Episode 36: Hannah Rempel

**KL:** Katie Linder

**HR:** Hannah Rempel

**KL:** You’re listening to Research in Action: episode thirty-six.

[intro music]

# Segment 1:

**KL:** Welcome to *Research in Action*, a weekly podcast where you can hear about topics and issues related to research in higher education from experts across a range of disciplines. I’m your host, Dr. Katie Linder, director of research at Oregon State University Ecampus.

On this episode, I’m joined by Hannah Gascho Rempel, a Science Librarian and the Coordinator for Graduate Student Success at Oregon State University Libraries and Press. At Oregon State, she has led the development of OSU Libraries’ services for graduate students and has been deeply involved in the libraries’ Teaching and Engagement Department’s transition to a more strategic focus on learner-centered instruction activities. Her research focuses on research behaviors and curiosity, the intersection of technology use and learning, and providing library services that help promote graduate student success.

Welcome to the podcast, Hannah.

**HR:** Hi, great to be here.

**KL:** So, Hannah, I had reached out to you, and I want to openly admit this to our podcast audience, because I think that there are many researchers who get to their later-in-life research and realize they need a citation management system. And there are the lucky of us who discover these things in undergrad or graduate school and build up a citation management system, and I was not one of those people. And so, when I came to Oregon State, I saw that OSU Libraries was offering a range of workshops on Zotero and Mendeley and EndNote, and I had reached out to you because I couldn’t attend any of those—I didn’t have the time, unfortunately—and asked for a one-on-one tutorial, and you graciously joined me for that. So, I thought this would make a great podcast episode, to talk a little bit about citation management, particularly because I know there are people who still have not jumped on that bandwagon. So, why don’t we start out first with: what is citation management, and what are some of the things that these systems can do for us?

**HR:** Sure. So, thinking very broadly, I think citation management is just a way to keep track of all the sources that people find in their research process. And so, people do that in Word documents, they have snippets of each of the citations—that’s one way. There’s obviously the file folder method. So it’s any system where you’re keeping track of the actual information about the source, so, the author, the title. But then it expands out to where you can also keep either the source itself (the journal article is kind of the most obvious thing, where you also have that there), or a picture of something if that’s the kind of work you do. But then even further out from there, it’s keeping the notes that you’ve taken about that thing together with it, and maybe also some organizational overlay [inaudible] how the sources you’ve collected connect together. So I think some people are just at the Word document stage, or maybe even if they use a citation management tool, just a “here’s a list of all the things I have” stage. But then it can kind of grow from there into creating connections between those things. And you do that in a file folder system or you can do that using an online tool. And so, the online tools are increasingly helpful because they make those connections more quickly.

**KL:** Yeah, and I think one of the things when I think about citation management system software—and I’ve been kind of jumping into this in the past month or two and really trying to think about how I want to use it—is I don’t want to recreate the Internet on my computer. I mean, you can go out and find these things, and I think that we all have a body of work within our research that we call on frequently and we know we’re going to use. But this piece you’ve talking about, about building relationships between things, seems really significant, and I’m wondering, what are the other important components of citation management or the benefits that can come out of citation management for people who might be thinking, “Well, I have all those things at my fingertips in terms of just doing a Google Citation search to find these articles.”

**HR:** I think it really is that adding your own thought process to it, creating a mental model overlay, and there’s a variety of components of that. So, grouping like things together, so whether that’s topics or projects or places that you want to explore more, but however you group things together, and then also the notes that you take about those, because if you do a Google Citation search, that doesn’t have anything that you’ve thought of about the source connected to it, so making sure that there’s that component of it. And for those who think about this in more of a plagiarism sort of way, when you’re thinking more at the undergrad level, why do you use a citation manager, some of it is always pushing—“Make sure that you’ve got the correct citation for plagiarism reasons.” Well, a lot of that is building up good note-taking abilities so that you’ve put in your own thoughts in conjunction with the work. So I think that’s what makes it more useful, is having that all in an electronically searchable format that you can quickly reveal for yourself.

