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## Best Practices to Refresh Your Research Guides

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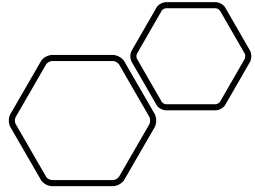
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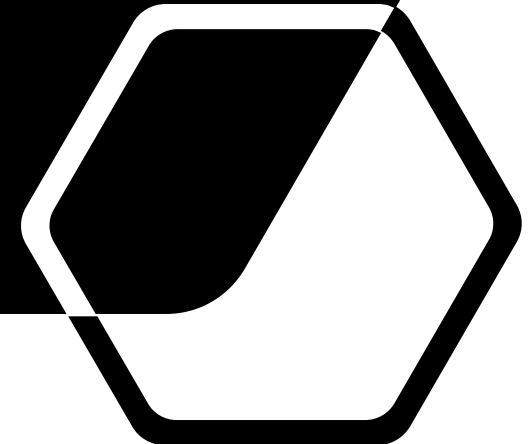
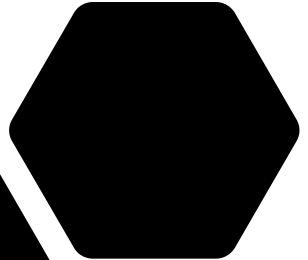
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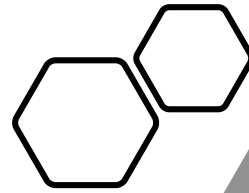
# Best Practices to Refresh your Research Guides

