Designing a Holistic Research Appointment Service: Utilizing an Online Feedback Form to Create Best Practices for Research Appointments

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In 2018, the subject librarians at the University of Maryland, Baltimore County (UMBC) came to the realization that though we occasionally talked about our concerns with the practicalities and logistics about how we were conducting research appointments, we did not engage in any formal discussion or planning around the process, content, or outcomes of these appointments. Research appointment interactions—conversations between a librarian and a student or faculty within their discipline—were overwhelmingly scheduled individually. We acknowledged that we had no shared understanding of how best to conduct these interactions, and that we might be providing very different experiences for our users. Thus, we decided to undertake a project that would have two sequential primary goals.

1) Shift our practice to becoming less transactional and more intentional, by investigating the user experience, particularly whether or not our consultations included practices that would lead to feelings of increased agency for students over their own learning.
2) Create shared best practices, and substantive discussions around them, as a means to ensure quality and meaningful experiences for participants

Literature

The literature includes several recent articles that explore the patron experience during a research appointment (which can also be referred to as a consultation) with a librarian. Reiter and Cole (2019) examined the impact of research consultations on student confidence in their research skills, along with student perceptions of librarian approachability and helpfulness. Their findings suggest that individual and small-group consultations increase students' research confidence and create a shift in their perception of the approachability and helpfulness of library personnel. Rogers' and Carrier's (2017) qualitative investigation found the need for greater marketing of the service and illustrated the value students placed on the individualized support provided by a librarian. Cox, Gruber and Neuhaus (2019) explored the use of data about research consultations and student success as an effective means of demonstrating library value through increased academic achievement. They found some connection between students' participation in consultations and their achievement of higher course grades. Other research, including Hess (2014), and Maddox and Stanfield (2019), focused on how libraries can increase ease of marketing, scheduling, and access to research consultation services by optimizing technology.

With our project, we look to add to this valuable body of literature by demonstrating how we can improve our practice by investigating the user experience, having guided conversations with colleagues around the findings from a feedback form, and creating shared best practices. What differentiates this project from others is its holistic approach in examining both the user experience and the provider (librarian) service. We explore the entire process from both perspectives in order to improve the overall experience.

Research Appointments at UMBC

From January 2015 through December 2019, subject librarians conducted 1,107 research appointments. Most of the appointments occurred within the first three months of each academic semester, primarily between 12-3pm. Seventy-eight percent of the appointments were in person, 21% were via email while virtual appointments represented just 1% of total contact type. Eighty-eight percent of research appointments were with students, while faculty/staff represented only 9%, and the remaining 5% were classified as unknown. The top three academic departments that received research appointments were History, English and Interdisciplinary Studies. Prior to this project, the reference department did not collect information about how students heard about the research appointment service, but we assumed that most learned about it from their class instructors.

Design and Implementation

In January 2019, we identified project goals, drafted a timeline, and created a feedback form in LibWizard, a platform the library already owned and used. For the pilot phase of the project, the form was integrated into the LibCal scheduling platform and sent as an automatic follow-up email to those who scheduled appointments through the virtual widget enabled by this system. This method constituted the majority of our research appointments, but did not include those scheduled by email or in person. The pilot ran during the Spring 2019 semester.

Following the pilot, in early May 2019, we reviewed the feedback form responses, identified major themes (appreciation for the service and needing greater clarity of appointment location), and created a report that was shared with the reference department. This enabled us to transition to Phase II of the project. During Phase II, the feedback form was used by all patrons who made appointments regardless of how they scheduled their research appointments (i.e., not just LibCal, but also by email, chat, and walk-ins).

In August 2019, a basic rubric was created to evaluate feedback form responses. The positive feedback replies were separated from the negative/critical. Afterwards, the negative/critical feedback were individually reviewed to identify possible solutions. Next, we created a first draft of the best practices based on recommendations gleaned from the feedback form data. After presenting them to the department, they were then revised based on the discussion that ensued.

The primary concern the department expressed was that the original feedback form did not explicitly ascertain what patrons found useful during the appointments. Incorporating our colleagues' suggestions, the revised form now had seven quantitative and qualitative questions and focused more on what happened during the appointment rather than how it came about

1) How did you know to schedule a research appointment?
2) Why did you schedule this research appointment?
3) Was this appointment to support a specific course or major?
4) Do you feel you have a better understanding of your research needs and/or the library's resources?
5) How likely are you to use and/or recommend this service again?
6) What did you find most helpful about this research appointment?
7) How can we improve this service? Additional questions/comments.

Question six provided insight into the patron's experience during the appointment. Respondents could select from the following (all that applied):

- The librarian gave me the opportunity to brainstorm and discuss ideas and concerns
- The conversation and presentation were well paced for my needs
- The librarian listened to me and modified delivery and content, as needed
- I feel like I was given the tools to work independently, using the skills I learned
- I left feeling I can return to the librarian with additional questions or concerns
- Other (please describe)

Question six helped identify what patrons found most helpful about the research appointment while simultaneously helping us design our best practices. The feedback form continued to be shared with patrons and in December 2019, the best practices were finalized and shared with the department.

