

Connect, Guide, Motivate: A Model for Conducting Research Consultations Online

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Background

Individual research consultations have long been a core reference service provided by health sciences librarians; they have been demonstrated to improve students' technical skills as well as their confidence levels.¹

Prior to March 2020, the majority of such consultations at my institution took place in person. The University of Illinois Chicago (UIC) University Library works with over 34,000 students and 2,900 faculty over four locations, in addition to the UIC School of Law Library; I am one of 12 health sciences liaison librarians on a Library faculty of 53 FTE equivalent librarians.² In my time as a health sciences librarian at UIC, I have conducted hundreds of research consultations with students, faculty, and other researchers. Before the COVID-19 pandemic, fewer than 10% of these consultations were held online using videoconferencing software. However, when library services moved online with the pandemic, research consultation appointments likewise shifted to a virtual format. Between March 2020, when the library first shut its doors, and the writing of this chapter in September 2021, I held over 130 research consultations, all conducted remotely using WebEx or Zoom. As a group, UIC librarians held 75 online consultations between March 16, 2019 and March 15, 2020. In the twelve months that followed that number jumped nearly ten-fold, to 667.

The ability to hold meetings using videoconferencing technology is undoubtedly a good thing and offers many advantages to library users. However, while online research consultations are

similar to face-to-face consultations in many ways, there remain significant differences in the formats that influence communication and, consequently, student learning.³ Collaborators working via videoconferencing are more likely to misunderstand one another when compared with those working face-to-face.⁴ Myriad factors, from slow internet connection to lack of eye contact, can influence interpersonal communication. Poor digital literacy, often found alongside computer anxiety, likewise impacts the librarian's ability to form a connection with a student.⁵ So-called "Zoom fatigue," a newly documented phenomenon, may cause both librarian and student to feel anxiety or even dread when faced with yet another virtual appointment.⁶

The combination of these many factors led me to reflect on my approach to research consultations held remotely using videoconferencing. While there is a substantial body of literature on research consultations, library services for distance students, and online instruction in general, there does not yet exist a set of guidelines or best practices for conducting individual research consultations online using videoconferencing software.⁷

This chapter will discuss the unique challenges posed by online research consultations and propose a model for conducting individual research consultations online. By centering empathy and connection and employing a dynamic, individualized, relational approach to the model, the librarian can increase student knowledge, engagement, self-efficacy, and motivation through research consultations, despite the barriers posed by the remote environment.

Literature Review

Research Consultations

In a 2020 scoping review on individual research consultations in academic libraries, Stapleton, Carter, and Bredahl observed that an overwhelming majority of publications on consultations

report positive outcomes, resulting in improved research skills and increasing student confidence.⁸ Several authors have proposed guidelines for conducting consultations; by following established best practices, librarians do their best to ensure these outcomes. Sikora, Fournier, and Rebner found a significant increase in students' confidence after their consultation appointments with librarians; the authors emphasized the importance of tailoring each appointment to the student's needs rather than using a one-size-fits-all approach.⁹ Rogers and Carrier propose matching consultation requests to librarians' areas of expertise and/or interest.¹⁰ Magi and Mardeusz, in their study on how students and librarians perceive research consultations, make two recommendations for routine practices: "having students and librarians identify clear learning objectives at the outset of the consultation; and following up consultations by asking students about their level of satisfaction with the process and their success at applying newly developed library skills to additional projects."¹¹

Matook emphasizes that the major strength of research consultations is the ability to individualize content, allowing the librarian to address each student's specific needs. Matook further asserts that "the most meaningful interactions result from the librarian considering the user's perspective, building up their research confidence, engaging them as a research partner, communicating in a manner that resonates, and creating a lasting positive impression."¹² In this way, the individualized nature of the research consultation enhances the social component of the meeting beyond simple knowledge transfer, building the relationship between librarian and student.

Recently, several authors have applied a critical librarianship lens to the topic of research consultations, further enhancing our understanding of this library service. In an insightful essay, Symphony Bruce proposes a conceptual framework for providing care during research

consultations, arguing that the librarian-student relationship should be centered in the appointment, rather than centering the research topic itself. Drawing from Care Ethics, Relational-Cultural Theory, and Critical Race Theory, Bruce expertly posits that consultations are an opportunity to "build meaningful connections with students" and meet students' expressed needs.¹³ Forbes and Bowers discuss research consultation through the lens of sensipensante pedagogy, arguing that that librarians should consider "not only the intellectual needs of students, but also their social, emotional, and spiritual growth," as part of our work toward connecting with students and building critical communities.¹⁴ Arellano-Douglas similarly advocates for a model of reference centered around relationship building and informed by intersubjective mutuality, or "growth through empathy exchange."¹⁵ All of these authors have had a strong influence on the model proposed in this chapter and I encourage anyone interested in the topic to read them.

