



Assessment Annual Report

Service: Reference and Research Services, Special Collections and Archives Research Center (SCARC)

Fiscal Year: FY22 (2021-2022 academic year)

Overview

The SCARC Public Services Team manages the suite of public services offered by the Special Collections and Archives Research Center. These services include in-person reference, 5th floor reading room operations, remote reference and related digitization, facilities support, instruction support, permissions and publications requests, and interlibrary loans of non-SCARC materials.

The COVID-19 pandemic continued to impact SCARC Public Services activities, though not as significantly as in FY21. Onsite staffing remained limited when compared with pre-COVID levels, and several students continued to work hybrid schedules through AY 2021-2022, either regularly or intermittently. However, a deeper integration of students with the remote research process meant not only expanded services for our researchers, but an easing of the service load for staff.

Though we returned to the 5th floor, and our students returned primarily to onsite work, the Public Services Team approached onsite, “day of” Reading Room service in a new way in FY22. Under the by-appointment model, and with only two in-person researchers scheduled per appointment block, Student Archivist assistance in the Reading Room seemed less of a necessity, and this was proven correct with the resumption of research appointments in the Reading Room in fall 2021. Student Archivists continued to be engaged in public services support, collection management, and special projects work, but were stationed as back-ups in the workroom, rather than in the Reading Room, and this modification did not present any issues.

In FY22, we worked to expand our onsite services, and continue expanding our remote research services. We continued to offer access to collections on a by-appointment basis, with operations returned to our Reading Room on the 5th floor in fall 2021. The decision to discontinue in-stacks tours and staff-led Pauling Office tours was formalized in fall term, and the [Guide to the Special Collections and Archives Research Center](#) was updated accordingly.

Our takeaways included: the effectiveness of a by-appointment only onsite collections consultation model; the benefits of expanding our remote research services with support from Student Archivists and the long-term benefits of saving scanned materials for future

use; the merits of Open House hours, regardless of metrics; and the need to continue to support and engage in decision-making regarding digitization efforts.

Based on our FY22 takeaways, for the 2022-2023 academic year, SCARC intends to:

- strategically expand remote research services through targeted, reference access scanning in collaboration with departmental colleagues
- expand by-appointment offerings for AY 2022-2023
- continue offering Open House hours and finding new ways to capitalize on these hours to showcase collections, engage Student Archivists, and collaborate with curators
- continue to strategically invest in and support digitization initiatives, including the implementation of OD2 and other nascent or on-going projects (e.g. digitization of [Aerial Photographs of Benton, Lincoln, Linn, Marion, and Polk Counties, 1936-1979](#)).

Strategic Significance:

The content of this report has direct bearing to all strategic goals of OSULP, including emphasizing high quality services and expertise. In the actions described below we also show our dedication to building and strengthening our relationships with OSU students, faculty, staff, OSULP colleagues, and the wider global community of scholars to support their research with our collections. SCARC's Public Services staff is proud to find creative and innovative solutions to complex challenges in our pursuit of continuous improvement.

Takeaways:

By-Appointment Only Onsite Collection Consultations: A Better Model for Staff and Researchers

As reported in the [Reference and Research Services assessment for FY21](#), the by-appointment model offered benefits for both patrons and Public Services staff. Engaging with researchers in advance of their visit allowed researchers to be more thoughtful in their selection of collections, more prepared to engage with the materials, and make more efficient use of their research time. Additionally, in several cases, Public Services staff were able to offer a portion of the materials requested available digitally, allowing researchers to review the entirety of the remaining requested materials in a single visit. This was especially useful and appreciated by out-of-town researchers.

The by-appointment model also allowed Public Services staff time to more deeply consider the patron's research topic, and better recommend materials germane to their interests. The rapport established in these pre-visit conversations - whether by Zoom or email - notably decreased the "archival anxiety" by some researchers new to research in SCARC, or archival research in general.

This model allowed the team to explore different staffing models for reference service as well, specifically transitioning to a staff-only service model for research appointments. In the past, a Student Archivist and staff member were scheduled together for each of the two, three-hour reference shifts during open hours. Scheduling 30 hours of student desk coverage often necessitated hiring more Student Archivists than was sustainable by the Public Services unit, and student project supervision was often offloaded onto others in the department in order to meet Public Services desk coverage needs. This dual supervision often resulted in pinch points between Public Services staff who were managing students' public services work, and other SCARC staff who were managing students' project work.

