forms at the end of the conference and they won either the green Easter egg or the gold Easter egg (it was held in March). This year we asked them to tell us about their research and whether they would like to meet with their academic librarian for a one-to-one chat about their research needs – again we popped all the forms into a basket and some people won chocolates and a posh notebook.' (Helen Young, Loughborough University)

Newcastle University Library, UK

Newcastle University Library developed a modest exhibition and accompanying LibGuide on Alan Turing to run alongside a short conference on Turing held in the School of Computing Science to celebrate the Turing Centenary in 2012 (see Figure 5.2). Visitors to the event were encouraged by researchers to visit the exhibition in the library as part of their experience and some even contributed to the online guide afterwards. Although the exhibition itself was small, it was

valued by the research group and has resulted in a much closer working relationship with them since then. The following e-mail from a senior member of academic staff to a national society demonstrates the value placed on this kind of work:

Figure 5.2 *Turing exhibition at Newcastle University*

> *'Dear Professor [x]*
>
> *In connection with our seminar 'Alan Turing: Computing Pioneer' tomorrow the University Library here has prepared a small exhibition of materials and an online resources guide. Details are at http://libguides.ncl.ac.uk/turing.*
>
> *My colleague Brian Randell wondered if it would be appropriate to include the link on the Alan Turing Year web pages.*
>
> *Dr J. L. Lloyd BSc PhD CITP FBCS, School of Computing Science'*

In a similar way, the library contributed to an event to celebrate the life of Sir Joseph Swan, inventor of the lightbulb. Again, an online guide was created and his descendants visited the library to view various artefacts held within the library's Special Collections: http://libguides.ncl.ac.uk/c.php?g=130245&p=850694.

⚠ To think about

Finding out about conferences and when they are happening can be difficult and time-consuming. Is there a conference organizing team within your organization who you can make contact with?

Can you create a leaflet explaining what the library can offer to conferences that can be sent to local organizers?

If the service proves popular, will you be able to maintain it?

Even if you aren't a subject expert, there should be some aspect of research that you can pick up on and ask about. Demonstrating that you have listened to/read the work of any researchers you are engaging with will mean you are more likely to be remembered.

What capacity do you have to engage with research conferences in this way? Could the library invest in a small, relatively secure travelling exhibition case? What kind of materials might you display – current books, rare materials (or facsimiles) from your archives, copies of research papers?

Does the exhibition need to be specifically tailored for the conference or would a fairly generic display of 'treasures' suffice?

References and further reading

The Joseph Swan guide is available at
   http://libguides.ncl.ac.uk/c.php?g=130245&p=850501.
The Turing Centenary Guide is available at http://libguides.ncl.ac.uk/turing.

Acknowledgements

Suzie Kitchen, Northumbria University Library.

5.6 Be a secret shopper

MOST LIBRARIANS ENJOY visiting other libraries, looking for examples of good practice and for ideas which they can emulate. However, if you visit another library as a researcher yourself, putting yourself in their shoes, you may have a very different experience and this can help you to reflect on your own practice. Preparation for such a visit is very important. There may be aspects of your own library's provision for researchers that you wish to develop, and so plan ahead for the kinds of questions you might ask and the types of provision you want to look for. Once you have a framework in place, you can utilize it at relatively short notice if the opportunity arises.

Alternatively, rather than being a secret shopper yourself in other libraries, you can recruit researchers from within your organization to act as secret shoppers in your own library. This can be done in a very light-touch way, perhaps by giving new or inexperienced researchers a task to complete and asking about their customer journey. Engaging researchers in your own research in this way can also be helpful in changing their perceptions of your role – you are also a researcher as well as helping them to learn about the library themselves in a different way.

👍 Best for:

- ■ gaining a better understanding of the researchers experiences
- ■ identifying development opportunities and new ideas.