- Mandi Goodsett
- Marsha Miles
- Theresa Nawalaniec

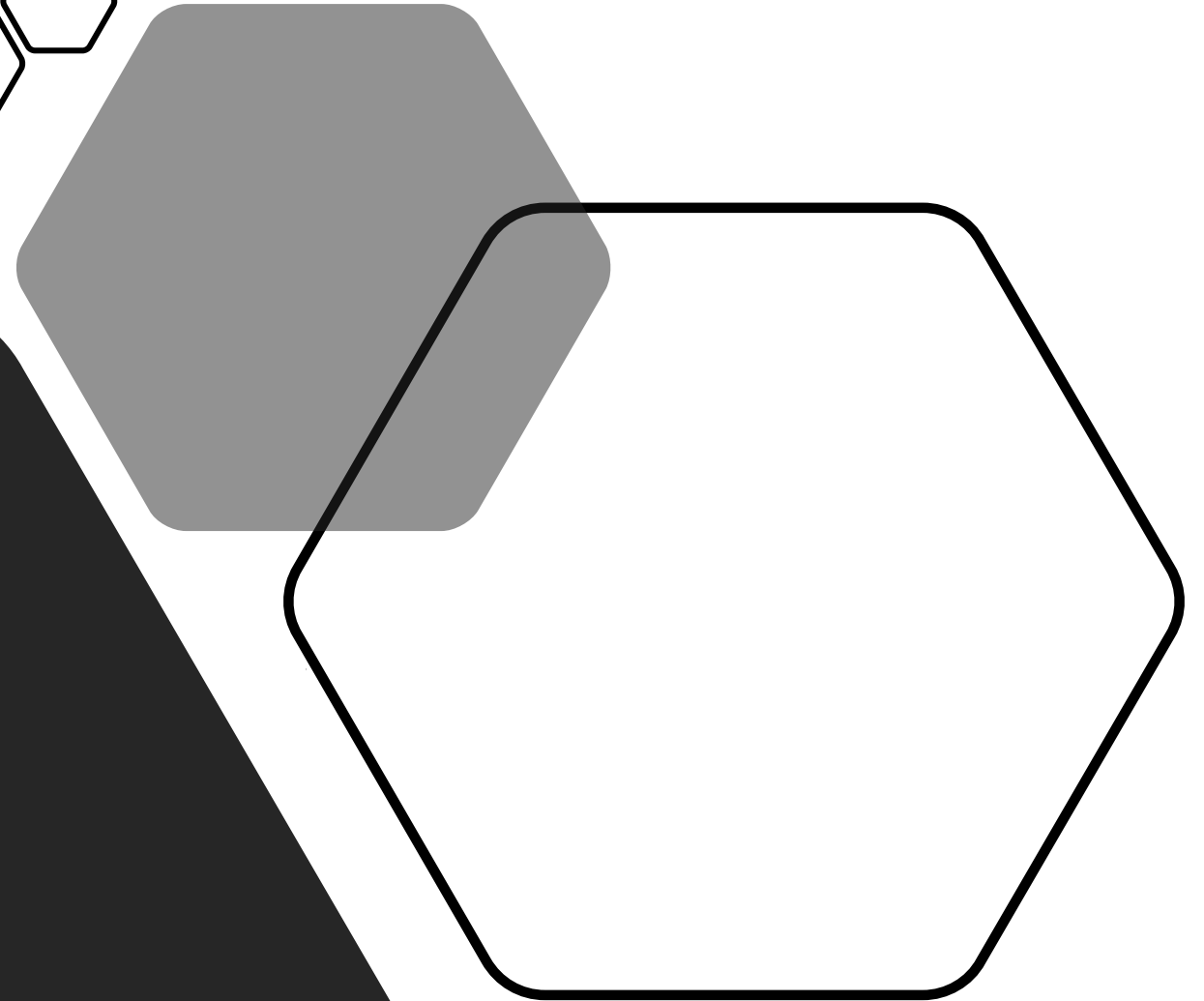
Cleveland State University



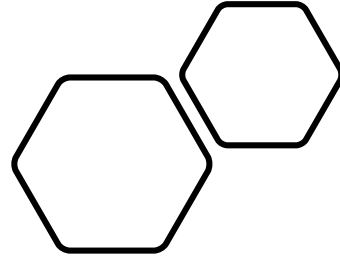
# Plan for Our Session Today



- Explanation of our research guides study
- Exploration of the best practices we discovered
- Some conclusions and resources
- Time to reflect with colleagues on research guide development at your own institution

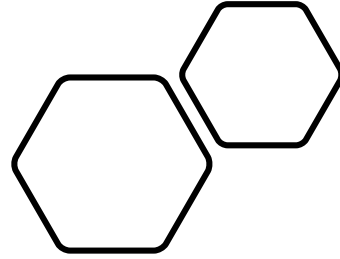


# Setting

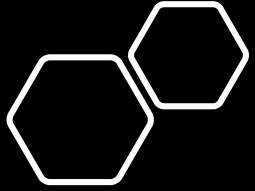


- Michael Schwartz Library at Cleveland State University, 2018
  - 7 subject librarians
  - 340 public guides on SpringShare platform
  - One administrator (web manager); little flexibility in terms of look & feel
  - Very few rules about how to design guides (extreme variety)

# Motivation for Research



- Ultimate goal: better **user experience**
- Desire for better **conformity** across guides
- Desire for **adherence to best practices** rather than individual habits
  - Interest in trying out the "side navigation" set up
- **Lack of enthusiasm** from staff regarding suggested changes
- **No central authority** (all librarians had complete freedom)



# Research Goals

## Use

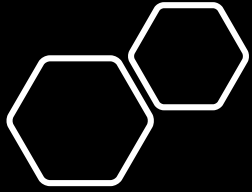
- Use evidence to establish best practices

## Consider

- Take time to consider best approach for sharing best practices with colleagues

## Demonstrate

- Demonstrate best practices and provide support for implementation



# Methodology

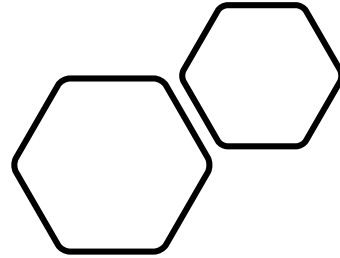
## PICO Process

- Problem or concern - usefulness/uniformity
- Intervention - apply best practices
- Comparison - updated vs. existing
- Outcome – improve user experience/consistency

## EBLIP – Evidence-Based Library and Information Practice

- Thorough literature review
  - Systematic search and critical appraisal of the most relevant evidence to improve outcomes and provide better service