Under the by-appointment model, however, a more sustainable student supervision model is also possible. With fewer researchers in the Reading Room, and advanced knowledge of their interests and needs, Public Services staff are able to manage research appointments solo. Subsequently, fewer students are needed to support research appointments; during research appointments, students instead spend their time in the workroom and are called on only as needed (e.g. for restroom breaks, limited additional paging). Students hired to support public services operations, work only on projects designed *and* overseen by Public Services staff, with an eye towards improving service efficiency, making materials more accessible for researchers, and improving physical control of archival materials.

Additionally, to better relay the physical accessibility of SCARC's research space prior to a researcher's appointment, an [Accessibility](#) section has been added to the Conducting In-Person Research section of the Welcome to SCARC LibGuide. This section outlines the physical terrain outside the Valley Library, accessible entrances and exits, number of elevators and their locations, the location of gender-neutral / gender-inclusive restrooms in the Library, and doorway clearances into SCARC Reading Room.

See "Appendix A: Circulation Data" for data regarding the researchers who made onsite use of collections, and the materials they used.

Remote Research Services: A Further Expansion of Services, Student Edition

Offering expanded research digitization services continued to be an essential component of our by-appointment model. Not only does it reserve onsite appointments for those researchers requiring several hours at a time with our collections, but provides our services more equitably to those researchers unable to visit SCARC in-person, regardless of the reason.

The expansion of research digitization services was formalized as an on-going collection management task for Public Services Student Archivists in fall 2021. Between September 24, 2021 (the date of the first student-managed digitization request) and June 30, 2022, SCARC Student Archivists captured 5,247 scans, representing a little over 44 hours of student labor, and over 72% of the total annual scans to date (7,267).¹ By way of comparison: in 2021, at the height of the pandemic, 7,742 scans were made.

Other In-person Offerings: Open House hours see mixed success

In the interest of expanding service offerings each term, the Public Services team piloted Open House hours in spring term to provide Library visitors the opportunity to look around the Reading Room, take a self-guided tour of the Linus Pauling office, and ask general questions about our collections and services. Interim Director, Natalia Fernández, also had the brilliant idea to repurpose a past exhibit - the *Piles to Files* exhibit - as a smaller, tabletop version.

Open House hours were offered on Wednesdays from 10:00am to 1:00pm, and were staffed by two Student Archivists working in 1.5 hour shifts. During their shifts, Student Archivists used a simple Google "tick sheet" to track the number of visitors, and the reason for their visit. An FAQ document created by Rare Books and History of Science Librarian Anne

¹ Scanning completed by students is tracked more generally in LibAnswers, and specifically in the Research Services Digitization Tracking sheet; staff scanning is only tracked in LibAnswers and is presented as a range, rather than as discrete numbers.

Bahde was repurposed and expanded to assist the two Student Archivists during their shifts. Onsite Public Services staff members shared back-up duties during Open House hours.

Between Week 1 and Finals Week of spring term, SCARC offered 11 Open House sessions for a total of 31 hours.² Of the 33 total visitors, 21 (~63%) were simply interested in looking around the space. This is our most common “type” of visitor and, anecdotally, Public Services staff have long suspected that seeing someone sitting behind a big desk in an open space is intimidating enough to scare off some visitors who might otherwise come in and ask questions.

Of the remaining 12 visitors, one wanted to know the purpose of the Reading Room (~3%); three were interested in making an appointment and/or looking at specific materials (~9%); four were interested in touring the Pauling Office (12.5%); and four had other questions (12.5%). Of this last category, one visitor was directed to the Reading Room for a meeting with Hops and Brewing Archivist, Tiah Edmunson-Morton; one wanted to know more about the “lady at the door” (our life-size, cardboard Ida Kidder is just outside the entrance to the Reading Room); and two were looking for Instruction and Outreach Librarian Laurie Bridges.

