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Rework the Network: Implementing Virtual Outreach Methods in the COVID Era

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Abstract

The COVID-19 pandemic forced academic libraries to be innovative and efficient in shifting to support online learning. While there has been much discussion of online teaching resources and tools among librarians and educators, there has been less of a focus on online outreach and virtual networking. This article presents a case study describing how a new liaison librarian used virtual outreach to build relationships in her liaison subject area, leading to opportunities for research assistance and instruction despite the challenges of starting as a new librarian in the midst of a global pandemic.

Article Type: Case study

Introduction

The COVID-19 pandemic completely transformed the global landscape. Universities and academic libraries were already increasing their focus on online learning, but COVID forced a quick transition to teaching and learning in an online environment. The pandemic expedited and necessitated innovation and technological advancement in academic libraries as services pivoted to hybrid and online models to protect the safety of students, faculty, and staff. While there has been a lot of focus on online teaching and learning among librarians and educators, there has been less of a focus on online outreach and virtual networking. Outreach and relationship building are the foundation of the work academic liaison librarians do as they lead to opportunities to support teaching and learning in liaison subject areas. Because of the COVID-19 pandemic, traditional networking and outreach had to be reworked for the online environment.

The author started a new position as the Business Research & Teaching Librarian at the University of Louisville in the midst of the COVID-19 global pandemic. This article is a case study based on the author's exploratory research of how to build relationships in her liaison subject area while working remotely. In this exploratory study, the author discusses three virtual outreach methods she created: Virtual Power Hour, Chat Technocrat, and Pitch Switch. This article begins to fill the gap in the literature about online outreach and virtual networking. It highlights the importance of proactive, adaptable, and innovative outreach in academic libraries.

Literature Review

Distance learning became the norm during the COVID-19 pandemic, but distance learning is not a new concept in librarianship. The Association of College & Research Libraries (ACRL) first established guidelines for distance learning in

1963. These guidelines became the Standards for Distance Learning Library Services in 2008. While the standards state that “distance learning and online learning are not synonymous,” there was a conflation of the two when the COVID-19 pandemic shut down dormitories and forced students, faculty, and staff to disperse, socially distance, and meet online. The ACRL Standards for Distance Learning Library Services make it clear that “the library has primary responsibility for making its resources, services, and personnel available to its users regardless of their physical location” (ACRL, 2016). This responsibility is impacted not only by the physical location of users but by the physical location of librarians. Historically, reference and liaison librarians sat behind a public-facing reference desk and “performed the role of connecting people to the information they needed in a visible way.” (Johnson, 2019, p. 91). As technology has advanced over the past half-century, library reference and engagement models have shifted in response. Because of “the decentralization of physical resources and the expansion of the Internet,” libraries “have been transforming their user service models over the past three decades” (Weeks et al., 2020, p. 44). There is now a “continuum of librarian visibility” that has rendered outreach a central component of academic librarianship (LaRue, 2010, p. 10).

The Reference User and Services Association (RUSA) first named outreach as a core component of liaison librarianship in 2001 (Borrego et al., 2020). The outreach model has evolved over the past twenty years. Traditionally, outreach provides “an opportunity to include and educate library users, campus as well as community residents, on various subjects as well as demonstrate the library’s value to the academy” (Blummer & Kenton, 2019, p. 180). There have been varying degrees of resistance to this model, including that “some faculty members are reluctant to receive instruction from librarians” (Reeves et al., 2003, p. 61). The traditional outreach model has been shifting towards a “curiosity-as-outreach” approach in which academic liaison librarians move away from the “look what we can do for you” model of outreach and instead venture outside of the library to visit “people, places, and services on

campus” to ask “what do you do, how do you do it, and why do you do it?” (Borrego et al., 2020, para. 3). By asking different questions and conducting outreach to educate themselves rather than offering a one-size fits all approach to library services, academic liaison librarians are able to create a “more organic and extended interaction” to “build social capital that shares the traditional objectives of outreach” (Borrego et al., 2020, para. 10). Through building these relationships and social capital, librarians maintain their visibility and become “essential partners in knowledge creation” who “must be visible” and “must be at the table” for their “long-term survival” (Case, 2008, p. 145).