# Methodology Continued

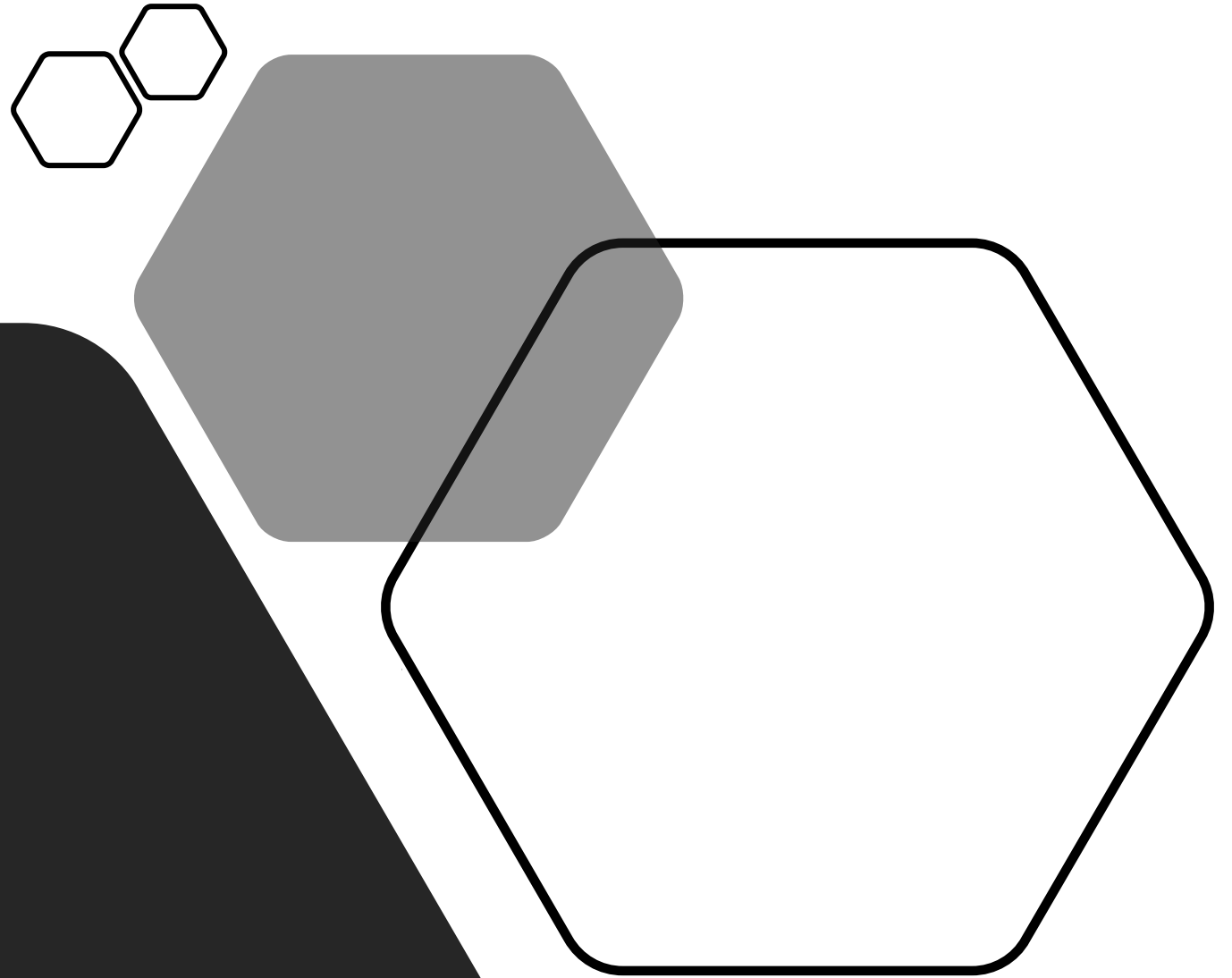


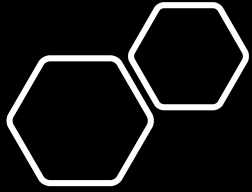
- Initial survey of students
- Literature review of usability/user design studies after using exclusion criteria
- Developed terms separately ---> Master List
- Applied terms to included literature (coding)
- Analysis and synthesis
- Created a master best practices document linked to literature
- Contradictions retained ---> more research needed
- Updated existing guide as demo



# Usability Design Best Practices for LibGuides

- Design / Layout / Organization
- Navigation
- Content
- Accessibility
- Purpose
- External Factors





# Design / Layout / Organization

## Template

- Provide a guide template for all librarians.
- A template is only so useful - guides should be customized to their unique audiences in some cases, and authors should retain freedom over guide content and design.

