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Victims of Success: Managing the Consequences of Digital Outreach

Sean Benjamin

Tulane University, Louisiana Research Collection

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Sean Benjamin
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Abstract
For well over a decade, the archival profession has made increased discoverability via digitization and online finding aids one of its primary focuses. Like many other archival institutions, the Louisiana Research Collection at Tulane University has worked in recent years to increase accessibility by digitizing its archival holdings and converting legacy paper finding aids into an online format. As part of an undergraduate-focused university, we have worked to make our holdings central to our students' education through an extensive undergraduate archival instruction program. We have also raised our profile through a sustained social media outreach campaign.

All of these efforts have been successful in raising LaRC's profile among diverse researcher groups. We have seen a dramatic increase in reference traffic over the past several years, attributed in large part to the increased discoverability of our collections. Email requests have increased by 70% in recent years, while both phone requests and requests to publish have doubled. These successes, however, bring costs. In an era of austerity in which archival institutions find themselves fighting to preserve what funding they have, a dramatic increase in reference traffic strains the workload of already understaffed departments. As archivists, increasing access to our collections is a laudable goal which is rightly central to our profession. However, we must find a way to handle this reference influx responsibly without reducing services or neglecting other core archival responsibilities. It is my hope that this article will serve as a beginning of a much-needed conversation about priorities among archivists.

Introduction

For well over a decade, the archival profession has made increased discoverability via digitization and online finding aids a primary focus. Initial calls for online access were facilitated by the development of EAD in 1996[1] and the widespread availability of scanning technology.[2] These developments were followed by evaluations and usability studies that examined how researchers interacted with digital collections and online search tools.[3] Some have even raised the prospect of universal online access to information,[4] though this will likely remain impossible for many years to come. Our profession has also explored the impact of email and remote access on our reference activity,[5] but there has thus far been little written on the correlation between the push for online access and an increase in remote reference traffic.

LaRC: a case study in online outreach and discoverability

With roots extending back to 1889 and almost four linear miles of holdings, the Louisiana Research Collection at Tulane University is one of the older, larger, and more comprehensive research centers documenting Louisiana history and culture. Like many other archival institutions, the Louisiana Research Collection has worked in recent years to increase

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[1] For early discussion on implementing online finding aids, see Jill Tatem, "EAD: Obstacles to Implementation, Opportunities for Understanding," *Archival Issues* 23 (1998): 155-69; and Elizabeth H. Dow, "EAD and the Small Repository," *American Archivist* 60 (Fall 1997): 446-55.

[2] An early digitization project is described in John H. Whaley, Jr. "Digitizing History," *American Archivist* 57 (Fall,1994): 660-672.

[3] For three early examples of online search tool evaluations, see Kathleen Feeney, "Retrieval of Archival Finding Aids Using World-Wide-Web Search Engines," *American Archivist* (Fall 1999): 206-228; Helen R. Tibbo, "Primarily History in America: How U.S. Historians Search for Primary Materials at the Dawn of the Digital Age," *American Archivist* 66 (Spring/Summer 2003): 9-50; Burt Allman and John Nemmers, "The Usability of Online Archival Resources: The Polaris Project Finding Aid," *American Archivist* 64 (Spring/Summer 2001): 121-31.

[4] Brewster Kahle, "Universal Access to All Knowledge," *American Archivist* 70 (Spring-Summer, 2007): 23-31.

[5] Kristin E. Martin, "Analysis of Remote Reference Correspondence at a Large Academic Manuscripts Collection," *American Archivist* 64 (Spring/Summer 2001): 17-42; Wendy M. Duff and Catherine A. Johnson, "A Virtual Expression of Need: An Analysis of Archival Reference Questions," *American Archivist* 64 (Spring/Summer 2001):43-60.

accessibility by digitizing its archival holdings and converting legacy paper finding aids into an online format.

