



Evidence Summary

Reference Management Practices of Postgraduate Students and Academic Researchers are Highly Individualized

A Review of:

Melles, A., & Unsworth, K. (2015). Examining the reference management practices of humanities and social science postgraduate students and academics. *Australian Academic & Research Libraries*, 46(4), 250-276. <http://dx.doi.org/10.1080/00048623.2015.1104790>

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Abstract

Objective – To understand patterns in reference management practices of postgraduate students and faculty members at one institution.

Design – Mixed methods online survey and semi-structured interviews.

Setting – Public research university in Australia.

Subjects – The survey included responses from 81 postgraduate students. Semi-structured interviews were conducted with 8 postgraduate students and 13 faculty members.

Methods – The researchers distributed an 18-item survey via email to approximately 800 people who previously registered for EndNote training sessions. Survey participants were also recruited via a website advertisement. The researchers recruited postgraduate student interview participants from the list of survey respondents. Librarians invited faculty members to participate in the semi-structured interviews. Interview audio recordings were transcribed and coded for data analysis.

Main Results – The survey found that 71.4% (n=55) of respondents used reference management software (RMS) and 29% (n=22) did not. Over half of the students who did not use an RMS described other ad hoc or “manual” (p. 255) methods for organizing and

tracking references. The majority of participants reported using EndNote (67.53%, n=52), while few respondents reported using other RMS tools like Zotero (1.3%, n=1) or Mendeley (1.3%, n = 1). Software awareness (49.32%, n=36), recommendations from faculty members (30.14%, n=22), and University support (47.95%, n=35) were the primary motivations for choosing a specific RMS. Other important factors included ease of use (32.88%, n=24) and integration with Microsoft Word (46.58%, n=34). Students preferred RMS features that support the process of accessing and using references in a paper, and reported that technical problems were the most common frustrations. The researchers found that student interview respondents were more likely to use RMS (75%, n=6) than were faculty member respondents (31%, n=4). Interview respondents varied in which RMS features they used, like importing references, PDF management, or "Cite While You Write" plugins (p. 258). Few interviewees used the RMS's full functionality, either due to variations in workflow preferences or lack of awareness. Similar to survey respondents, interviewees who did not use an RMS reported their own personal practices for managing references. The time and learning curve necessary to become proficient with a particular RMS, as well as how the RMS fit into a particular task or workflow, influenced respondents' decisions about software selection and use. Faculty members were split with their advice to students about using an RMS, with some respondents advocating that an RMS can save time and trouble later in their writing processes, while others took a more cautious or hands-off approach.

Conclusion – The authors conclude that measuring RMS use or non-use does not reflect the real world complexity behind student and faculty member reference management practices. They suggest that librarians may want to rethink focusing on RMS as the sole reference management solution. Librarians should also recognize that institutional availability and support may influence users' RMS choices. A user-centred approach would account for RMS and non-RMS users alike, and librarians should "develop a more flexible

perspective of reference management as part of an approach to researchers that aims to understand their practices rather than normatively prescribe solutions" (Melles & Unsworth, 2015, p. 265). Instruction workshops should help students and faculty members select features or systems that match their existing research processes, rather than exclusively demonstrate the mechanics of a particular RMS.

Commentary

From information literacy instruction and research management (Childress, 2011) to a larger suite of "researcher services" (Shanks & Arlitsch, 2016), academic librarians see reference management as a contemporary service to students, faculty, and staff. The current article encourages librarians to understand whether and how their existing approach to reference management responds to their user populations' needs. Pivoting the focus from specific software usage to the larger scope of a researcher's work situates reference management as an essential component of the scholarly research lifecycle.

Reviewing the article with Glynn's (2006) critical appraisal checklist suggests strengths in study design. Mixed methods design allows for a multidimensional understanding of reference management practices. Including the study instruments means librarians can complete a similar study of their local population. The article's user-centred orientation also aligns with user-focused trends in the library literature. While the study's findings about the personal, idiosyncratic nature of reference management are valuable, it is unclear how participants, pulled largely from a pool of individuals already interested in an RMS workshop, reflect the wider university population among study variables. The methodology does not illustrate how many participants were recruited from the EndNote workshop email list versus recruited from the website posting, or how many possible respondents had access to the website during the recruitment timeframe. Survey participants are described as "postgraduate Arts students" without

clarifying which disciplines they come from. While the article mentions disciplinary affiliations for the interview participants, the sample size for each discipline is not included. In reporting the survey results, the per-question n-value is also unclear and can, without explanation, differ from the overall number of respondents. For example, the n-value drops from n=81 in Table 1 to n=55 in Table 2. It is unclear if discrepancies are due to survey attrition or survey design.

The study suggests that reference management practices are highly individualistic and personal, implying that a one-size-fits-all approach to workshops and system recommendations does not serve all users. As the authors note, "investigations should focus on what students and academics are trying to achieve, rather than how they do it" (p. 263). With this in mind, librarians should develop services that help match tools to a person's needs, rather than adapt a person's workflow to a particular tool. Librarians must also consider their timing in such interventions, given that once users select a reference management system they are unlikely to change their practice. Finally, libraries with tight budgets, who are weighing the cost of

providing RMS subscriptions, may be interested in the finding that University support for reference management software influences users' decisions when selecting from among RMS options.

References

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