Though Open House hours visitorship was low, it presented an opportunity to showcase collection materials as well. For example, after hosting an ART 263 class session on May 4, 2022, materials staged for the class were left out on the Reading Room tables for Open House hours. Further, continuing to offer Open House hours, regardless of how well attended, contributes to an impression of openness, and may help counter the perception of SCARC as a place that is “closed all the time.”

Next Steps:

Develop an Expanded By Appointment Model for Fall 2022

As discussed in last year’s assessment, with fewer staff working on the 5th floor in FY23, and the subsequent continued deficit in “back-up” Public Services FTE, matching the schedule and/or hours of pre-pandemic fiscal years is untenable. Further, statistics gathered for FY22 seem to support anecdotal observations, indicating there is limited demand for drop-in research hours. Of the 180 appointment blocks made available over the course of the academic year, only 101 were reserved (roughly 56%).

Term	Appointments Offered	Appointments Booked	Researchers Possible	Researchers Served
Fall	68 ³	32 ⁴	68 ⁵	33 ⁶

² We had one class visit overlap with our Open House hours, but reopened as soon as the class concluded (3 hours x 11 sessions - 2 hours for SOC 318 = 31 hours).

³ This accounts for several holidays (Veterans’ Day and Thanksgiving), capacity closures (Anna Dvorak, Public Services Assistant, being out 10/22 and 10/25), and one closure due to a class visit.

⁴ This does not include canceled appointments, and counts rescheduled appointments only once.

⁵ 44 slots - 6 slots for holidays / closures = 38 x 2 possible people per day.

⁶ We had two cancellations, and three reschedules. This number *does* count each repeat visit as a separate instance.

Winter	76	47	76	21
Spring	66 ⁷	22	66	16
TOTALS	180	101	218	70

Happily, across [fall, winter, and spring terms](#), only 5 researchers were prevented from making an appointment⁸ at all; in the vast majority of cases, Public Services staff were able to find alternate times convenient to the researchers, or were able to fully support their research remotely.

In the interest of continuing to increase capacity for in-person research, the Public Services team has settled on the following expanded appointment model for fall term 2022:

Mondays: 10:00am - 1:00pm, 1:00pm - 4:00pm

Tuesdays: 10:30 - 1:30pm, 1:30 - 4:30pm

Wednesdays: Open House hours, 10:00am - 1:00pm; no appointments offered

Thursdays: 10:30 - 1:30pm, 1:30 - 4:30pm

Fridays: 10:00am - 1:00pm, 1:00pm - 4:00pm

We will continue to schedule two patrons per time block, with an optional third spot available for researchers using microfilm exclusively. The addition of a second, three hour appointment block each day brings the total possible appointment slots per week to 24.

Given this expanded service model, a more formalized system of student back-up may need to be implemented, especially if we choose to begin offering paging on demand services. Depending on the amount of uncovered back-up hours, this may also necessitate hiring one additional Public Services student.

Approach Research Services Digitization More Proactively and in Collaboration with the Instruction and Arrangement / Description teams

In tandem with the benefits presented by the appointment model, the Public Services team has identified opportunities created by the new student supervision model and subsequent increase in Public Services student labor, specifically a student-driven model of remote research digitization.

Future plans include a targeted and strategic expansion of research digitization through the identification of materials that either a) serve both instructional and public service needs and/or b) complete the digitization of a collection with a significant portion already digitized (e.g. [National Association for the Advancement of Colored People \(NAACP\) Corvallis Branch Records](#)).

⁷ Four days of Director Search visits, one University-wide holiday, and two class visits (both on the same Tuesday), affected this total slightly.

⁸ Three of these were due to appointment requests that fell during intersession closures, and in only one case was the researcher unable to visit at an earlier or later date. Two were students in the GEO 511 class who wanted to visit as a pair on days where a researcher was already scheduled; both students declined offers to come in separately.

Further, efforts will be made for future larger-scale, “reference use” (i.e. low resolution) scanning projects managed by Public Services students to dovetail with [SCARC’s on-going anti-racist actions and principles](#). A collaborative Google sheet has been created so that all SCARC staff may add additional requests and suggestions, and the Research Services Digitization workflow has been amended to include updating finding aids as a final step in scanning.