In 2008, when LaRC decided to prioritize increased accessibility, its search tools were woefully out of date. The primary access point to its archival holdings was an incomplete name-and- subject paper card catalog in wooden drawers. This catalog referred in turn to a series of paper finding aids in binders - a hodge-podge of item-level calendars, box-level inventories, and partial guides compiled according to inconsistent descriptive standards that changed from decade to decade.

The website offered a dozen PDFs of paper finding aids, but no other online search tools aside from the OPAC for published items, and no digital collections in the modern sense of the term. Several online exhibits displayed selected items from LaRC's collections, but these were meant to entice researchers to visit rather than to substitute for in-person research. We had participated in several grant-funded consortial digital projects, but lacked the capacity to create digital collections in-house.

With the 2008 addition of a cataloging librarian to its staff, LaRC began creating collection level MARC records for its most heavily-used collections. Another processing staff member began to create online finding aids using the Archon archival description software. Since these early starts, LaRC's online presence has expanded exponentially. In 2011, LaRC received funding for a retrospective archival finding aid project to outsource the conversion of legacy paper finding aids into an online format.

As of 2014, over 850 of our archival collections – representing more than 80% of our holdings by volume – now have online Archon finding aids that are easily discoverable through Google searches, and archival processing staff continue to create new finding aids in-house. We also have collection-level MARC records, which are searchable through our parent library's OPAC, for over 620 of our most heavily used archival collections.

LaRC has also made great strides in creating online digital collections by digitizing and creating metadata for some of our most important and heavily-used archival collections. Early LaRC digitization projects were chosen on the basis of research value and donor relations: our first true digital collection, an extensive collection of Carnival float and costume designs, was digitized and placed online in 2010. More recent digitization projects have been selected based on frequency of use in order to reduce reference load. Major new topical collections combine entire archival series from a number of different collections, for example "French Colonial, Spanish Colonial, and Nineteenth-

Century Louisiana Documents," have opened our holdings to an entirely new user base that would be unable to visit our reading room to research in person.

A sustained social media outreach campaign consisting of a new, regularly updated blog, Facebook page, Twitter account, and e-mail newsletter have further raised our archive's public profile.

Quantifiable successes: Reference by the numbers

All of these efforts have successfully raised LaRC's profile among diverse researcher groups. Our dramatically increased visibility has brought a huge influx of reference queries, many of them from new researchers who were unaware of LaRC or didn't previously have occasion or opportunity to use our collections. This increase in reference traffic can be attributed directly to the increased online discoverability of our collections. When a new finding aid or MARC record goes online, or when a new digital collection is unveiled, there is a direct increase in queries regarding that collection.

In the last four years, we've seen a 40% increase in overall LaRC reference transactions. This increase has not been evenly distributed among the various means of communication. The number of researchers physically visiting our reading room has increased by 19% between 2010 and 2014, which alone is significant growth, but the number of requests we respond to remotely via phone or email has exploded over the past four years. Email reference requests have increased by 69%; these interactions with remote researchers now constitute nearly half of LaRC's reference transactions. We've also had a 103% increase in phone reference and a 100% increase in requests to reproduce LaRC materials in publications and films. These permission requests indicate that much of our reference growth comes from serious researchers doing publication-quality work.

With this increase in numbers comes a qualitative shift in how researchers interact with archivists and archives. While some researchers still use footnotes, bibliographies, and other more traditional means of tracking down archival sources, most of our requests now come fromresearchers who have learned about our holdings through online searches. Many of these researchers have never been to an archive, do not understand what an archive is, and often do not fully grasp what they're looking at or who they're contacting. When a genealogist comes across their family's name in a finding aid during a Google search, much of the reference interaction is necessarily taken up with explaining the nature of archival work and what's possible without visiting to conduct research in person. There are common misconceptions: Are all of your documents available online? If not, can you

copy them for me, or do research for me? If not, why not? As reference archivists, we are now engaged in archival outreach, advocacy, and education with user groups we never would have interacted with in the pre-digital age.