**KL:** Mm-hmm. Well, and I think one of the things that I’ve really found as I’m building up my own database of citations—and one thing I kind of started with was just taking the citations of the work that I have that’s published, and making sure that those citations are there and that I can find them. I think many researchers, we don’t cite something one time and then set it aside, it’s frequently—depending on the pipeline of research you’ve built up, you cite things multiple times. So, I kind of started there, but one of the things that was kind of interesting to me when I was building up the citation management system was thinking about how to tag things, how to create my own organizational structure, and also what I consider to be the magical components [laughs] of the citation management software, in terms of helping you to very quickly build up reference guides or bibliographies for things that maybe are just at a literature review stage. So, why don’t we talk a little bit about some of these citation management software systems and what things are available in them, for people who might not be familiar. Because I think, depending on the one that you use (and we referenced a few of them earlier—I’ll make sure to link to those in the show notes), they do have some overlaps in terms of the tools and the kinds of things they’re allowing you to do. So, can you offer us a brief overview of that, Hannah?

**HR:** Yeah. So, moving beyond file folders—that has its own system—the electronic tools all have a very similar structure to them, and I think that’s in part because of capitalism—pushing things to evolve in a way that’s more user-friendly, and so they’ve taken on a lot of the same characteristics. So if you learn one tool—not that there isn’t any work in learning the others—but the overall structure of them is very simple and similar. They want you to be able to collect things into this repository where you can search across it, you can create folders. All of that is very similar, and then your output is (when you’re writing an article or whatever it is) to create this reference list or a bibliography. So, that workflow is all very similar across—the overall outcomes are very similar. Some of the differences arise, though, in how you take notes, or how you highlight. So, for example, in Mendeley, you can have your PDF embedded right there within the tool itself and do highlighting and little stick-it notes right on there, and it’s very seamless. So, for those who are big into highlighting, that’s very important, and Mendeley works really well with PDFs in that way. And EndNote has a lot of those same kinds of features. EndNote is a tool that’s been around—probably not the longest—but the longest of any of the recent ones, and so a lot of people have that tool, and it works well with particular databases. So, researchers who are used to using (for example) Web of Science all the time, it integrates very well there, and so the searching workflow makes sense for them in that context, the way PDFs are labeled within the system makes it easy to find them again. So there’s a lot of good workflow issues there if you use the same database over and over again. Zotero is very user-friendly in an iTunes Store kind of way, so it’s familiar to a lot of people because of other interfaces they use in other parts of their life, and it works really nicely with many databases. So when you’re at the pulling-in-sources level, regardless of whether it’s Web of Science or Google Scholar or just a regular website, it pulls in information that way. And it’s actually the one that works the best with just web-based information. So EndNote doesn’t really let you play with regular websites as much, so people who use government websites or if you’re doing a popular sort of study where you want to look at popular culture stuff, Zotero works really well with that. And it’s very flexible in how it lets you move things between folders and lets you tag things and duplicate things to match your needs. Some other tools that I don’t work with as much, but have heard from others and have just poked around with a little bit, have some interesting features. So, Sente is one of those, and it works to help you create a model map as part of what you do. So, for those who are very visual, that has a lot of appeal. It only works on Macs, and so that’s a part of why I haven’t played with it. The other tools are not operating system-dependent, and so we’ve chosen that the library’s not to go down the route of—only for people who have a certain kind of computer. That one has a lot of appeal for people who like that visual nature. It does that really nicely. So, on the very simple end, there’s something like EasyBib, and we don’t do a lot with the here either, because it is very one-off in nature. It’s not creating that library that you’ll re-use over time, but for those who just want a quick citation that’s correctly (hopefully) formatted, you can go that route. So, for the very simple on-off route, there’s some options too. But the other tools let you interact with your sources much more from tagging, highlighting, mind mapping kinds of things, and so there’s some reasons in there why you would choose that. And they each do take work to learn some more of those interacting things, and so that’s where if you’re going to choose a tool, you want to commit to which one gives you the most output that matches your style. So for me, for example, I’m not a mind-mappy kind of person. I can understand why that works for other people, but my brain—I’m just very outliney, I’m very linear, and so that mind map wouldn’t really work for me.

