The purpose of this poster is to share an example of including users in library budgetary decisions. This poster will communicate our approach to assessment of RefWorks that was guided by our desire to include the users in the decision process. We will present our methodology of survey, focus groups and structured dialog. Although our methods are not original, our application of these methods to the library decision to renew or cancel is unique.

Survey Findings

<table>
<thead>
<tr>
<th>User Group</th>
<th>Preferred Citation Tool</th>
<th>Representation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty</td>
<td>EndNote X9 (39%; 21 of 54)</td>
<td>Strong distribution across departments (8 in Nursing)</td>
</tr>
<tr>
<td>PhD Students</td>
<td>RefWorks (44%; 15 of 34)</td>
<td>Strong distribution across departments (8 in Nursing)</td>
</tr>
<tr>
<td>Master’s Students</td>
<td>RefWorks (54%; 13 of 24)</td>
<td>Mostly course-required uses</td>
</tr>
<tr>
<td>Undergraduate</td>
<td>RefWorks (65%; 15 of 23)</td>
<td></td>
</tr>
</tbody>
</table>

Focus Group Findings

User Input
- Advance notice to transition over summer
- Educate users about alternative tools
- Provide individual assistance
- Widely communicate around campus
- Library Response
- Negotiated 1-month extension of access post-cancellation to give users the whole summer to switch
- Created guide with comparison chart
- Publicized consultation service with cancellation notices
- 9-month communication plan including email to account holders, blog posts, LCD slides for campus monitors, and social media posts

Methodology

Survey: We built knowledgeable background by analyzing usage reports and the trends at peer institutions and Big Ten Academic Alliance before proceeding to the survey of users. The survey was designed with six questions about citation management tools, preferences in features and technical support, and optional information about the user status and contact for further feedback. The survey was conducted from August 11 until August 31, 2019. It was distributed to all 2,313 RefWorks account holders (except for library staff) via an invitation sent by library contacts to academic departments, via Provost’s Monday Update, and a blog post on the Libraries’ website.

1. Which is your preferred citation management tool?
2. Why did you choose this citation management tool?
3. What are the most important features for you in a citation management tool?
4. How often do you use citation management tools?
5. How important to you is the use of a citation management tool?
6. How important to you is library support of citation management tools?

Focus Group: 19 faculty and graduate students of the 60 RefWorks users from the survey provided contact information for follow-up. With a personal invitation to the survey participants and a few more to the active users of RefWorks, the focus group included 8 attendees (5 faculty, 2 lecturers, and 1 graduate student). The group met for an hour on January 13, 2020. The taskforce devised a set of questions to elicit input on how best to transition away from RefWorks with sensitivity to user concerns and research needs. It was conducted by a facilitator and a notetaker. We closed the session by giving each participant a print copy of our initial report.

1. If we were to cease subscribing to RefWorks, how would you like to be informed of that decision?
2. If we were to cease subscribing to RefWorks, would you continue to use a citation management tool?
3. If we were to cease subscribing to RefWorks, how would you decide where to migrate your content?
4. Is there anything else you’d like us to consider or be mindful of as we continue our work?

Conclusion

- The growing number of citation management tools available allows people to make a choice based on their own criteria.
- Our library continues to play an advising role with students and faculty by curating self-paced tutorials designed to help users select a citation management tool of their choice.
- Involving users early and often in the process resulted in gaining an authentic understanding of use, raising awareness of library contributions and constraints, and diffusing alarmist reactions to cancellation.
- We encourage more libraries to adopt an inclusive approach to budgetary decisions that honors the communities they serve while demonstrating their effective stewardship of resources.

Bibliography