Explore Additional Ways to Capitalize on Open House hours

The Public Services team has already begun to have conversations about how Open House hours might “feed two birds with one seed,” both providing an opportunity for library visitors to view the spaces while also highlighting SCARC’s diverse array of materials. Using collection materials from previous exhibits, “in the can” instruction sessions (e.g. ART 263), and in partnership with curators, Open House hours might serve as a way to engage visitors more informally with our collections.

Further, these presentations of collections might provide a great opportunity for interested SCARC students to get experience in “curating” materials around a topic or theme, working with other department members than they would regularly, and presenting those for the public.

Strategically Invest In and Support Digitization Initiatives and Projects, including the Implementation of Oregon Digital 2 (OD2)

With the implementation of the SCARC Digital Projects Team in June 2021, and the integration of Public Services staff on that team, we expect to engage in conversations to develop digitization projects informed by our remote reference requests, and to make data driven decisions regarding digitization efforts that will be useful to a wide variety of researchers. For example, data continues to show that OD is a widely and heavily used resource, both by researchers and by Public Services staff, and trends indicate that it will be increasingly used as time goes on. ⁹ With this in mind, Public Services staff are positioned to use data about most frequently consulted collections to identify collections for future digitization and upload. Public Services staff has also engaged in UX testing at various stages of OD2 implementation.

Further, as part of SCARC’s FY22 departmental budget conversations, we made the decision to dedicate funds to outsourcing the digitization of materials that cannot be digitized in-house (e.g. microforms, some A/V formats), as well as funds for specialized digital projects equipment. Additional work is currently in the planning phase, and Public Services staff will continue to work with members of the DPU and Digital Project team to help identify the best “bang for our buck” materials to send out for digitization.

Finally, in January 2022, Public Services requisitioned the purchase of a DSLR camera ([Canon EOS M50 Mark II](#)) and 8 foot column stand ([Manfrotto 231B Column Stand](#)). Used together, this set-up will allow Public Services staff to capture oversize materials they were previously unable to capture on the BookEye or with other in-house technologies, which will further expand the unit’s remote access capabilities.

⁹ See *Appendix B* for a chart which details past years’ tagging data (page 15). It should be noted that tagging wasn’t consistently used or standardized before 2020.

Assessment:

The Public Services Team meets weekly to develop, assess, and modify policies and procedures; think strategically about future needs and adjustments; identify and loop in stakeholders, both in SCARC and library-wide; and collaboratively write assessments and reports. Data was collected and analyzed as a means to drive, direct, and inform these conversations.

Collection use and patron type statistics were captured through the circulation of materials in Alma, to include:

- Patron type
- Collections circulated
- Collections most frequently circulated
- By collection type (e.g. manuscript, record group, photographs, oral histories)

Public Services staff also captured remote reference transaction data using the reporting features in LibAnswers, to include:

- Patron type
- When we were contacted (month, day of the week, and time of day)
- How we were contacted (e.g. phone, email, mail, Archon)
- Transaction type (e.g. reference transaction, reference appointment request, use / publication permissions request)
- Area of interest (e.g. OSU history, genealogy, local history, History of Science, rare books)
- Time spent per transaction
- Time spent paging and identifying materials (only for digitization requests)
- Time spent digitizing materials¹⁰
- Reproductions per transaction
- Ticket tagging data

Using a shared Google sheet, Public Services Student Archivists, captured remote reference digitization data, to include:

- Total scans
- Total time spent scanning
- Time spent preparing materials for scanning (as necessary)

Respectfully submitted,

SCARC Public Services Team

July 30, 2022

Rachel Lilley, Team Lead
 Anne Bahde
 Anna Dvorak
 Natalia Fernández
 Kevin Jones
 Chris Petersen

¹⁰ The “Time spent paging and identifying materials,” and “Time spent digitizing materials” metrics were additions to the SCARC Info Analytics since the last annual assessment.