★ Examples from practice

The librarian who suggested this Tip says:

'It's all about empathy. It is beneficial to visit other libraries as a researcher, not least because it puts you on the receiving end of library query-handling and the library user experience in general. If you leave a library muttering, "They're all so LIBRARIANLY" – and that's not really a compliment – stop and ask yourself what exactly you disliked about the experience. Were they welcoming? Were they keen to help? Were they heavy on rules and procedures? Did you feel as though you were being restricted in some way for no apparent reason? As a librarian myself, I totally understand the need for rules and policies, but as a researcher, I can also understand that libraries need to take care not to appear obstructive.'
(Karen McCaulay, Royal Conservatoire of Scotland)

⚠ To think about

Before you visit another library as a secret shopper, decide what you hope to achieve. You will experience this library as an external researcher – are you looking for approaches you can adopt in your own situation? Perhaps you will be able to identify processes and procedures which are common in your own library, but seeing them through the eyes of a researcher, rather than a librarian, can cause you to reflect on their efficacy.

Consider also the ethical issues of this situation. If, as a secret shopper in another library, you have a poor experience, will you pass that information on? If you are recruiting secret shoppers from within your research community, what do you need to say to your own LIS staff?

References and further reading

Kocevar-Weidinger, E., Benjes-Small, C., Ackermann, E. and Kinman, V. R. (2010) Why and How to Mystery Shop Your Reference Desk, *Reference Services Review*, **38** (1), 28–43.

Acknowledgements

5.7 Become an embedded librarian

THE TERM 'EMBEDDED LIBRARIAN' is relatively new, but the concept itself is not; as long ago as 1985, Neway (1985) investigated how librarians could move from being passive providers to being proactive members of research groups. Carlson and Kneale (2011) describe embedded librarianship as 'taking a librarian out of the context of the traditional library and placing them in a setting that enables close co-ordination and collaboration with researchers'. In this context, librarians might be involved in collating data as it is produced,

making data available, literature searching and dissemination and in joint funding bids. Being located in an academic department allows a librarian to have a much closer relationship with stakeholders.

However, as McCluskey (2013) points out, even when a librarian is integral to the research team, the role relates to information searching and management, rather than research itself. Drewes and Hoffman (2010) consider that it's both the physical and the metaphysical location of librarians that defines them as embedded: librarians (and researchers) perceiving them as an insider in the research community. Librarians may be integrated into the research community on multiple levels, in different arenas, both physically and virtually and in different ways with different groups. As with so many aspects of engagement with the research community, there is no simple model to follow.

An embedded librarian is not the same as a departmental librarian; this long-standing model of providing branch libraries in academic departments relates much more to physical stock and space, whereas an embedded librarian, as part of the research team, will not have a physical library location at all.

An embedded librarian should be seen as a partner in a research enterprise. For many librarians this may be uncomfortable or challenging – certainly it is an expensive approach for the library. In practice librarians may struggle to find enough to do and the relationship also requires a big shift in perception from researchers. An ideal embedded librarian has been described as being creative and flexible, possessing excellent interpersonal skills and having a capacity to thrive in traditional and non-traditional settings (Kesselman and Watstein, 2009). David Shumaker details many issues that need to be taken into account in his book, *The Embedded Librarian* (Shumaker, 2012).

👍 Best for:

■ providing highly tailored services to specific research groups
■ changing perceptions of librarians and their role
■ engaging with the research community.

★ Examples from practice

Helsinki University Library, Finland

Helsinki University Library used an approach called 'knotworking', described as a 'boundary crossing, collective problem solving way of organizing work' (Engeström et al., 2012). The idea is to identify a specific problem, or knot, and then for researchers and librarians to work through it together, so that 'continuity

is connected to the object, not the people'. This innovative approach involves commitment from all those involved and ensures that a true partnership develops as the collaborators work towards a solution.