**KL:** Well, and I think that a lot of pieces about research tools and strategies is so personal about what are you trying to do, what works within your discipline. The other thing that I really have liked about these software systems is that they often connect to the cloud. They allow you to have—at least Zotero, which I’ve worked with—you can do group folders, so people can be connecting and adding things if you have co-author situations. It’s also something I’ve used. I have my graduate students help me to organize some of my files. So the functionality of these systems is really interesting in terms of thinking about how you can collaborate.

So, we’re going to take a brief break. When we come back, we’re going to talk a little bit more about some tips and tricks specifically with these citation management systems, both for new researchers and for experienced researchers. Back in a moment!

# Segment 2:

**KL:** So Hannah, I talk with a lot of researchers who have not started an official citation management system. They’re doing more of the informal file management that you talked about previously. And I find this really interesting, that there are so many people who are not taking advantage of these tools, which can help you to be really efficient in terms of adding citations to your work, creating these bibliographies at the end of your articles and books. So I want to talk a little bit about that. Why is it that people aren’t doing this? And the one thing that comes to mind for me is I remember back when RSS feeds first became a thing, and people were encouraging me to set up a feed reader, and I was hesitant because “oh, it’ll take so much time to aggregate everything, and I don’t want to learn a new tool,” and then of course when I started using a feed reader, it was a miracle in my life and was wonderful. And I actually find this to be a very similar circumstance, where I put it off for a long time, and then when I finally said, “It’s time, I need to get into this and figure out one of these tools,” and I evaluated which one I wanted based on personal needs and professional needs. And now I think it’s great. I love it, I love the idea of it and have really tried to incorporate it into my workflow. So I’m curious to know, as you’re working with researchers—and I know you work a lot with graduate students—is it that people don’t know that these tools exist? Is it that it’s a new technology? What are some of your thoughts on why people aren’t jumping on this?

**HR:** So I think it’s a combination of things. I think there is a certain level of not knowing they exist. That’s definitely an issue. But I think a lot of what it is is what you’re saying, it’s the return-on-investment piece, and there’s actually some research out there about that. It was focused on undergrads, but it appears like it’s going to take a lot of time to use one of these tools, and you’re already busy doing your writing and other types of research, and so having another thing feels like too much. But I think as a lot of researchers see their projects expanding, and they try it out or see somebody else try it out, it very quickly becomes clear that the amount of time that you invest in this will be returned. And so, just like you’re talking about with your RSS feed experience, once you try it out and see how the workflows work for you, that it is worth the time, particularly if you have multiple projects where you’ll be reusing sources, then it makes a ton of sense. I think the other thing, though, that I see is modeling. And so, if you’re in an environment where you see everyone around you using one of these tools, then you’ll think, “Well, obviously this is part of what people do. I have to do this in my work.” And so those folks, I see, they don’t even ask, “Why should I use this?” or “Is this going to be too much time?”, it’s just, “Okay, I need to learn how to use this. Help me use this.” So, different disciplinary environments, I think—and even smaller than that, you know, labs or whatever the smaller-level culture is—have different modeling. We used to think that was faculty adviser sort of people showing others how to use a tool and then it would be adapted, and I actually see much more of the reverse. I see graduate students showing their advisors these tools, and more seasoned researchers coming in and saying, “I saw this and now I realize I need to use it”—and so, modeling in the other direction. So, either to faculty or to peers who’ve seen what their fellow graduate students or post-docs or whoever in the lab are doing. So, having that modeling component is actually the strongest piece of it, because you see somebody else using it and either being excited about it or getting done with their references really quickly or whatever—

**KL:** —Yeah, experiencing the benefits of the software. One of the things that I think is kind of interesting is using a citation management system has also been really been part of moving toward a more paperless process as well—and I talk about this just a little bit in episode four when we talk about juggling multiple projects, and we’ll link to that also in the show notes—but I think that part of it, too, is we have all these paper files, and a lot of people still prefer to read (when they’re researching) paper. They want to print out the article and read it, but then where does that article go? And something I’ve mentioned previously in episode four is when I went through my files at one point, I saw that I had multiple copies of the same article that I’d marked up at different points in my research career. And this is one way to really take notes on that and say, “The last time I read this was 2008. Now I’m reading it again, and maybe with a different lens.” But it does enable you to kind of shift your strategy from being one that is more paper-based to one that’s more electronic, and that seems to me also to be a benefit of using these systems, as well. So, for new researchers who are thinking about these systems and maybe have not yet started a citation library, what are some things you think they need to consider as they’re choosing one and thinking ahead about what they might need in the future, but also just some practical tips and strategies about how to set it up and how to get started?

