



# Working with a Librarian on a Realist Review

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## The RAMESES II Project

Literature searching for realist reviews differs significantly in some aspects from literature searching for other types of reviews, such as meta-analytic reviews (Cochrane reviews are the best known example of this type) or scoping reviews. If you are fortunate enough to work in an academic setting, and/or have access to the searching expertise of librarians, forming a collaborative librarian-researcher team will strengthen your project.

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### How do you find a librarian?

Ideally, you want to find a librarian with expertise related to your research, recognizing that the search might need to expand into additional fields of study. It is useful if the librarian has some experience in working on teams in the role of “information specialist”, but this isn’t absolutely necessary. If you aren’t sure which librarian at your institution has the most closely related expertise, browse through your library’s website. Often the names of individual librarians will be posted beside a listing of each discipline’s key resources. Once you’ve identified a librarian with relevant expertise, book an appointment to discuss your project. Don’t be shy...librarians are very friendly!

### When and How?

In order for the partnership to be successful, it’s important to include the librarian as early in the project as possible. The ideal time would be after the team has identified the research question and at least one possible theory that might explain the mechanism(s) at work. Ensure that team members (including the librarian) have the same

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understanding of the research question at the outset, and throughout the theory refinement process. It’s common for members of the team to interpret the research question differently. Lack of clarity will make the librarian’s job more challenging. Clarity about the question and the evolving theory will help the librarian recommend additional sources to search, including grey literature sources. Working closely together will help the librarian support your team.

Early discussion of authorship will also promote a collaborative team. More and more librarians at academic universities have faculty status, and co-authorship of a peer-reviewed paper will be attractive.

As the project progresses, it’s important to ensure your team are using the same criteria to assess the quality of papers retrieved. If team members use different criteria, it could lead to mixed feedback to the librarian about the quality and relevance of the material and/or the search terms. While the librarian will not normally need to be present when the relevance of each document is assessed, he/she should be present at every meeting that discusses evolving program theory. A clear agenda that includes bringing the librarian up to date on the project, including any decisions likely to affect the refinement of search terms, will facilitate communication. The librarian can then adjust the search strategy accordingly.

As the team works through the project, it is imperative to document all decisions made in relation to program theory development. Decisions and reasoning for selection of databases or information resources, subject headings and keywords, dates covered by the search and other inclusion and exclusion criteria should be recorded at every meeting. This documentation will provide a journal of the team’s thought processes and rationales as they work towards refining the emerging theory. This information will prove useful when it comes time to write up the research. It also facilitates clarity within the team to justify decisions made throughout the project.

## What does the librarian need to know in order to best support you?

As well as your expected time frame for completing the project, it will be useful if you could provide your librarian with as many of the following as possible: key background documents on your topic; relevant articles that you are already aware of; authors that are known to be writing in the field; and what associations/organizations are likely to, or have published documents on your topic.

It is also essential to be candid about feedback on the databases searches performed by the librarian. If the majority of the articles missed the mark – tell the librarian – but also tell them why the information wasn't relevant. Work together to refine the search strategy until it reaches a good balance of specificity and comprehensiveness. The aim is to identify the most relevant information sources (realist reviews aim for theoretical saturation), without having to wade through an overwhelming number of irrelevant items.

“Work together to refine the search strategy...”

## Do you have a data management plan?

Data management is the latest buzz word in the world of research, and for good reason. Many funding agencies and ethics boards now require that research proposals include a data management plan. It will provide details

on how you plan to organize, structure, store, and care for data used in or generated by a research project. The team should talk about issues such as: who will store the data for the project? Who can access the data? Would it be desirable to make the data publically available? Who can edit the data? How will the data be kept secure? How will you ensure that there are backups for the data? Some funding agencies require that the data be stored on at least three separate devices, such as the network, a laptop, and an external hard drive. How long does the data have to be kept for? It is best if the data management plan is in place at the beginning of the project. Making it up as you go is less than ideal.

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## In short...

If we had to name one essential item for ensured success in working with a librarian, it would be fluid communication. Both librarian and researchers need to communicate frequently, meaningfully, and respectfully. Librarians have a lot to offer the realist review team. Excellent communication can make the difference between a successful review, and an aborted one.

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