To conduct effective outreach, “getting the librarians out of the library and mingling with the rest of the college community” is essential (Reeves et al., 2003, p. 63). There are examples in the literature of “waiting in line at a Thanksgiving potluck” and speaking with “faculty members about courses they are teaching and preparing, their research interests, and books they would like the library to purchase” (Reeves et al., 2003, p. 63). The literature discusses how “newer virtual reference services are transforming the ways in which librarians reach out to their patrons” (Whatley, 2009, p. 30). However, the literature is lacking in how liaison librarians can utilize virtual services to conduct outreach in the online environment. There is little guidance on what a conversation with faculty in line at the Thanksgiving potluck can look like virtually. This case study aims to demonstrate how academic liaison librarians can build and maintain relationships in their liaison subject areas in the virtual environment.

Background

The University of Louisville is a public research university located in Kentucky’s largest metropolitan area. The University serves over 22,000 undergraduate, graduate, and doctoral students. The University Libraries span two campuses. Ekstrom Library houses the Research Assistance and Instruction (RAI) department where liaison librarians work with a variety of subject areas on the University’s central academic campus.

In response to the COVID-19 pandemic, the University of Louisville and University Libraries pivoted to a hybrid model of teaching and learning. The majority of courses and services were offered online. The University Libraries had a number of virtual services and tools in place before the pandemic that were expanded and saw an increase in use in response to COVID-19. Microsoft Teams, which was available pre-pandemic but under-utilized, became the main communication hub for departments across the University Libraries. The Dean of Libraries held weekly town hall meetings to foster virtual opportunities for connection and communication during an unprecedented time.

The author began her new role as the Business Research & Teaching Librarian at the University of Louisville in October 2020. The RAI department was operating almost entirely online, offering virtual instruction, research appointments, and reference.

Approach and Methods

A major challenge for a new liaison librarian who started during the midst of a global pandemic was building relationships with faculty and students when there were no opportunities for in-person engagement. The author had to develop virtual outreach methods to engage faculty and students in her liaison subject area, the College of Business. This virtual outreach set the groundwork for instruction sessions and research appointments as well as faculty research support and community consultations. The methods also served a more strategic purpose: to rework for the online environment those informal networking opportunities that happen at in-person events and often lead to serendipitous collaboration.

The Head of RAI initiated virtual networking opportunities for the author as a part of her orientation. Meetings were scheduled with representatives from various departments across the University Libraries. These pre-planned meetings offered an excellent introduction to the services offered by the University Libraries and an opportunity to meet colleagues despite

working from home. Beyond the first three weeks of orientation, there were less opportunities for these informal virtual conversations. While the author had a better understanding of the libraries, it was essential as the Business Librarian to build relationships with the students, faculty, and staff in the College of Business. The author developed three virtual outreach methods to build these connections: Virtual Power Hour, Chat Technocrat, and Pitch Switch.

Virtual Power Hour

The idea of a “virtual power hour” is to replicate the informal networking opportunities provided by speaking with faculty at an event or a student coming by the reference desk. Virtual Power Hours can be one-shot or recurring events that do not require registration or have formal agendas. Hosting a Virtual Meet and Greet for College of Business faculty and Virtual Office Hours for students was the primary focus of the author’s virtual outreach in her first semester as the Business Librarian.

The author held a Virtual Meet and Greet for the College of Business one month after she started working at the University of Louisville. The meet and greet was intended to be an informal, drop-in event with no set activity or agenda. It was an opportunity for College of Business faculty to meet the new Business Librarian. The planning and outreach for the event was simple. The Business Librarian decided to hold the meet and greet on a Friday afternoon and created a Microsoft Teams meeting for the event. Good advertising is essential for marketing outreach events. The author created a flyer using the free web tool Canva (Figure 1). The flyer included an embedded Microsoft Teams link for the event.

To advertise the event, the author emailed the flyer to the Dean of the College of Business. This was a great way to introduce herself to the Dean and reach the entire College of Business. The Dean forwarded the introduction email and flyer to the faculty listserv for the College of Business. He encouraged everyone to attend and promoted the Business Librarian as an important resource. This advertising strategy had its advantages and disadvantages. The author

received a robust response to the email. Several faculty and staff emailed to introduce themselves and welcome the Business Librarian to the University of Louisville. Some faculty emailed to say they could not make the time of the event and asked to schedule individual meetings. The event was an hour long, and three faculty members attended. Nobody showed up for the first thirty minutes. Two people showed up almost simultaneously from different

departments in the College of Business. With five minutes left in the event, another faculty individually called the librarian on Microsoft Teams, rather than joining the event itself, and asked if anyone else would be joining. This illustrates some of the disadvantages to how the Business Librarian promoted the event.