**HR:** So, I think as a new researcher, that’s the best time to start. You’ve in the luckiest place in your career to do it, because you don’t have all this baggage of paper files that you’re just wondering, “What will I do with them?” So, for new researchers, I think a lot of it is getting used to the workflow, and so at that point I don’t think that you need to stress over “oh, she said Sente does the mind map thing and this other one does the PDF, I don’t know what kind of person I am yet.” I think for new researchers, choosing any of these tools can be helpful, and just committing to learning it. I am kind of Zotero-centric, because that’s what I’ve used, and I have found over time that’s the easiest entry point for a lot of folks because of its simplicity, and so I do kind of recommend choosing a simple tool that you can learn the overall structure of how these tools work so that you’re not as burdened by some of the workflow curves that are in there. So, choosing something that’s simple—Zotero’s also free, EndNote is not free, so that’s a little bit of a barrier for some folks. Mendeley is kind of freemium, so there’s a free element to it, but Zotero’s free, so the pain there is small. And then you can translate what you’ve learned. But once you have chosen a tool, a lot of what I would recommend doing is thinking through how you like to organize things or what will be useful for you in organizing things. So, are you a topic-based organizer? Are you a project-based organizer? Do you like to think in terms of workflow, so is it helpful for you to have a folder full of things that you’ve read, is that meaningful for you, just to know where you’re at in having done things, or that you’ve used and decided not to incorporate into work but don’t want to discard. So, which elements are most meaningful for you. And I think for most people, topic makes a lot of sense, and so creating meaningful topics. But then, because this is an online tool, you can easily rename stuff, so you’re not locked in, and so I think some people get hung up in wanting to create the perfect system initially. And a coworker and I, Margaret Mellinger, who used to do our Mendeley workshops, we actually did some research with folks a couple years ago and did interviews with people, and we found that there were people who admitted that it was sort of a procrastination tool, like you were doing work, but not the actual work you were supposed to be doing, so they’d spend hours creating tags and folders and stuff, and they wouldn’t actually be reading [laughs] their papers or whatever they were supposed to be doing. So, not getting so hung up on that, but thinking though what is a meaningful naming structure for you, so you have this map, then, for yourself of where you’re going to head. So I think that is a lot of what new people can do as they get started. But then, just practicing it. So, in my everyday life, I probably have Zotero open several times a day, and whether I’m on Twitter or if I’m reading a news article related to higher ed or whatever might be meaningful for me, but I’m adding things into my Zotero folders, and not all of those things are things that I’m going to do research on or are researchable. But it’s a way of organizing my everyday life, and so it’s always there for me, and I know that this is how I’m keeping track of things.

**KL:** I think that’s such a good point. And the other thing, too, I should point out is that a lot of these cloud-based systems have tutorials online, and they’re really walking you through how to get started, what’s the capacity of these tools, and we can link to some of those in the show notes as well. For researchers who are more experienced, who have a backlog, who have maybe several publications—and I had mentioned my starting point was just, “Let’s look at the things I’ve published already and go into those citations and bibliographies and transition that into Zotero.” And that was a good starting point for me. And it was something that I could have my graduate students help me with, and that was important too, that I wasn’t just spending a black hole of my time [laughs]. And you’re right, it is very easily transitioned into a procrastination tool. But what are some other tips or strategies that you have for people who are well-experienced with their research?