## Policy

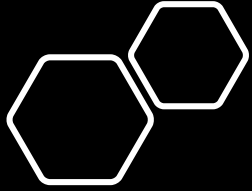
- Create standards based on best practices or other criteria.

## Uniformity / Consistency

- Use a unified, consistent format and design (fonts, background, color scheme) for subject guides and their content.
- Make sure labels and language are consistent across guides.
- Consistently name a core set of tabs by subject or format.

## Key Resources / Best Bets Box

- Provide a “key resources” or “best bets” box in a prominent location on the guide.
- Use a large enough text size (larger than default for LibGuides 1.0).



# Design / Layout / Organization Continued

## Hierarchy

- List resources strategically or by importance, rather than alphabetically.
- Sequence content in the order students would likely need to encounter it to accomplish their tasks.
- Put the most important content on the left and/or top of the page in an F-pattern

## Integration

- Use the main library or university website “frame” to visually integrate the guide with the rest of the website.

## Personal Presence

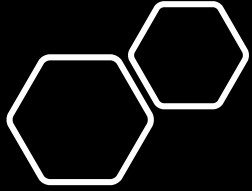
- Include a professional photo of one or more librarians on the guide.
- Make guides more personal by providing librarian contact information and option to chat.

## Chunking

- Split up content into meaningful chunks.

## Number of Columns

- Use a two column layout.
- [Use a three column layout.]
- Don't include important content in right column (students ignore this as it is commonly ad space on websites).



# Navigation

## Top vs. Side Navigation

- Use side/left navigation to make menu more visible.

## Tabs

- Tabs tend to be unnoticed and large numbers of them confuse students & cause clutter, so use only most relevant ones, usually all in a single row.

## Search Box

- [Don't include a LibGuides search box on guides, as students often treat it as a discovery or Google search. If a search box is included, include a description of what can be searched.]
- Include a search box as students prefer to be able to search the guide for content rather than browse/read.
- Provide embedded search boxes for research tools (i.e. databases, catalog, etc.).

## Table of Contents Box

- Do not provide a box on the guide that outlines its contents, while also providing tabs, as it is considered redundant by users.
- [Provide a table of contents box on the homepage of each guide because students often overlook tabs and/or to prevent students from having to scroll down.]

# Content

## Jargon

- Avoid the use of jargon throughout the guide or, if it's necessary, provide clear explanations of unfamiliar language.

## Labeling

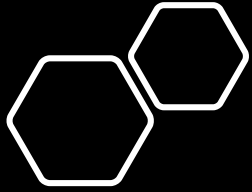
- Use short, clear, meaningful titles for guide names, boxes, menus, pages, and tabs.
- If possible, include a description (annotations) for tools provided in the guide, especially if their titles are not self-explanatory or use jargon.
- Name guides, tabs, and boxes the way students would search for them.

## Writing for the Web

- Write content using best practices for web writing.
- Use bullet points and bolded or varied text sizes to make pages easier to read.

## Content Maintenance

- Regularly check for broken links, perhaps with link check tool.
- Make sure videos and screenshots are up-to-date.
- Make sure terminology and content is current.
- Develop a maintenance plan for guides.
- Use the LibGuides asset manager to efficiently update links and reuse content across all guides.



# Content Continued

## Friendly Tone

- Use a conversational tone in the text of guides.

## Audio/Visual Material

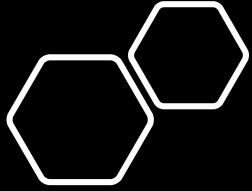
- Incorporate interactive and visual content to engage students.
- Use images sparingly, as they often add more clutter and waste space.

## Widgets

- Include a chat widget allowing students to chat with the subject librarian when s/he is online.

## Less Text / Content

- Ensure amount of information on pages and in boxes is appropriate.
- Include less content/fewer pages to avoid cognitive overload and encourage more usage.
- Avoid long lists; if lists are used, create them such that users can skip to sections/content of interest.



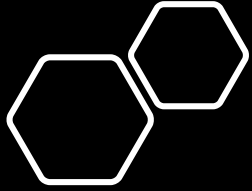
# Accessibility

Ensure guide can be easily read by a screen reader.