Sheffield Hallam University Library, UK

Melanie Gee describes her role embedded within a research team:

> *'My job title is "Researcher (Information Scientist)": my role is a "tame" information professional within a research centre. I have been in this role for four years. Initially this service was bought in from the university's Learning and Information Services so I was line-managed by an Information Specialist (academic librarian) in the Learning Centre, although I was based in the research centre myself. Just over a year ago my line management transferred within the research centre, and I am now line-managed by a professor in the centre.*

> *The role is something of a cross-over between "academic librarian offering a service" and "researcher bringing in money": I am involved in research projects, by virtue of doing literature searches for input to project proposals and for actual funded projects; I am increasingly becoming involved more deeply, e.g. at the moment I am undertaking a realist review myself in order to feed into an evaluation. I am also involved in training for staff and PhD students, in literature searching, reference management, information management, bibliometrics, choosing where to publish, etc. – some of which overlaps a little with what is offered centrally, but the training I provide is a little more in-depth and tailored to the research group I support. I also handle some fairly basic enquiries about e.g. our reference management software (RefWorks) or getting hold of the full text of papers, just by virtue of being to hand.*

> *I am now pretty well established in the research centre and have a steady stream of work (often too much work!), but I found that my reputation had – not unreasonably – to be earned.' (Melanie Gee, Sheffield Hallam University)*

⚠ To think about

Developing an embedded librarian model must be a strategic decision for the library. Staff who remain based in the library need to be aware of the concept and understand what you are doing so that they can also contribute; being embedded does not mean being isolated from other librarians.

Persuading researchers of the value of including a librarian in their team is one of the most common concerns. Changing perceptions of roles may take a long time. To justify this approach you need to be able to demonstrate what an embedded librarian can add to the research outputs in terms of value.

If you are aiming to be an embedded librarian think about how you can truly

be a team player and what your role in the team will be.

> *'Having the confidence to question what researchers say they want can be difficult at first. When I first started in the job I tended not to question what the researcher was asking me to do – I would just create the search strategy, run the searches and deliver the results, which were of course exactly what they asked for, but often running to several thousand results when what the researcher really wanted was a couple of hundred. It was a bit soul-destroying to realize, months down the line, that the researchers were so overwhelmed by the volume of results, that they had not engaged with them at all and reverted to doing their own Google searches instead!' (Melanie Gee, Sheffield Hallam University)*

References and further reading

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Acknowledgements

5.8 Go on tour

IT'S OFTEN ONLY in informal discussions that library staff are able to publicize all the ways in which they can facilitate the research process but as more

and more material becomes available electronically researchers have less need to visit the physical library and opportunities for serendipitous conversations between library staff and researchers become fewer. From a researcher's perspective all may be well; researchers often operate in a 'satisficing' mode, finding what is quick and easy to satisfy an information need, and they may well believe that is all the library offers. It's easy to see how relationships can become more distant. If researchers are no longer visiting library spaces, then it makes sense that librarians need to spend more time in research spaces, but this is not as simple as it sounds. Librarians are busy people too – we don't have time to wander around our organizations in the hope of connecting randomly with researchers; if we are to go 'on tour' this needs to be planned in a more strategic way.

Researchers and research groups will have regular meetings, either within the group or at a departmental and organization level, and it's crucial that the library is represented at such gatherings: if not attending every one, then at least with the expectation of being present occasionally. Research administrators may be able to facilitate entry to such a group and it helps to present them with a specific reason for attending, even something as vague as ensuring all researchers are aware of new resources and developments in the library. Never attend such a meeting without something to say; people will soon start to value your contribution and expect your presence if you can contribute in a positive way.

> 'Offer to present at the School's seminar series on scholarly publishing.' (Nicola Foxlee, University of Queensland, Australia)

Attending meetings, however, only puts you into contact with a small number of representative researchers, and so you need other strategies to reach the wider group. One possibility might be to devise an informal 'tour schedule' and publicize this ahead of time, noting where you will be, what kinds of questions you can answer and what you hope to achieve. Badging this as a tour, mobile librarian or pop-up library can give it a brand which people can remember and relate to and will raise the profile of the library too.

Alternatively, make a list of all the key research groups and contact them directly, explaining that you want to come and meet them to find out more about their research, tell them what's happening in the library and discuss ways you can work together. This could become an annual event, raising expectations amongst researchers that the library often has something new to offer.

👍 Best for:

- making services more visible and convenient for researchers
- contacting the research community and building relationships.