**HR:** So, I think people who have either undergrads or grad students [laughs] to do the work for them, they very quickly see that as a good task for them to do, and I see a lot of people who do that. But I would say, if that’s either not your workflow or you want to be more hands-on with it, starting with just one project (so, whether that’s a new paper that you’re working on, or like you’re saying in your own example, a part paper that you worked on), and just pull in that discrete amount of information so you can see how this works overall. And maybe being okay with not feeling the need to pull in all of your past paper files—

**KL:** —Absolutely.

**HR:** —At a certain point, letting some of that go, but have it be sort of a move forward. I think another way to approach it is a lot of people might not actually have the paper system, but they have files just full of PDFs on their hard drives, that’s actually much more [laughs] of what I see. And most of these tools allow you to pull in PDFs from your desktop or wherever you stash them, and then they create the citation information automatically for you. And so, that shouldn’t be a barrier. That’s part of the workflow of what these tools can do, is they can help you organize things you already have but where it’s just a PDF. So, if you want to take a little bit of time to pull in those PDFs and organize them within Zotero or Mendeley or whatever, I think that works too, but I think starting with a particular project and then choosing to move forward instead of trying to capture all of the past stuff is probably the best way to go.

**KL:** I think that’s such an important point, too, because it does come down to, again, a very personal thing of asking yourself, how do you plan to use this tool. And we all have different pasts and histories with our research that we set aside and we leave behind, and we move in new directions, and it may not be relevant to put those things into this system, or just needed. It may not be something that you need to move forward with, so I think that’s just an excellent point.

We’re going to take another break, and we’ll be back in a moment.

# Segment 3:

**KL:** Hannah, the most that I use my citation management system, the more I have come to understand the range of uses for it than what my early understanding was, which is just, “This is an efficient tool to help me insert citations as I’m writing, and then the tool automatically then generates this bibliography at the end.” And one thing we didn’t mention earlier is that a lot of these tools integrate with your browser so that you can bring things in directly from online. They also usually integrate with Microsoft Word, so there’s a way to connect these things and to make things really efficient. But I’d like to spend a little bit of time in this segment just talking about some concrete examples of how you can use these citation management systems in ways that people maybe haven’t thought about more than the traditional way. So, what are some things that you’ve seen that people are using this for in their research and their work?

**HR:** Sure, so one is building off your Word example. There’s obviously using it to write an article or a thesis or whatever your major document is, but you can also create standalone bibliographies, and so that’s a very one-off task that is made very simple with a tool like Zotero or Mendeley or EndNote. So, if you need to put in something in your CV, you can very quickly generate this list of your articles or works that you’ve authored and just dump it into a document. Or, you can create a standalone bibliography that you can then annotate below it, and it can be sort of a thinking document for you. So, using Zotero with Word, but in some different ways. I think some other ways that I’ve seen people use Zotero that are kind of fun are to incorporate more images into the Zotero library, and so some of the examples I’ve seen are people who have an article that they’re interested in, but what they’re really interested in is a particular figure or table for that article, so they’ll take a snip of that figure or table and then attach that image below the citation so they have the chunk that they’re really interested in, because you can’t textually describe for yourself a figure as well as you can see something. And I’ve taken to using my phone or my tablet—I’ll take a picture of a book if I have an actual print book that I need to return to the library, and I’ll take a picture of a table and then include that picture in my Zotero library, so I have that information easily available. But there are also people who I’ve worked with, design and human experience people, who work with fabrics and dresses, and cataloguing actual images. That’s another thing you can do in these tools.

**KL:** Well, and I think one of the major components to think about as you’re setting up this system for yourself is making sure that you know how to search for what it is you’ve put in there. So, if you’re creating this catalog of stuff— some of it’s going to be articles, and you might remember an author’s name, or you might remember a topic or part of the title, but there are going to be other things—and I have taken to doing the same thing, just taking a table or taking one page of an example of something. I don’t need the entire article, I just need this one snippet. Or a handout I get at a conference. Rather than stick it in a file somewhere where I forget about it, I catalog it so that if I search for something related to that later, it’s going to pop up, and I’m going to remember it. But it’s about, too, knowing yourself and knowing the kinds of things that you’ll search for. And one of the things that at least the citation management system that I use is when it integrates things from something like Google Citation, it will bring its own tags with it sometimes. And those tags might not be the tags that I would create, so I always want to go in and make sure that I’m aligning my own management with what’s coming in. And also, really training my graduate students to have an understanding of the kinds of searches that I might do and why I’m using this system, which goes beyond just for research purposes. Like you said, it’s oftentimes about creating a one-off lit review when a faculty member comes to me and says, “Do you have any literature on blended learning in physics?” And I’ll say, “Let me do a quick search,” and then I can create a bibliography for that purpose alone. And I also love what you said about using it for your CV. I think that this is something people have such a hard time keeping up with their CVs, and creating a section on your citation management that’s just about your own work, that just makes so much sense to me.