The through-line in all of these papers is that a successful research consultation must be (1) **tailored to the individual student**; and (2) **grounded in interpersonal connection and the relationship between librarian and student**. It is these two principles that guide the proposed model for research consultations in the remote learning / online environment.

[Videoconferencing in Distance Learning](#)

While videoconferencing technology has been available for decades, its user base grew exponentially during the COVID-19 pandemic to near ubiquity, in society at large as well as, particularly, in higher education.¹⁶ The use of videoconferencing technology such as Zoom is a way for educators to bridge physical distance and foster connection with students, provided that they devote ample attention and time to practicing the technology and incorporating pedagogical and intercultural best practices.¹⁷ Many educators, including librarians, likely felt they were

thrown into the deep end with the abrupt transition to remote learning in spring 2020. Our instruction sessions and research consultations moved online without adequate time to reflect on the transition or its implications for our practice. As videoconferencing has become an unconscious component of our work days, certain disadvantages and advantages to the technology have become apparent.

Disadvantages

Barriers Related to Inclusivity and Connection

On a fundamental level, varying levels of proficiency with technology create a practical barrier for students with poor digital literacy, particularly those returning to school after years in the workforce. Tasks such as screensharing, toggling between application windows, and downloading shared files are a cinch for some individuals but exceptionally challenging for others. On the other hand, some students may be comfortable with technology but lack the resources necessary to make remote learning equitable and accessible to them, including stable home internet connections, a computer of their own, or privacy for participating in classes and online meetings.

Many students are uncomfortable or unable to turn on their cameras, for a number of reasons.¹⁸

Educators practicing inclusive pedagogy may understand why it is not desirable to require that students turn on their webcams yet still find it challenging to form an emotional connection.

Even if both users have cameras turned on, eye contact is not possible if the user must choose between looking into the camera or into the eyes of their conversation partner.¹⁹ Furthermore, the camera shows only the user's head and shoulders, eliminating the body language that usually helps us interpret students' reactions to our work and determine if they are still following along with their instructors.²⁰

Zoom Fatigue

In addition to practical barriers occurring when our communication depends on technology, and when individuals are working from home with any number of distractions and conflicting needs, a significant barrier to successful communication has emerged that researchers call *Zoom fatigue*. A term coined to describe the "tiredness, anxiety, or worry resulting from overusing virtual videoconferencing platforms," Zoom fatigue is a relatively new phenomenon in higher education research, but has taken a more prominent role in recent work.²¹

Researchers posit that this fatigue is the result of multiple nonverbal factors, including mirror anxiety, a feeling of being physically trapped, hyper gaze, and increased cognitive load from both producing and interpreting nonverbal behaviors.²² Fauville and co-authors explored five nonverbal mechanisms of Zoom fatigue, finding that these nonverbal factors play a significant role in its presence. The researchers concluded that women are disproportionately affected by the phenomenon, and non-white participants in their study also reported higher levels of fatigue than white counterparts.

Advantages

Despite these disadvantages, conducting research consultations online has proven valuable in a few ways. In fact, online consultations offer several advantages over those held in person:

- Many students with high levels of library anxiety, especially undergraduates, find making an appointment to meet online an easier hurdle to clear than coming to meet with a librarian in person. It is a lower point of entry for students who may have high levels of discomfort making themselves vulnerable in these appointments.

- Scheduling, weather, transportation: these are all barriers to students coming to the library in person easily overcome by meeting online.
- The screensharing capabilities of videoconferencing software make it easy to encourage the student to take the lead in searching. The librarian can easily follow along on their own screen.
- As new variants of COVID-19 develop, vaccination remains well below herd immunity levels, and public health experts discuss not if, but when, our next pandemic will arrive, it seems prudent to avoid situations in which we must huddle over a computer shoulder-to-shoulder with a student. A librarian feeling the beginnings of a common cold no longer has to choose between cancelling a much-needed consultation and potentially infecting a student.

