

## PURPOSE

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.

## OBJECTIVE

User Services librarians took the lead in evaluating RefWorks in our 2020 cancellation exercise. We decided to include user voices in this budgetary decision, not just user data. Our aim was to gather sufficient information to decide how best to transition away from RefWorks and determine how best to provide citation management support to our users.

## APPROACH

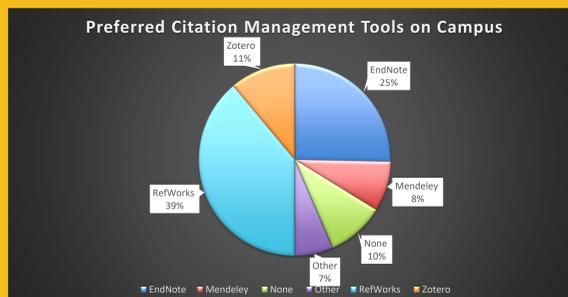
We planned for a multistage process of gathering, analyzing and communicating. We began with a thorough review of campus use, citation manager trends and researcher needs, followed by a survey of account holders and focus group with a select group of faculty and graduate students who completed the survey. We invited all RefWorks account holders to complete the survey. Focus group participants consisted of survey respondents who were faculty or graduate students actively utilizing RefWorks. We designed a LibGuide for the transition and communicated the exit strategy via multiple channels.



## CONTACT INFORMATION

Kate L. Ganski [ganski@uwm.edu](mailto:ganski@uwm.edu) @ganski1  
 Svetlana Korolev [korolev@uwm.edu](mailto:korolev@uwm.edu) @Svetlana\_CINF

## SURVEY FINDINGS



User Preference by Status		
User Group	Preferred CMT	Representation
Faculty	EndNote X9 (39%; 21 of 54)	Strong distribution across departments (8 in Nursing)
PhD Students	RefWorks (44%; 15 of 34)	Strong distribution across departments (8 in Nursing)
Master's Students	RefWorks (54%; 13 of 24)	
Undergraduate	RefWorks (65%; 15 of 23)	Mostly course-required uses

## 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?

## FOCUS GROUP FINDINGS

User Input	Library Response
Advance notice to transition over summer	Negotiated 1-month extension of access post-cancellation to give users the whole summer to switch
Educate users about alternative tools	Created guide with comparison chart <a href="https://guides.library.uwm.edu/citation-managers">https://guides.library.uwm.edu/citation-managers</a>
Provide individual assistance	Publicized consultation service with cancellation notices
Widely communicate around campus	9-month communication plan including email to account holders, blog posts, LCD slides for campus monitors, and social media posts

## 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

1. Rempel, H. G., & Mellinger, M. (2015). Bibliographic management tool adoption and use. *Reference & User Services Quarterly*, 54(4), 43–53. <http://dx.doi.org/10.5860/rusq.54n4.43>
2. *How to Conduct Focus Groups*. (n.d.). The Interaction Design Foundation. Retrieved October 22, 2020, from <https://www.interaction-design.org/literature/article/how-to-conduct-focus-groups>