Best Practices Developed

A summary report was created, based on our review of a semester's-worth of results for both the pilot and for the revised version of the feedback form, and shared with our colleagues. These reports included a synopsis of individual question results, comments and kudos, and suggestions that we could implement for improved services. Sharing these reports allowed us to lead guided discussions with our colleagues on each of our general approaches to providing research appointments. The best practices were thus developed from the feedback form data and the ideas generated during these discussions, and are organized according to the stage of the appointment (before, during, and at completion). We recognized that for the best practices to be useful and utilized, they would need to be clear and succinct. The final version of the best practices is as follows:

Before the Appointment

- Check the auto-generated appointment email to determine if the appointment is online or in person. *Note, the separate, auto-generated Google calendar event is* ***not able to*** *specify if the appointment is online.*
- For online appointments, add Google Meet video conferencing and share this Google event invitation with the appointee. Provide basic information about how to use Google Meet and what to expect.
- Appointments arranged through the scheduling software will automatically get a reminder email one day before the meeting. For appointments arranged outside of the scheduling software, you'll need to send a reminder email to the appointee one day prior to the meeting.

Note, when a student schedules a research appointment, they are automatically asked the following questions: 1) What assignment do you need help with? 2) What would make the appointment feel successful for you? 3) Do you require any accommodations?

During the Appointment

- Begin by asking a few open-ended questions to ascertain where the appointee (i.e., the student or faculty member) is in the process, their comfort level, and their particular research needs.
- Provide the appointee an opportunity to brainstorm and discuss ideas and concerns.
- Tone, response and body language can be useful in determining if you need to modify delivery, pacing, and presentation of content.
- Check in with the appointee regularly for understanding.
- Ensure that the appointee has the tools to work independently after the session by using the skills they are learning or reviewing.
- Assist and provide guidance on note taking and saving/capturing content.
- Be mindful of time throughout the meeting. As you approach the end of the scheduled time, give the ap-

pointee a five-minute heads up.

Finishing the Appointment

- Remind the appointee they can contact you with additional questions and get help at the Reference Desk.
- For appointments scheduled outside the scheduling software, send the feedback form via email.

It is important to us that these best practices be used for improving the overall research appointment experience, both for librarians and patrons. We plan on collecting and reviewing responses from the feedback form for the foreseeable future. The feedback has helped us identify issues and areas for improvement with the service, such as appointee confusion about how online meetings will occur. Following changes of practice (such as building into the process specific follow-up information for online appointments), feedback in these areas has improved. Additionally, we include a brief discussion of portions of the best practices during regularly scheduled departmental meetings. We also plan on doing regular reviews of the whole document.

Feedback from Librarians, Students and Faculty

Incorporating the feedback form and implementing the best practices to the department's workflow has been seamless. We have not experienced any technical issues nor have we had difficulties generating reports from the platform. Furthermore, a review session of the best practices has been embedded to our beginning of the semester checklist.

The responses in the feedback form have been overwhelmingly positive. Patrons have expressed high satisfaction with the service, improved confidence, and an appreciation of the knowledge and interactions with librarians. One patron responded to question six with "I feel like I was given the tools to work independently, using the skills I learned; I left feeling I can return to the librarian with additional questions." Another said, "The librarian gave me the opportunity to brainstorm and discuss ideas and concerns." Others commented on the variety of sources they are now able to find and how helpful the librarians were.

Next Steps

The COVID pandemic has drastically changed our work, requiring us to move all of our research and instructional services online. Subject librarians are conducting all research appointments virtually (primarily through Google Meet). Fortunately, having already switched to an online form provided us a tool that can be utilized just as effectively for virtual interactions as it can for in-person. For example, feedback received through the online form had already alerted us to the fact that some students are not familiar with Google Meet or other virtual meeting tools, and the fact that clear and specific instructions on how the meeting would take place needed to be standard information sent to all appointees. The switch to online-only appointments required some immediate changes to our library's website and modifications within the LibCal system. Our messaging to campus now has to clearly state that in-person appointments are not available at this time, but online appointments are a reliable alternative. We anticipate that now that both students and librarians are regularly meeting virtually for a variety of reasons, many students will prefer to meet online for convenience and ease, even when in-person appointments resume.

Online-only appointments present new challenges (and some new opportunities) both for us and for our students. We recognize it will be important to continue this conversation as a department and to add to or modify our current best practices. Though much of the current best practices can apply to in person and virtual appointments, we hope to discuss and explore additional practices that could better support virtual students. We will continue to gather and analyze data using the feedback form. Lastly, we will investigate how to best market the research appointment service in the current environment where students are disconnected in many ways from the physical campus.

References

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