Because of varying degrees of digital literacy, the embedded Microsoft Teams link in the flyer may have been unclear to some faculty. The day before the event, the author wanted to send a follow up email to the Dean's email reminding faculty of the meet and greet the following day. However, the author did not have permission to email the listserv. A

better option for advertising the event would have been to share the Outlook calendar event with the Dean, attaching the flyer and a clear link to join the meeting. If the Dean had shared the calendar event, this would have placed the event on the faculty members' calendars which could have served as an additional reminder and may have resulted in higher attendance.

After the Virtual Meet and Greet, the author followed up with the Dean of the College of Business to see if she could be added to the listserv. After navigating the College of Business administration, the Business Librarian was ultimately not granted access to the listserv. However, other virtual outreach opportunities were presented that the author did not anticipate. The Business Librarian was invited to a College of Business townhall and also given the

opportunity to submit announcements to the College of Business's weekly newsletter.

Ultimately, the Virtual Meet and Greet was a success despite a low number of attendees at the event itself. The purpose of the event was for the Business Librarian to start making connections and building relationships in her liaison subject area. By simply hosting and advertising the event, the Business Librarian gained visibility in the College of Business and was able to make connections through emails, individual Microsoft Teams meetings, and the Virtual Meet and Greet itself. Furthermore, the event provided additional virtual outreach opportunities the Business Librarian would not have otherwise

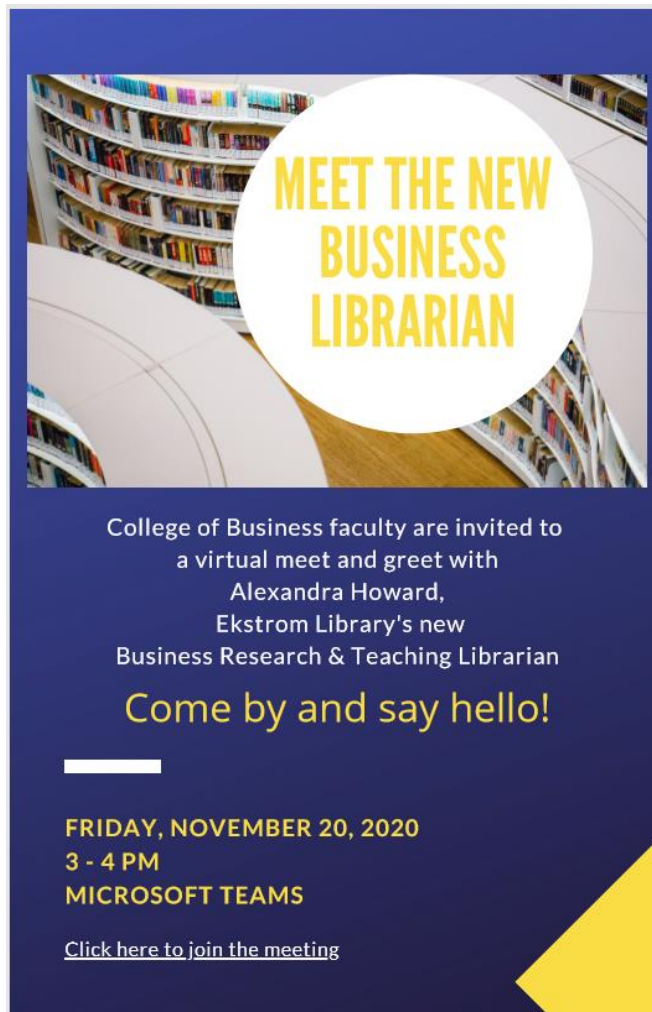


Figure 1 VIRTUAL MEET AND GREET FLYER.

known about. Because of the Virtual Meet and Greet, the Business Librarian was invited to teach library instruction sessions across different departments in the College of Business, asked to provide faculty research support, and asked to hold a consultation with a potential community partner.

The second "virtual power hour" the author instituted was Virtual Office Hours. The Virtual

Office Hours were planned for the following Spring 2021 semester, and the promotion and outreach began during the fall semester. The Virtual Office Hours were intended to be an informal, easily accessible, low-barrier way for students to ask questions and receive research assistance. Because of COVID, there was no in-person reference desk or in-person interactions with students inside or outside of the library. Virtual Office Hours took the impetus off the students to send an email or schedule a research appointment. Students could just click a link to join a Microsoft Teams meeting at a designated time and ask the Business Librarian any questions.