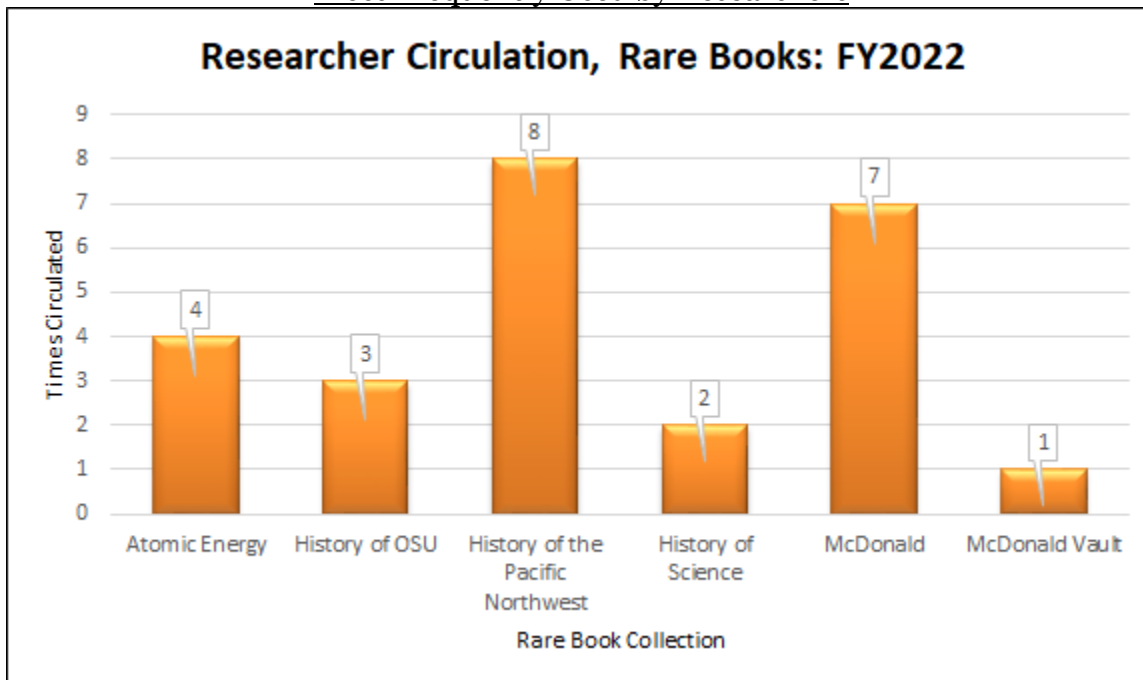
Attachments

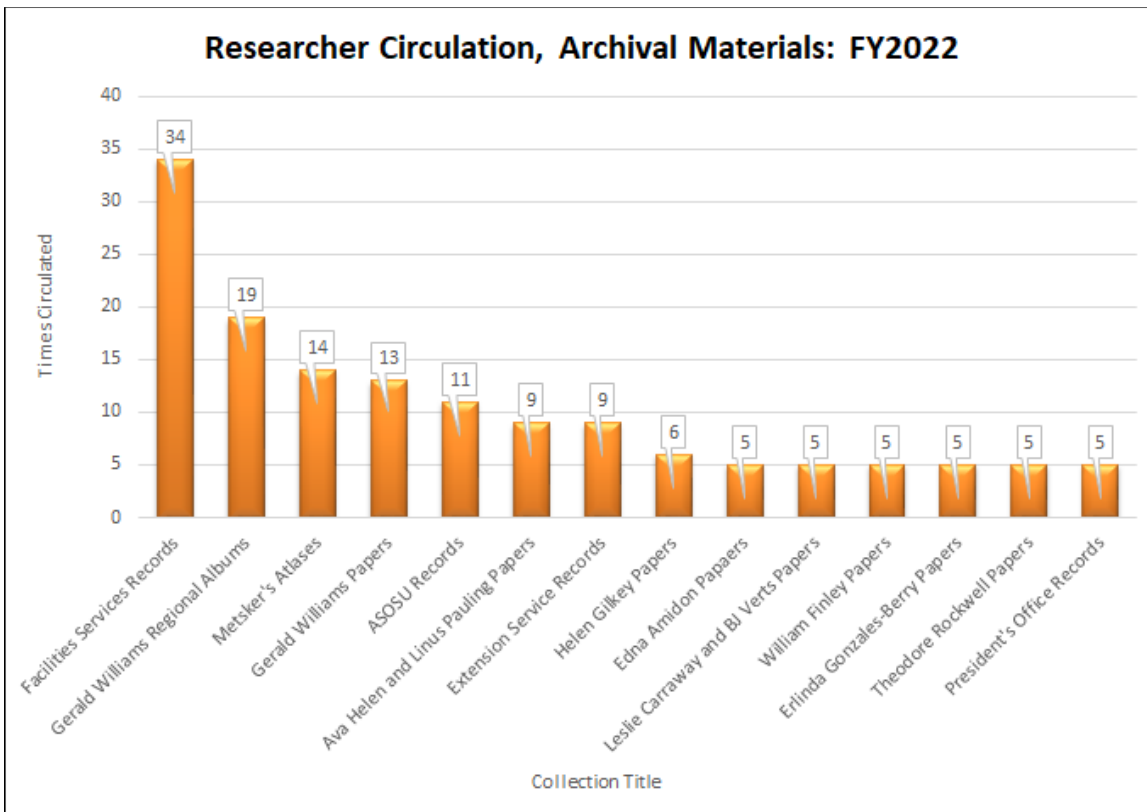
List of Appendices

- Appendix A: Circulation data tables (Alma Analytics)