Archives in the age of austerity

Outreach to new user groups, improved discoverability of sources, greater online visibility: all of these developments are unquestionably successes. As archivists, increasing access to our collections is a laudable goal which is rightly central to our profession. These successes accomplish our institution's calling to preserve and make accessible Louisiana's archival cultural heritage, and they represent in many ways the fulfillment of the profession's core goals. These successes, however, bring costs.

At a time when archival institutions find themselves fighting to preserve what funding they have, a dramatic increase in reference traffic strains the workload of already understaffed departments. LaRC's parent institution is a major private university with substantial resources; nonetheless, our archive's staffing levels have been cut by half over the past ten years. With this staffing situation, one archivist in a small 4-person department spends nearly 80% of his time responding to reference queries. Responding to reference requests is a time-sensitive task that is difficult to predict and plan for. We must find a way to handle this reference influx responsibly without unduly reducing vital services or neglecting other archival responsibilities.

Other institutions have fared much worse than LaRC. No matter the fiscal situation of our parent institutions, an archive that can successfully make the case for additional resources or staff is a rare one indeed. Given this austerity, what can we do to reallocate resources and determine which core functions should receive priority? Surely we cannot and should not go back to the days of pre-digital access, when archives were relatively inaccessible and hidden; closed off to the wider world beyond regular archival researchers with the time, resources, and familiarity to visit the reading room and successfully navigate paper search tools. As archivists it is our ethical responsibility to provide equitable access to our collections to any and all researchers regardless of their location or affiliation. While we can't provide the same level of access to remote researchers as we do to reading room researchers, we nonetheless consider responding to reference requests from remote researchers professionally, promptly, and courteously to be a priority and a primary responsibility.

The search for a sustainable way forward

Taking into account the dire staffing and funding levels common to so many institutions, this level of growth is unsustainable. LaRC has taken steps to decrease the amount of time we spend on reference questions in several ways. We have increased student worker involvement by training them to assist the reference archivist with reference requests by performing basic searches and assembling lists of potential sources in response to queries. We have worked to improve our website and our online search tools in order to make it easier for researchers to navigate our collections with less staff involvement. We have tried to reduce the types of searches we will conduct for long-distance researchers while still holding to the principle of maintaining open and equitable access. We have also been forced to impose a slight reduction in our reading room hours.

Our experiences in archival instruction may suggest one way forward. As part of an undergraduate-focused university, we have worked to make our holdings central to our students' education through an extensive undergraduate archival instruction program. Our early efforts were designed mainly as an outreach tool, focused on presenting LaRC as a welcoming environment for undergraduate research and as a repository with a wide array of fascinating archival sources. The instructional focus was on entertainment; therefore, much of each session was spent on archival show-and-tell with a lecture format, with lively explanations of archival documents displayed for students to examine as a single large group.

More recently, though, our approach to archival pedagogy has shifted. We have been bringing our instruction practice more closely in line with recent developments in the Reference, Access, and Outreach section of the SAA and have begun collaborating with other instruction librarians in our parent university library. We now work with faculty to make LaRC archival holdings a central component of the students' coursework, including as much consultation in syllabus and assignment design as is possible. In our instruction sessions, we have introduced ways for students to engage more closely with archival documents by designing small group discussions and in-class assignments which train students in evaluating archival sources. This has resulted in a significant improvement in the level of student interest and engagement with the documents and with the material covered in the sessions, as evidenced by a significant increase in the number of undergraduates who use LaRC in their research projects without a corresponding increase in the reference burden.

This successful instruction program has created a new, more skilled group of undergraduate users who are trained in doing archival research and thus more capable of self-directed research. Many of our other regular researchers are now familiar with how our online search tools work, and so also require less instruction and mediation by archival staff. For other user groups and for the general public, though, there has not yet been a similar shift from entertainment and enticement to more active education in archival research. Can we draw lessons from undergraduate instruction in educating the broader public?

There may be no easy answers, but in an age where our users expect universal online access to the world's information, we must help them towards a more realistic understanding of what is available online and what research services understaffed archival institutions can be expected to provide. The next step is determining how to do this, and it is my hope that this article might serve as a beginning to this necessary conversation among archivists.