★ Examples from practice

Library Research Forum

'We have been doing our Library Research Forum events for the last few years and now academics seem to expect them. We work out a programme in the summer months, usually June and July, with a mix of short talks and consultation desk sessions, and we hold them in different places around the campus. So one week there may be a session in the engineering department on finding your h-index one day and the next day we'll just set up a laptop in the coffee area and answer questions on anything. The next week we might be in the history department with a talk about archive materials and also the help desk. We try to make it varied and check with the different departments about when will be best for them, though anyone can come to any talk – they are advertised on posters and leaflets and we do get engineers coming to the archives talk, for example.' (Librarian, German University)

Welcome events

Staff at one university library always attend the postgraduate welcome events in the Faculties, setting up a stall with free pens and notepads to attract visitors and providing information about the workshops and other ways in which they can help new research students with their research. The informal atmosphere enables relaxed conversations and encourages students to sign up for the programme of workshops offered by the library. In addition, for academic staff induction events, library staff set up a similar stall, with material tailored to the different level of staff attending.

⚠ To think about

If you plan to go on tour make sure you consult with researchers and administrators over the best times and locations to maximize impact. Publicity is vital, whether by e-mail, social media, posters or leaflets, and a reminder a few days before is useful too.

Don't be discouraged if attendance is small initially:

'We made the decision right from the start to plan a whole summer programme and to repeat it the next year, even though sometimes only a few people came at the start. We

reckoned it would take some time for people to get to know what it was all about so we persevered. It was hard to justify sometimes but now people even ask when we are starting and seem to look forward to it and come back each year. It seems now that they are suggesting things we might do, too, and that is good, as it feels they are owning it themselves.' (Librarian, German University)

5.9 Join virtual research communities

SUBSEQUENT TO THE development of virtual learning environments (VLE) has been the development of virtual research environments (VRE). In essence, a VRE, or virtual research community, is an online space in which researchers can operate collaboratively. Similarly to a VLE, a VRE may offer space to host documents, collaborative tools such as blogs and wikis and resources to help, for example, with writing and publication. Some VREs are institution-specific and hosted behind firewalls, whilst others are more open.

Jisc define a VRE as 'a set of online tools and other network resources and technologies interoperating with each other to facilitate or enhance the processes of research practitioners within and across institutional boundaries'(JiscInfoNet, 2014).

Libraries have worked with VLEs for many years, so translating similar practices across to a VRE is not difficult. However, often this simply comprises links to resources and in a research environment there are other opportunities for engagement. Librarians can contribute to the development of the environment itself, advising on the use of metadata to enhance discoverability (Carlson and Yatcilla, 2010). As members of the community we can engage in debates, actively suggest resources and practices and advise on specific issues as they arise.

The main problem can be discovering where the researchers are in the first place. Are they operating within a VRE and if so which one(s)? If your organization provides a local facility, it may be possible to find out how it is being used and to get a list of research groups involved.

Social media tools such as LinkedIn and ResearchGate also operate as VREs for some researchers, so registering with these will also enable you to see how researchers are communicating and, as a minimum, can raise your own profile within the community.

👍 **Best for:**

■ meeting researchers in their own space
■ building relationships with researchers
■ making services more visible and accessible for researchers.

★ Examples from practice

Purdue University

Purdue University Library in Australia worked with the developers of CAT-Hub, a VRE for researchers working with assistive technologies, to develop tags within the VRE to enable users to more easily find resources within the platform (Carlson and Yatcilla, 2010). Librarians used their knowledge of controlled vocabularies to contribute to the development of the environment, thus contributing in a practical way to the research itself.

University of Westminster

In response to a research exercise carried out with researchers, the University of Westminster in the UK developed a VRE in order to 'build a series of solutions' to the issues identified. The VRE contains comprehensive details of all members of the research community. It details all doctoral research projects and additionally contains useful documentation such as ethics forms. Researchers are able to upload their research outputs into the VRE, which then feeds the institutional repository. The University now has a much more accurate picture of research activity and is benefiting from timesaving and transparency (Enright, 2015).