Ensure all videos on guides are captioned.

Ensure all images have alt tags.

All “click here” links should instead have descriptive text for the link location.



# Purpose

## Instruction vs. Reference

- Consider the purpose of the guide (to teach or to provide curated resource lists) when designing the guide.
- Provide instructional content in the guide that will help students complete the tasks that likely brought them there.
- Build the guide around one or more student learning outcomes or other pedagogical goals.
- Create course specific guides rather than broad subject guides.

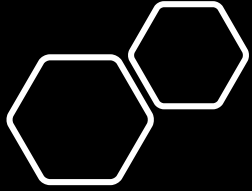
## Considering Audience

- Think about how students will search for content in the guide, and in accessing the guide. Let that govern your design.
- Purpose of the guide should be made explicit to students.

## Connect to Class / Assignment

- Tie the content of guides to specific course research and assignments.





# External Factors

## Guides Menu

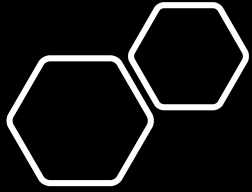
- Organize guides by how students would likely require access to meet an information need.

## Promotion & Marketing

- Librarians and, especially, instructors should promote guides.
- Link to guides in the learning management system.
- Email a link to the guide to students, provide the link in an in-class handout, or demonstrate how to access the guide in class.

## Guide Access / Discovery

- Provide a link to guides on the library's homepage.
- Provide links to guides in the learning management system.
- Consider ways of improving findability of guide in an organic search.



# External Factors Continued

## Reduce Duplication / Stale Guides

- Remove unused or stale guides.

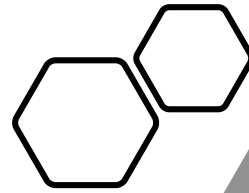
## Guide Assessment / Maintenance

- Use guide usage data to regularly assess guides.
- Use usability testing (focus groups, surveys, etc) and outreach to regularly assess guides. (not library staff)
- Guide authors should review guides regularly.

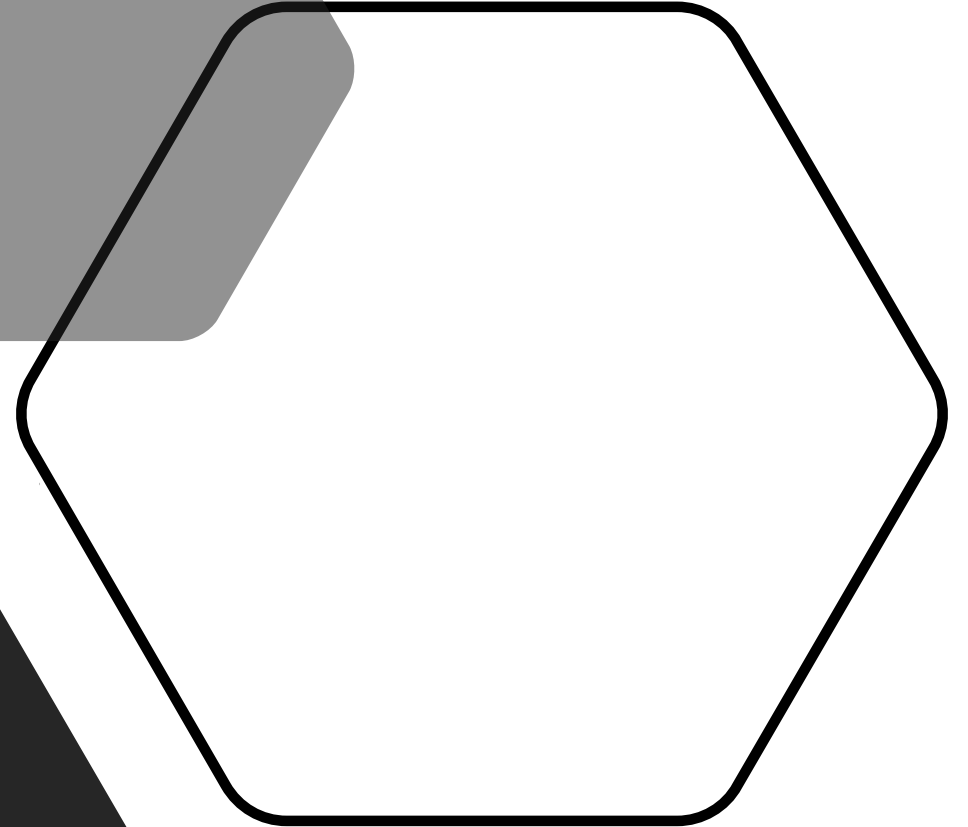
## Guides Team / Administrator

- Assemble an administrative team to maintain upkeep of guides and set guide standards for the institution.