The Business Librarian discussed the Virtual Office Hours with faculty she connected with from the Virtual Meet and Greet. The faculty responded enthusiastically and several asked to put the Business Librarian's virtual office hours and contact information on their syllabi. This was an unintended outcome that not only increased the Business Librarian's outreach to students but also served to deepen the Business Librarian's engagement and relationship building with faculty. To determine the times of her weekly virtual office hours, the Business Librarian analyzed the course schedule for Spring 2021. It was important to ensure that the office hours did not conflict with the timing of the courses that promoted them. The next step was deciding how to advertise the Virtual Office Hours beyond inclusion on the syllabi for certain classes.

The author created a recurring event on her Microsoft Outlook calendar to generate a

Microsoft Teams link. Because the Virtual Office Hours would be held weekly, it was important to have the same link for each occurrence. The Business Librarian then used Canva to create a flyer advertising the Virtual Office Hours (Figure 2).

The author emailed the flyer to her faculty contacts in the College of Business. She also used her newly discovered virtual outreach tool, the College of Business's weekly newsletter, to advertise the Virtual Office Hours. The author worked with the University Libraries' Head of Web Technology to incorporate a link to the Virtual Office Hours in the Business Librarian's library profile. After sharing the idea of holding Virtual Office Hours in a RAI department meeting, the other librarians in the department decided they would also hold Virtual Office Hours in the spring semester. This helped increase the visibility and accessibility of the Virtual Office Hours. One of the concerns about the Virtual Office Hours was what would happen if someone needed to cancel their hours. To address this, a Virtual



Figure 2 VIRTUAL OFFICE HOURS FLYER.

Office Hours libguide was created using Springshare software. Every librarian had a page in the guide under their name. The time and link to each librarian's Virtual Office Hours were listed on their page. Each librarian had access to the guide and could edit their page if they needed to change or cancel their office hours. Virtual Office Hours links were added to all of the librarians in the department's profiles. These links went to each librarian's individual page in the Virtual Office Hours libguide.

The Business Librarian held her Virtual Office Hours consistently throughout the Spring 2021 semester. Unfortunately, no students attended the office hours. A faculty member who had the office hours listed on her syllabus did drop in to office hours once to ask a question. The other librarians in the department had similar results with their office hours, ranging from zero to one student in attendance all semester. Virtual Office Hours were instituted by other libraries during the pandemic, like the Medical Library at Tampa General Hospital (Castek & Novak, 2020). Rather than a liaison model with each librarian having their own office hours link, the Medical Library at Tampa General Hospital held general office hours with only one associated Teams link used by all the librarians. Librarians had scheduled shifts to monitor the office hours throughout the week. In their promotion of the Virtual Office Hours, Castek and Novak (2020) encouraged hospital employees to visit the office hours “to learn about the resources and services the library has to offer and to ask questions about how to access databases and utilize features like filters” (p. 369). While this was the intention behind holding Virtual Office Hours for students at the University of Louisville, it highlights an important component missing from the author’s promotion of Virtual Office Hours at her institution. As librarians and academics, it is easy to use professional vocabulary without providing context. Students may not understand what “office hours” mean, especially in the library context. If the RAI Department at the University of Louisville Libraries decides to continue holding virtual office hours in the future, it will be important to contextualize what this means and how this time can be utilized.

Chat Technocrat

Chat Technocrat is a virtual outreach method developed by the author that involves effectively navigating the chat feature during virtual events. Because there are no longer the networking opportunities that happen before or after in-person events, it is important to be strategic in how liaison librarians can utilize virtual event chats as an outreach tool. Virtual events can include speaker series, lectures by invited

guests, forums, town halls, and other programming adapted to the online environment. The chat is a tool librarians can use during these virtual events to increase their visibility and support information needs. However, there is a balance between engaging in the chat as an active participant and dominating the chat and potentially distracting from the event itself. Successfully navigating a virtual event chat is a skill, and it should be done with intention. Chat Technocrat is a simple method that provides guidance on how librarians can utilize the virtual event chat as an outreach tool.