**HR:** Definitely. Yeah, yeah. And I think one other thing I didn’t say, and this again relates to knowing yourself, is that there’s a specific field for notes in many of these tools, and so if you take meaningful notes, then you can search for something that you wrote in a note, and it will pull that back for you.

**KL:** Mm-hmm. Well, and the other thing, too, that we haven’t really mentioned is—and again, this was something I didn’t really understand about the functionality of these systems—is that when you do search, and you pull something in, maybe from the Internet or Google Scholar or something like that, a lot of these things that you pull in have their own metadata, and so you’re not necessarily hand-entering all of this data about a particular article. You might want to check it to make sure it’s correct, but that was a huge game-changer for me, was just literally not having to type out every single thing and being able to run searches. And this was something that I used—I was working with a couple of faculty, and we were kind of brainstorming about a potential edited collection that we were thinking of proposing, and we didn’t really feel like we had a full sense of the landscape of the literature that we were looking at—and so, I used a citation management system and some searching on Google Scholar to put together an 11-page bibliography of anything that was remotely tied to this. And it took so much less time than if I had been trying to type out all of these citations. And then I could easily share it, and this entire folder could get shared with the other two co-authors or co-editors I was thinking of working with. So, that efficiency and the ability to be able to plan—I mean, it’s not even just the work you’re currently doing, it’s thinking ahead to maybe doing a quick lit search to see what‘s even a gap that maybe you want to fill in your own work, and that to me seems like a huge piece of this, as well.

**HR:** Definitely.

**KL:** So maybe one more thing we should mention is this group functionality, which came up a little bit earlier but seems to have so much potential, particularly with collaboration and the kinds of research that many people are doing now. What are the ways that you’ve seen people using groups in these citation management systems to collaborate or to partner on different projects?

**HR:** Yeah, so my experience in this is definitely more Zotero-specific, and that’s in part because Zotero is the most open with the groups that you can create, and by that I mean that you can have a limitless number of people in a group without paying extra for it. EndNote cuts you off at a certain number of users, Mendeley makes you pay for more group members, so that’s where some of those differences come in. But then, within Zotero, there are a couple different kinds of groups, and so, one is “public to the whole world” kind of group, so if you’re doing this amazing research on e-learning that you want to share with everyone, you can make that openly available. And Mendeley is actually really good about that, too, in the way that you can publicly share an important work. But then, what I see much more of the time is a more local sharing, and so local like either physically local, or local in that you’re working on the same topic with somebody that’s specific to you. So, you and your grad students, that’s a very common thing that I see, is people in a lab working together and sharing a library, and they’re all adding to it, and they are all keeping track of what’s in there so that they can create a paper, book or whatever it is together. Another one is collaborators who are working at different institutions and want to create a group project together, and that comes back to choosing a tool. If all of your collaborators are using Mendeley, then you should probably use Mendeley. So, knowing what people use is helpful. There is some ability to export and import between those two, and that works, but when you’re working in groups, you kind of all have to be on the same page for that. But, there’s definitely a working-towards-a-common-goal kind of thing that I see most often, or building up this set of works that you know everybody in your lab is going to want to have access to.

**KL:** Well, I hope that this episode has given our listeners some ideas of what to think about if they’re just new starting out or if they’re experienced, or even if they’re already using these tools, and hearing about some of the different functionalities. Thank you so much, Hannah, for coming and joining me in sharing your expertise on this.

**HR:** Oh, you’re welcome. It was fun!

**KL:** And thanks so much for our listeners for joining us for this week’s episode of Research in Action. I’m Katie Linder, and we’ll be back next week with a new episode.

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