⚠ To think about

In a closed, local VRE, you may need to be invited to become a member. Ensure you are able to demonstrate the value your presence will offer by detailing specific ways in which you might be involved. Be careful, once you are part of the community, to find your place and contribute appropriately, not too much but not too little either; the idea is not purely to lurk and listen but to actively engage and to show the value the library can add to the research process. The aim is for researchers not to think it's unusual to have a librarian in their space, but to assume this is normal.

References and further reading

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The Jisc website has examples of VREs linked to specific stages in Jisc's research lifecycle model and its VRE Knowledge base links to examples of VREs from around the world.

5.10   Provide for visiting scholars

IT IS INCREASINGLY common for researchers to collaborate with colleagues from around the world and researchers at your organization will frequently be hosting visiting scholars from elsewhere. In addition, if your library has a particularly valuable collection of resources, that in itself will attract researchers from far and wide. Many libraries have a well defined mechanism for enabling access to their specialized resources, even if it simply comprises access to the building and appropriate reading space. It is less common, however, to find well articulated policies aimed at those scholars visiting existing researchers within the institution, especially if they are visiting for a short period of time. Visiting scholars may feel isolated and access to the local library facilities is a familiar environment.

Developing such a policy, maybe even providing a welcome pack, is a relatively inexpensive way of demonstrating the library's value and can be very valuable in building relationships with the research community. Researchers want to be proud of their local library and being able to present their visiting colleagues with a friendly introduction to it is a welcome bonus. To be cynical, it can be seen purely as a marketing ploy, bringing together existing services and presenting them in such a way as to suggest a special service.

👍 Best for:

- raising the library's profile in the research community
- demonstrating the library's value to the wider research community.

★ Examples from practice

American libraries

There are several examples of visiting scholar information in US libraries, relatively few from elsewhere. At Berkeley University and the University of Washington, for example, services are aimed at those with official, short-term status:

The Library provides borrowing privileges and other services to our community of visiting scholars and postdocs. Visiting scholars must receive official appointments with a UC Berkeley Department or Organized Research Unit, and register with the Visiting Scholars and Postdoc Affairs (VSPA) Program.

www.lib.berkeley.edu/information/visiting-scholars

To obtain borrowing privileges as a 'Visiting Scholar' individuals must be designated as such by a University of Washington academic department.

www.lib.washington.edu/services/borrow/vscholar

At Penn State the definition of a visiting scholar is more inclusive:

The Libraries defines 'visiting scholars' or 'visiting faculty' as faculty users who are not employed by Penn State, but are visiting from other academic institutions for the purpose of short-term instruction, research, and scholarship.

www.libraries.psu.edu/psul/lending/visitingscholars.html

SCONUL Access

In the UK and Ireland, the SCONUL Access Scheme allows reciprocal access and borrowing rights to staff and postgraduates from other universities which participate in the scheme:

SCONUL Access is a reciprocal scheme which allows many university library users to borrow or use books and journals at other libraries which belong to the scheme. The scheme covers most of the university libraries in the UK and Ireland.

If you are:

- a member of staff (both academic and support staff) on an open or fixed term contract
- a postgraduate research student registered for a PhD, MPhil or similar qualification
- a part-time, distance learning and placement student
- or a full-time postgraduate

and your university or college is a member of the scheme, you may be able to borrow from other college or university libraries.

www.sconul.ac.uk/sconul-access

A welcome pack

What to include in your visiting scholars' welcome pack – this can be an actual pack, a leaflet, a web page:

- a short welcoming statement
- specific information on library access and opening hours backed up by a practical policy, e.g. visitor passes specifically for visiting scholars
- specific information on borrowing rights, access to electronic resources
- details of library staff, such as subject specialists and liaison librarians
- information on how to get help
- brief details of specialist collections.

⚠ To think about

In universities, the term 'visiting scholar' may have a specific meaning within the institution, so any policy developed by the library must clearly define who is included in the description. Is the policy aimed at short-term visitors or do visitors need to have official status within the organization? Can you differentiate services to different users?

It's important to articulate very clearly what visiting scholars can and can't do in order to manage expectations. Of course, you won't be able to anticipate every request, but you can predict the most common, often relating to access to electronic resources, downloading and copyright!