# Research Conclusions



- Librarians spend a lot of time making guides, and they seem to make them for each other. Yet students don't use them as much as we hope.
  - Need for a focus on usability that meets **student expectations**.
- Need for **heavy promotion and collaboration** with faculty
- **More research** is needed, and some evidence conflicted
- We welcome questions & comments!



## RESEARCH GUIDES REFRESH CHECKLIST

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### 1. TABS

- Try to keep the number under 5 or 6.
- Make titles descriptive of the actual actions students want to take.
- Avoid jargon in tab and box titles if you can.
- Keep titles of tabs short (at least short enough not to go onto another line).

### 2. TEXT

- Keep textual content at a minimum!
- Chunk up content (multiple boxes, bullets, headers, etc.) as much as possible.
- Avoid jargon and write out acronyms.
- Make sure content is up-to-date.
- Use a friendly, less-formal tone.
- Use images within text sparingly, as it pushes text down the page and takes longer to load.

### 3. ACCESSIBILITY

- Ensure that PDFs are accessible.
- Ensure all videos on guide are captioned.
- Ensure all images on guide have alt tags.
- All links should have descriptive text for link location (not "click here").
- Avoid relying solely on color for meaning.

### 4. EXTERNAL FACTORS

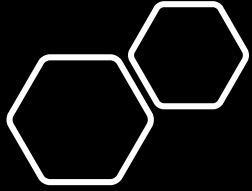
- Promote the guide as much as possible (show it in class, email it to the students, ask the professor to talk about it and include it on the syllabus).
- Remove unused or stale guides.
- Use usability data to assess the usefulness of the guide.
- Regularly check on the guide to update and/or unublish if no longer being used.

Best Practices: [researchguides.csuohio.edu/bestpractices](https://researchguides.csuohio.edu/bestpractices)

Template: [researchguides.csuohio.edu/template2019](https://researchguides.csuohio.edu/template2019)

# Implementation at CSU

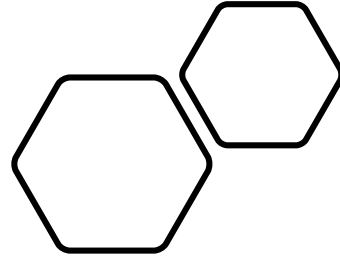
- Research Guide Refresh
  - During the summer
  - Invited all guide creators
  - Provided snacks
  - Included quiet work-time
  - Scheduled another work session



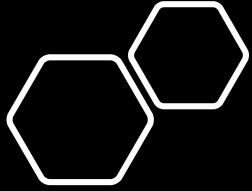
## Recommendations

- Consider timing of the switch
- Consider scheduling regular review/discussion after implementing (or in general)
- Does one person have authority for this in your library?
- Prioritize best practice(s) that are important to you and just start with that (more can be done later)
- Create new guides following the best practices
- Work with web team or person / Springshare administrator to ensure accessibility best practices

# Resources



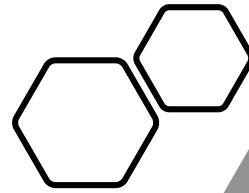
- Best Practices Research Guide - <https://researchguides.csuohio.edu/bestpractices>
- Research Guides Refresh Checklist - <https://tinyurl.com/2fhezuvp>
- Guide Template - <https://researchguides.csuohio.edu/template2019>
- Our article: *Reimagining Research Guidance: Using a Comprehensive Literature Review to Establish Best Practices for Developing LibGuides* - [https://engagedscholarship.csuohio.edu/msl\\_facpub/167/](https://engagedscholarship.csuohio.edu/msl_facpub/167/)



# Some Quick Demos

- [Switching to side navigation](#)
  - [Changing tab titles](#)
  - [Ensure images have alt text](#)
- 
- What else would you change about my example?