At my institution, as we passed the one-year mark of the pandemic and began discussing a return to “normal” (however that is defined), our conversation turned to which remote services we might retain in our practice even as we physically return to working in our library spaces. Many of us have come to view online research consultations not just as a makeshift option but as a viable and valuable part of the services that we offer. For this reason, it seems useful to develop a framework from which to approach online research consultations moving forward.

Proposed Model for Conducting Research Consultations Online

In Figure 1, I propose a model for conducting online research consultations with students, divided into three themes: Connect, Guide, and Motivate. For each theme I will provide a brief explanation of the components that will have a positive impact on your interaction with the student, as well as an example script of questions or remarks to share.

< insert Figure 1 about here >

Connect

Above all, interpersonal connection and relationship building are critical in a research consultation. When in person, this can be accomplished in myriad ways, many of which we may not even be aware of. Simply inhabiting a physical space together with another person, by bringing us physically closer, emotionally connects us. Making small talk during the tasks before beginning an in-person appointment—perhaps while unlocking a meeting room, walking together to a computer workstation, or waiting while a library computer boots up—builds relationship without conscious effort. In my experience, contrastingly, students and librarians alike join virtual meetings ready to go; small talk at the outset can feel forced and often our instinct is to jump right in to content, moving quickly through the material to be conveyed. As an alternative, librarians can use humor, empathy, and listening skills in the following ways to ensure that appropriate attention is paid to connection and relationship building in a virtual research consultation.

Empathy

Librarians must approach research consultations from an empathic perspective. Putting myself in a student's shoes has always been a reliable way to check that the reference services I deliver are user-centered. A student demonstrates vulnerability when approaching us for help; acknowledging this is the first step towards counterbalancing the unequal power dynamic between educator and student with empathy. In a study of distance learning instructional designers, Matthews and co-authors found that a critical factor in empathic practice is seeing the student as a whole individual, caring about them as a person, and paying attention to their personal circumstances which might affect their participation in learning activities.²³ While

Beuoy correctly points out the importance of boundaries to avoid becoming a student's de facto therapist or feeling responsible for their mental health, research consultations can and should incorporate empathy within these boundaries.²⁴

Empathy may actually be easier to practice and demonstrate in an online research consultation than in person. When meeting students in person at the library, our interactions take place in a familiar (to us) setting, devoid of context that might give us insight into someone's motivations or struggles. Conversely, Zooming in to my student's personal living space often gives me a better understanding of who they are as a person, as well as the myriad circumstances affecting and interacting with their performance as a student. Some of our students working from home during the pandemic wrangled toddlers or shushed roommates while learning to search for scholarly articles and community health data. In one memorable case, I discussed a systematic review search strategy with a PhD candidate while they simultaneously answered phone calls from a 9-5 job and oversaw an elementary-aged child's online learning. These many barriers and distractions were outside of my control; I could see that they were doing their best given the circumstances.

The goal in these cases becomes not to overcome the barriers, but rather, to meet the student where they are, practicing patience and prioritizing the student as a person over the transfer of knowledge. If there's an easily addressed issue that can be resolved by asking the student, for example, to turn up their microphone volume, this is a fair request. But we should not expect them to change their environments or reschedule for a time when they are free from distraction—a time that may not ever come to pass.

The silver lining to these students being pulled in several directions at once: it drives home for me that learning library skills is just one of the many things with which they are dealing at any

given moment. Making them feel comfortable, confident, and able to tackle the task at hand is more important than any single database searching skill or citation management tip. I often leave an hour-long appointment wishing we'd been able to cover more, but as long as the student feels they made some progress and are comfortable contacting me with further questions, the ultimate goals of the consultation have been met. Practicing empathy helps us meet the student with patience and understanding rather than placing the burden on them to manage our own expectations.

Here are a few things that would not be said by a librarian practicing empathy:

- “Let’s reschedule for a time when you have fewer distractions.”
- “Lack of planning on your part does not constitute an emergency on mine.”
- “If you only have 30 minutes we won’t be able to cover everything.”

Instead, try:

- “Don’t worry, we’ve all been there.” or “My cat hates it when I’m paying attention to someone else, too.”
- “We might not be able to get all of these resources in time for your deadline, but we’ll find you something that works.”
- “Let’s see what we can accomplish today, then we’ll take it from there.”