- Appendix B: Remote research support data tables (LibAnswers)

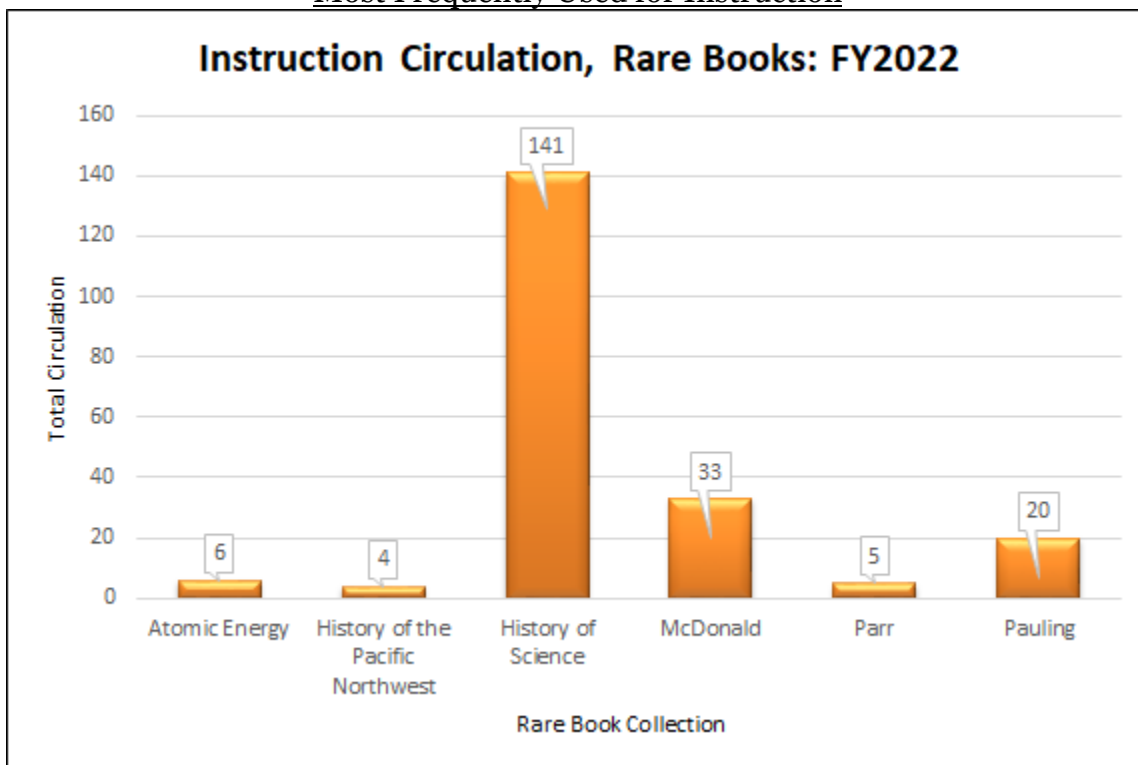
Appendix A: Circulation data tables (Alma / Analytics)