Through observation and experience over the past year of the COVID-19 pandemic, the author generated best practices for navigating virtual event chats as a librarian. There are virtual events where it is appropriate to contribute to the conversation with an introduction, comment, or question. There are virtual events where it does not seem appropriate to utilize the chat unless asked to do so. The first step of Chat Technocrat is to do an environmental scan of the event. Have the presenters or moderators asked for attendees to introduce themselves? What direction has been given around asking questions or participating in the chat? If asked to do so or deemed appropriate after an environmental scan, the librarian should introduce themselves in the chat with their name and job title. This provides visibility among the attendees at the event and also contextualizes the librarian’s engagement in the chat for the remainder of the event.

The next step of Chat Technocrat is to carefully monitor the conversation and support the information needs of the event. If someone mentions a report or a book for example, the librarian can do a search to identify that report and share the link in the chat. Chat Technocrat requires accuracy and efficiency. It is important to share the correct link for a resource and to do so quickly to keep up with the conversation. If it takes too long to find the resource, then the librarian should not share it, but remain engaged in the conversation and be prepared to respond to the next information need that may arise. The environmental scan should continue throughout the virtual event. It is important that the visibility

gained through the Chat Technocrat method is positive rather than negative attention. There may be a moderator already providing links in the chat, and the librarian also doing this could become repetitive and confusing. The speaker may mention multiple resources, and if the librarian attempts to provide links to every resource this could become distracting. By monitoring the conversation happening on screen and in the chat, the librarian can use their best judgment as to when providing links to resources is most appropriate and useful in meeting the information needs of the event.

The Chat Technocrat outreach method serves several purposes during virtual events. It illustrates and reinforces the role of librarians as information professionals. It supports the speaker's communication of information and attendees' access to information. It increases the librarian's visibility. Every time the author has engaged in the chat this way or observed another person doing so, the information sharer has been acknowledged by the speaker or the moderator for the event. This makes the librarian an active and engaged participant in the event. An example of this is when the author used the Chat Technocrat method during a virtual talk given by the University of Louisville's new provost. During the question and answer session, the provost highly recommended a particular book. The author knew this was the perfect moment to utilize her role as librarian to provide access to this information. The author did a quick Google search for the book, found the publisher link for the book, and provided this link in the chat. Because she did this, the author was mentioned by name by the moderator of the event and thanked by the provost for sharing this information. The event was recorded, making the Business Librarian's name and the purpose librarians can serve a part of the permanent record of this event.

Pitch Switch

The final virtual outreach method is one the author is still developing and yet to fully implement. The idea behind this virtual outreach method, which the author named "Pitch Switch," is for librarians to create targeted pitches of their

services for different audiences using short, engaging videos. The idea for this outreach method is based on the author's work with business students. While the business world has several different types of pitches—business, elevator, entrepreneurial, venture—the most relevant to librarians using the pitch as an outreach tool is the elevator pitch. The elevator pitch is defined as "a ubiquitous, time-tested tool to create a strong first impression" that should generally last between six and sixty seconds (Sabaj et al., 2020, p. 57). It is important for liaison librarians to establish their own pitches that can quickly communicate their services in a compelling way to generate interest and buy-in from the different target groups in their liaison subject areas. The author defined three target groups: students in the College of Business, faculty and staff in the College of Business, and researchers in other academic disciplines. These different audiences have unique needs and communication styles, so the services the librarian presents and the way in which the librarian communicates these services will differ between the groups. The idea of Pitch Switch is that the librarians create pitches unique to their different target groups rather than using one standardized pitch. In order to most effectively communicate their value in under a minute, it is essential that the librarian identifies which services will be most useful for each target group and only focuses on those. The means of communication will also differ between the three target groups. Engaging students may take a more informal and fun approach while engaging faculty may have a more formal tone. Engaging non-business disciplines will take creativity and different vocabulary to describe business research and why it may be useful to non-business academic disciplines.

Delivering these pitches can take many different forms. The pitch can be given during a meeting with faculty or during a student orientation. The author's idea was to make pitch videos that could be disseminated online to her different target groups. There are a variety of online tools that can be used to create pitch videos. These range from screencast software where the librarian can provide narration over a shared screen to animation software where the librarian

can create a video using animated characters. A free screencast software that can be used is Screencast-o-matic. The screencast software used by the RAI department is Camtasia. Two popular cloud-based animation software are Powtoon and MySimpleShow. Powtoon can be used to create animated videos in color using a number of professional templates. MySimpleShow can be used to create black and white animated videos. It is important to understand the different online tools available to assess what method will be best to engage each target group. The author decided to use Powtoon to create her pitch video for students. Creating the pitch video in Powtoon allowed the Business Librarian to introduce herself and her services to students in a fun and engaging way. The animation gave the video a more informal and lighthearted tone. In the video the Business Librarian introduced herself, listed types of research students may be doing (as seen in Figure 3), and highlighted the different ways students could meet with the librarian and contact her.