Humor

While some librarians might not consider it an essential component of their typical in-person reference interactions, humor is a tangible way to foster emotional connection between librarian and student when not in the same physical space. It has been shown that incorporating humor into library instruction sessions engages students, helps them to see their librarian as

approachable, creates a welcoming environment, and builds rapport between librarian and student.²⁵ In online learning settings, humor has been shown to motivate students and help bridge the gap in physical connection, “tak[ing] the distance out of distance education.”²⁶ While not all attempts at humor are successful, simply venturing a small joke or humorous observation will convey warmth, approachability, and authenticity. Again, this is another way to focus your energy on building a relationship with your student rather than simply focusing on the transfer of information.

For example: try a self-deprecating joke if the technology doesn’t go your way or you make an error while demonstrating a database search. “I really do work here, I promise!” is a go-to of mine when I click the wrong link, for example. Your goal is approachability, not a stand-up routine; don’t overthink it!

Listening

As is required in any successful reference interaction, listen to the student. Request that they send you their topic and what they’d like help with before the appointment, but also ask as many questions during the consultation as required to understand their needs. As Bruce explains, research consultations are “mostly...a time of listening.”²⁷ Some students may be reaching out because they have no idea where to start or what they need help with; they may simply sense that they are struggling and are looking for someone to help get them on the right track.

Lehnen insightfully describes the importance of listening in librarian-student relationship, explaining that

library services are not a one-way delivery mechanism but should grow out of a two-way, dialogic relationship in which the librarian learns as much about the patron as the patron

learns about the library. Librarians can be open about what they do and don't know about a student's field of study or degree program in order to invite students to articulate their own experiences and needs. Such a dialogue demonstrates rather than undermines librarians' professionalism and extends recognition to students as budding scholars with their own voices.²⁸

In the absence of nonverbal cues such as eye contact and body language, frequent verbal check-ins with the student are of the utmost importance. At the beginning of the appointment, ask the student: "How are you doing today? How is the semester going?" While some may be more open to chit chat than others, simply expressing our openness will help to establish an emotional connection and ground the consultation in relationship building.

Turn your camera on and look into your camera rather than at the student's face to demonstrate that you are listening. Do not require the student to turn their camera on—if you want to gently encourage this, put it in an email to the student in advance so that they are not put on the spot.

Frequent verbal check-ins may include:

- “Can you walk me through what you’re working on?”
- “What have you tried so far? Or are you just getting started?” (Making it clear that the latter is a totally acceptable response.)
- “Where are you getting stuck?”

Guide

As is often quoted in instructional settings, our goal in research consultations is to be the *guide on the side* rather than the *sage on the stage*. Two methods that facilitate this dynamic in the

online research consultation environment are 1) allowing the student to lead the meeting, and 2) individualizing the content to their expressed needs.

Follow Their Lead

Speaking personally, when conducting a research consultation in an online setting rather than in person, if I control the screen I am likely to slip into “presenter mode” and unintentionally fly through content as though I were delivering a lecture or database demonstration. This approach permits you to convey a tremendous amount of information in a short time but has little else to recommend it. The student may struggle to keep up with your pace or lose interest as you go off on a tangent irrelevant to the task at hand. While some students are comfortable asking you to slow down or change your approach, others (I would venture most) will not be.

Whenever possible, use the screen-sharing capabilities of your videoconferencing software to allow the student either to share their own screen or to take remote control of yours. Guide them through where to click, what terms to type, and so on. Make no mistake: guiding a student through a complicated database search can be tedious, especially when you are not in the same physical location. Of course it would be faster if you did it yourself—you’re an expert. However, following the student’s pace is the surest way to ensure that they are understanding the content; it also shows you roadblocks that you might not have anticipated otherwise as the student encounters them in real time.

Allowing the student to lead the search process, we are again reminded that the priority is not to transfer as much information as possible; rather, it is to empower the student.

Individualize Content

By encouraging the student to take the lead in the consultation, putting control into their hands, we are helping to foster their sense of relevance. Adult learners are strongly motivated by whether they see instruction as “relevant to personal values or instrumental to accomplishing desired goals” and “need to know why the instruction is important.”²⁹ In brief, students are more likely to view the consultation as successful if they believe it was relevant to their immediate needs.

Centering the student in the interaction means trusting that their expressed needs are in fact valid instead of imposing what we assume they need to know. We “must resist a deficit model of instruction which suggests that struggling students are to be fixed by their educators.”³⁰ Many librarians—knowingly or not—carry in our minds the belief that we are superior to students simply because we have information that they do not: the familiar trope of all-knowing librarian and know-nothing student. Undergraduate, graduate, and professional students are adults, active and independent participants in the scholarly process; they “prefer, and are capable of, self-directing their learning.”³¹ Of course you may provide any information you see fit—there may be helpful resources, techniques, or tools that the student doesn’t know to ask about—but the goal here is to prioritize their requests and offer information in the context of their expressed needs.