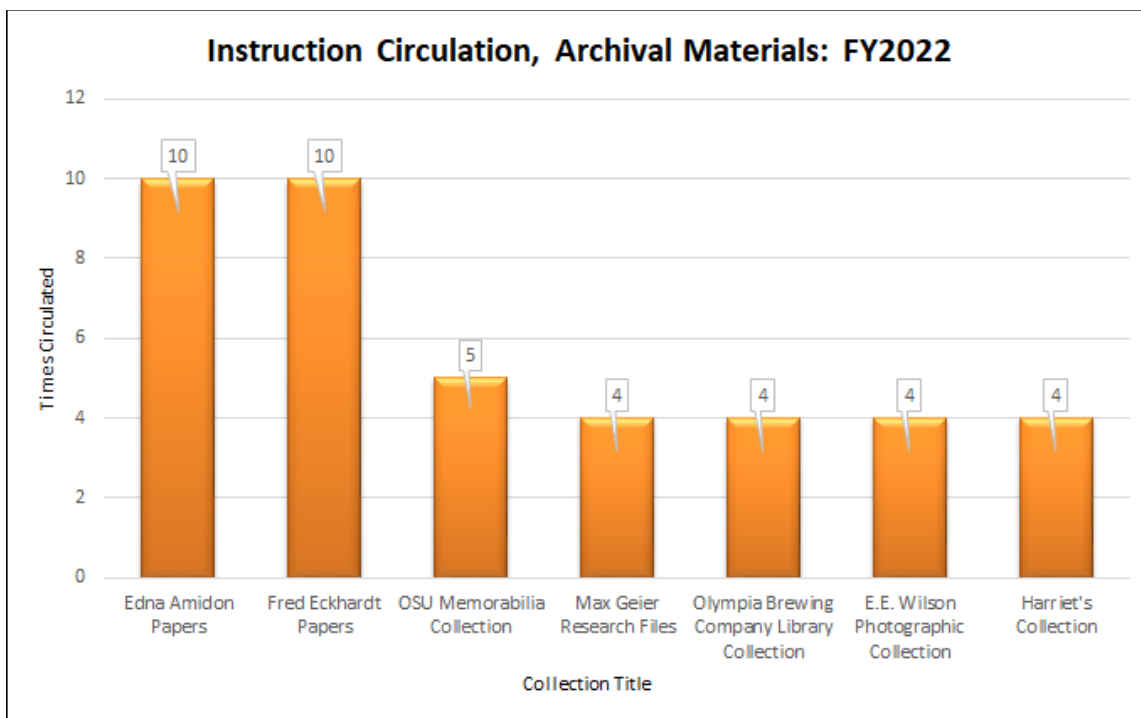
Most Frequently Used by Researchers



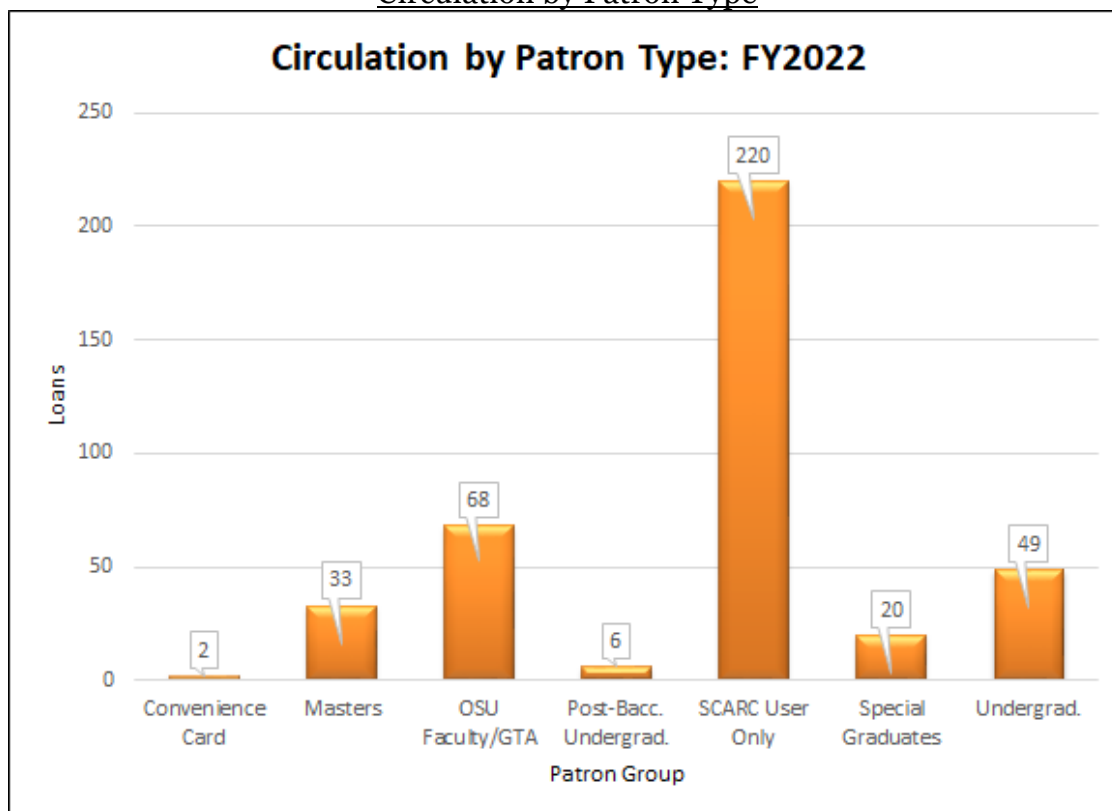