While the author made the pitch video for students, there were several edits that needed to be made before the video could be published and shared. The pitch video was made with a music track and no narration. This presents issues for accessibility and ADA-compliance. The video is also longer than one minute which is not a best practice for pitches. In her first year, the author decided to focus on other virtual outreach methods. She plans to update the student pitch video and disseminate it at the beginning of the Fall 2021 semester. Her plan is to send the pitch video to student orientation organizers, academic advisors, and faculty in the College of Business. She also hopes the video will be shared on both the library and the College of Business's social media pages.



Figure 3 SCREENSHOT OF PITCH SWITCH VIDEO FOR STUDENTS.

Outcomes and Reflections

Online teaching and learning is here to stay. As students, faculty, and staff continue to meet in the online environment, it is imperative to rework the traditional idea of networking. In a presentation at the BRASS Fall 2020 Online Symposium, the author polled the 75 people in attendance to ask how the attendees were reaching students and networking with faculty in the online environment. The most popular answer by an overwhelming majority was e-mail. This helps demonstrate the library profession's lack of resources and tools for virtual outreach. The online environment necessitates innovation. Universities and libraries have demonstrated incredible innovation and resilience in

responding to the COVID-19 pandemic. As vaccines become widespread and universities plan to return to in-person instruction in Fall 2021, it is imperative that libraries decide which changes and innovations to carry with them into the future. Networking and relationship building in the virtual environment will remain necessary.

Some libraries, like Tampa General Hospital's Medical Library, saw an estimated 220% increase in their post-meet and greet survey responses in the digital environment of 2020 compared to the paper and email responses of previous years (Costek & Novak, 2020, p. 372). This clear and significant increase in engagement proved to Costek and Novak that their digital adaptations as part of the library's COVID-19 response were successful and will continue.

Unlike Tampa General Hospital's Medical Library, the University of Louisville's Research Assistance and Instruction department did not see an increase in engagement because of the virtual outreach methods utilized by the Business

Librarian. However, this does not necessarily mean the virtual outreach methods were not successful. While the library profession has assessment methods for different components of librarianship, there is no defined methodology for assessing outreach. German and LeMire (2018) argue that it is important to assess outreach “in order to measure the success of the outreach activity, identify areas for iterative improvement, and demonstrate the value of the outreach activity to stakeholders”; however, “connecting assessment to outreach in an intentional and goal-oriented manner has yet to emerge as a common practice” in libraries (p. 66). German and LeMire (2018) advocate a multi-faceted approach to outreach assessment that requires “consciously considering an outreach event’s purpose, goals, and outcomes” and developing predetermined assessment strategies that will be able to reflect whether or not those goals were met (p. 68). While this will be an important methodology to utilize moving forward, it is possible to retrospectively consider the goals of the virtual outreach methods used by the author and whether or not these were met.

The author’s intention was to build relationships with faculty and students in her liaison subject area. The goal of building these relationships was to provide research assistance and instruction. In Spring 2021, the Business Librarian was asked to teach 20 instruction sessions. Between Fall 2020 and Spring 2021, the Business Librarian held 21 research appointments with students, answered 60 reference questions, and offered varying degrees of research support to 15 faculty members. While it is hard to directly correlate these numbers to specific virtual outreach methods, the overall goal of the virtual outreach has been met. The Business Librarian was able to provide research assistance and instruction in her first year at the University of Louisville, during the COVID-19 pandemic despite not having any opportunities for in-person engagement.

Moving forward, there are opportunities to expand upon the virtual outreach methods discussed. A new librarian’s outreach methods or focus may be different than an established

librarian. However, it is important to continue to build and manage relationships in liaison librarian subject areas beyond a librarian’s first year of service. Future research should test these outreach methods in different contexts and continue to build upon them. Another avenue for future research is to create better evaluation tools and methodologies for assessing outreach.

As Costek and Novak (2020) demonstrate, “Providing higher visibility and new forms of communication has helped to ensure that the library remains relevant... throughout this history-making pandemic” (p. 375). It is important that liaison librarians and university libraries continue to innovate new forms of communication and increase their visibility beyond the COVID-19 pandemic to ensure that libraries remain relevant in an increasingly technologically advanced and information-saturated world.

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