# Any Questions at This Point?



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## **Marsha Miles**

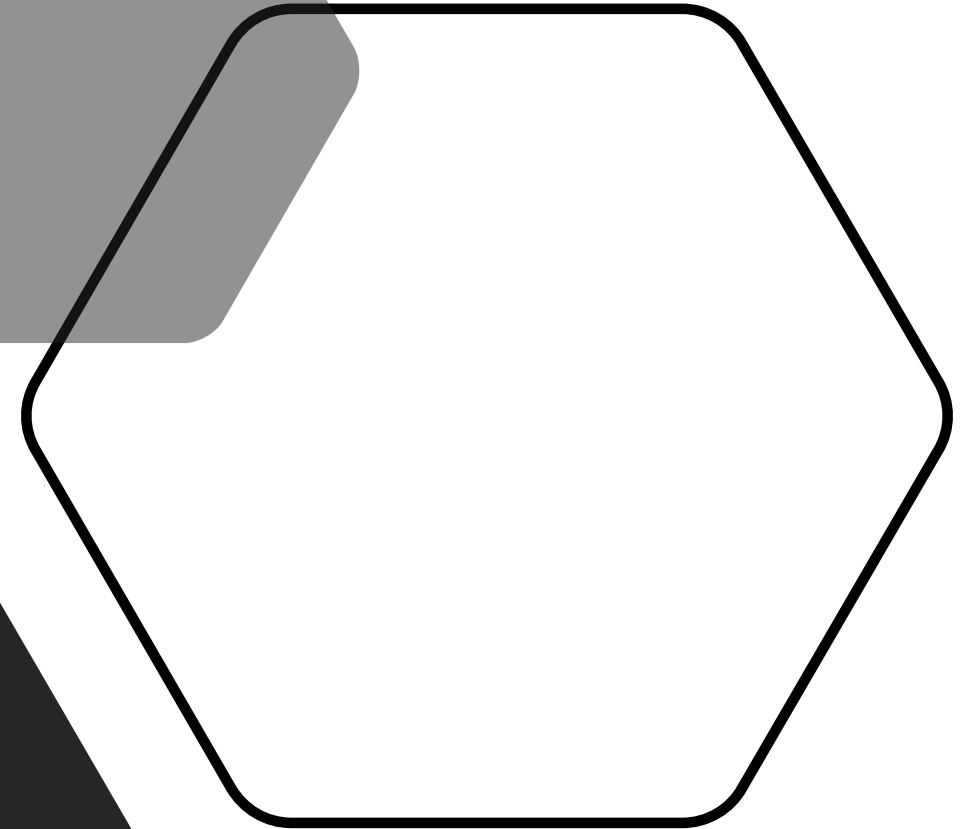
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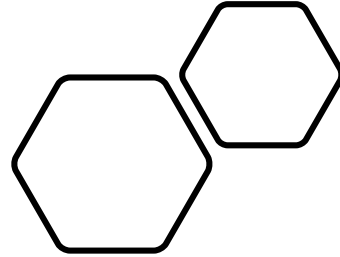
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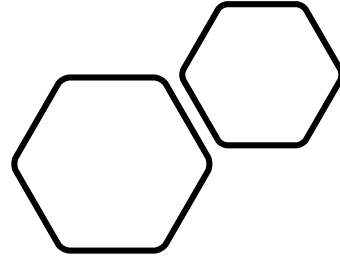


# Option 1: Discussion



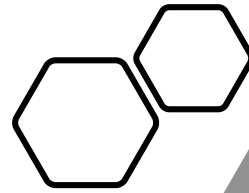
- What elements of best practices warrant further discussion?
  - I.e. What is the purpose of the guide? Who is the ultimate audience?
- How do you maintain guides and keep them up-to-date?
- Is it better to have enforced standards for research guides in a library or to allow librarians to have freedom in how they design guides?
- Do you conduct usability testing to ensure your guides are as useful as possible to patrons?
- How can guide usage be increased through marketing and promotion?

# Option 2: Activity



- One volunteer shares a guide with their group
  - Choose one area of best practices to focus on
  - Ask volunteer to consider the challenges for their guide in each category
  - Group members are welcome to share (in a friendly way!) what they would consider changing, what's confusing, and/or questions they have
  - Group reports out on the discussion

# Additional Questions?



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