Some less experienced students, or even those with experience but taking a course or project outside their usual area, may not have concrete ideas of where to begin. For this reason, requesting their assignment description, research question, or any other information about what they’d like to go over in your meeting, is a best practice when scheduling the consultation with the student.

Language for individualizing content as you proceed through the consultation:

- “Where would you like to start?”
- “How do these results look to you? What would you like to see that you’re not seeing here?”
- “How does this match up to what you were hoping we'd accomplish today?”

Motivate

Motivating our students is key to improving their self-efficacy in research consultation appointments, and direct, individualized attention plays an important role in this process. We want our students to leave research consultations feeling motivated, confident, and capable. To that end, here are a few things to keep in mind during consultations.

Confidence

The individualized nature of the research consultation is key to nurturing confidence in students. Students’ confidence levels increase after meeting one-on-one with a librarian and personalized communications have been found to improve student confidence and motivation more successfully than generic communication.³² This is yet another reason why it is important to listen to the student before, during, and after the consultation. Pay careful attention to negative feedback—while some students are comfortable letting you know they aren't happy with the direction you're taking, many others are not. Negative feedback might look like silence on their part, or one-word answers. Taking frequent "temperature checks" in the form of asking questions and offering reassurances will help you to gauge the student's confidence and, if necessary, redirect or repeat content.

Questions to gauge student confidence, and bolstering language:

- Before or at the beginning of the consultation: "How are you feeling about tackling this?"

- During the consultation, if receiving negative feedback: "What's giving you pause?"
"Does this look like what you need? If not, please say so!"
- At the end of the consultation: "Is this a good stopping point?" "Do you feel like this is enough to get you started? You can always email me if something else comes up."

Self-efficacy

Self-efficacy, or a student's belief that they are capable of executing what is necessary to achieve their desired goals, has been explored extensively in education and library literature. Information literacy skills of the sort that are the focus of research consultations (information seeking, computer literacy, use and manipulation of information) are central to building self-efficacy, particularly among distance learners.³³ Older students might be more likely to feel uncomfortable using videoconferencing technology, negatively impacting their confidence and belief in their ability to locate and use information effectively while participating in distance education.

While the proposed model for conducting research consultations online emphasizes human connection and relationship building, we must at the same time prioritize students' self-efficacy as the ultimate goal. That is, we must simultaneously be approachable, welcoming, empathetic, AND encourage them to do it on their own. For some students this takes longer than others; some graduate and professional students in particular are highly motivated, self-directed learners. For others, we must do our best to help them see themselves as capable of the information skills necessary for successful lifelong learning. The previously discussed techniques of allowing the student to lead the session, listening rather than lecturing, and centering their expressed needs, empower students with independence and problem-solving skills which can be applied to future information needs.

Conclusion

Ever-present in the background of these three guiding principles of the online research consultation—connect, guide, motivate—is the process of building a relationship between librarian and student. Inherent to relationship building is the understanding that the librarian must be willing to make themselves vulnerable in front of the student. Positioning ourselves as the all-knowing expert reinforces unequal power dynamics between librarian and student and may exacerbate library anxiety. Allowing oneself to be vulnerable in front of a student builds trust; furthermore, projecting a warm and approachable demeanor reduces anxiety for the student.

Future directions

As of the Fall 2021 semester, UIC librarians have returned to working in person at the library at least 60% of the time. The university is following a hybrid model with many students attending class in person. The main request form on the library's website remains limited to online appointments for research consultations, making this the default option, though our librarians may choose individually to offer in-person meetings at their discretion. In the first six weeks of the semester, of the 119 consultations held by UIC librarians, 88 of these were online and 31 in person. My twelve consultations in this period were all held online, which will continue to be my personal preference moving forward. I could not have imagined saying the same prior to the COVID-19 pandemic, but my experience has shown me that online research consultations can be just as successful as those held in person.

Holding one-on-one research consultations online takes a lot of time and energy on our part. Tailoring these appointments to students' individual needs, using multiple modalities in an effort to form an emotional connection despite geographic distance—these are challenging tasks which require us to be present, vulnerable, and flexible. But ultimately, it is worth it. This type of work

is among the most rewarding that we do as reference librarians and deserves a permanent place in the portfolio of services that we offer.

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