Most Frequently Used for Instruction





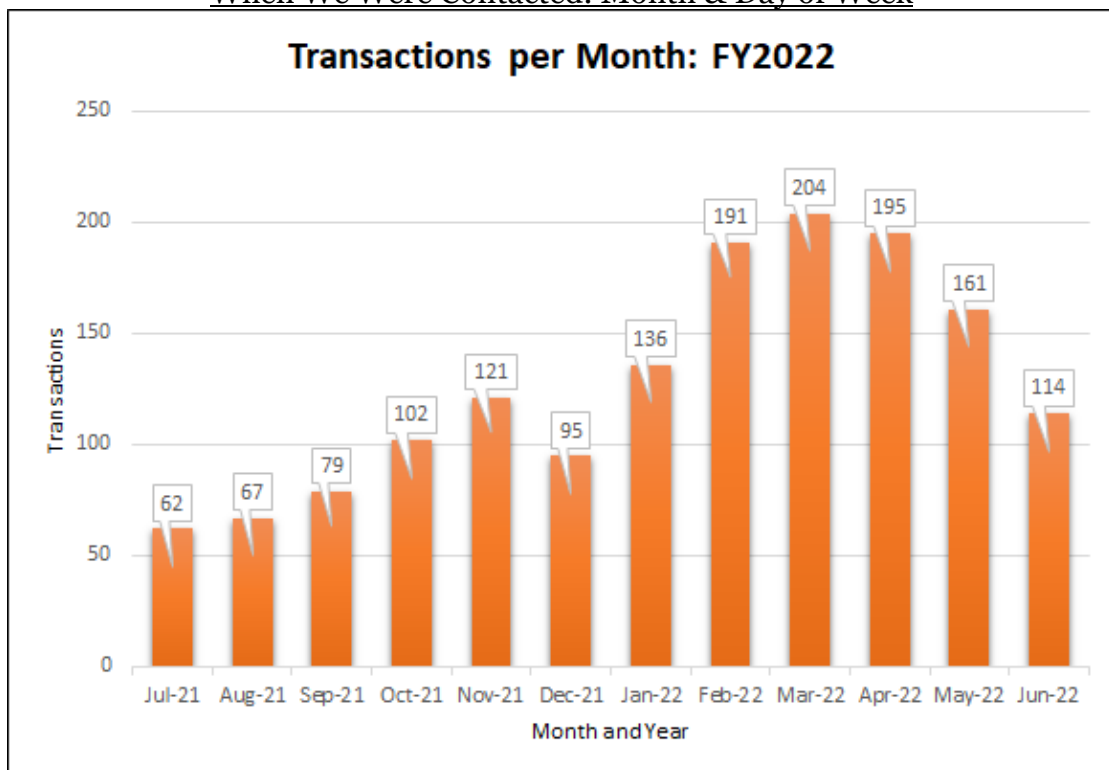
Circulation by Patron Type

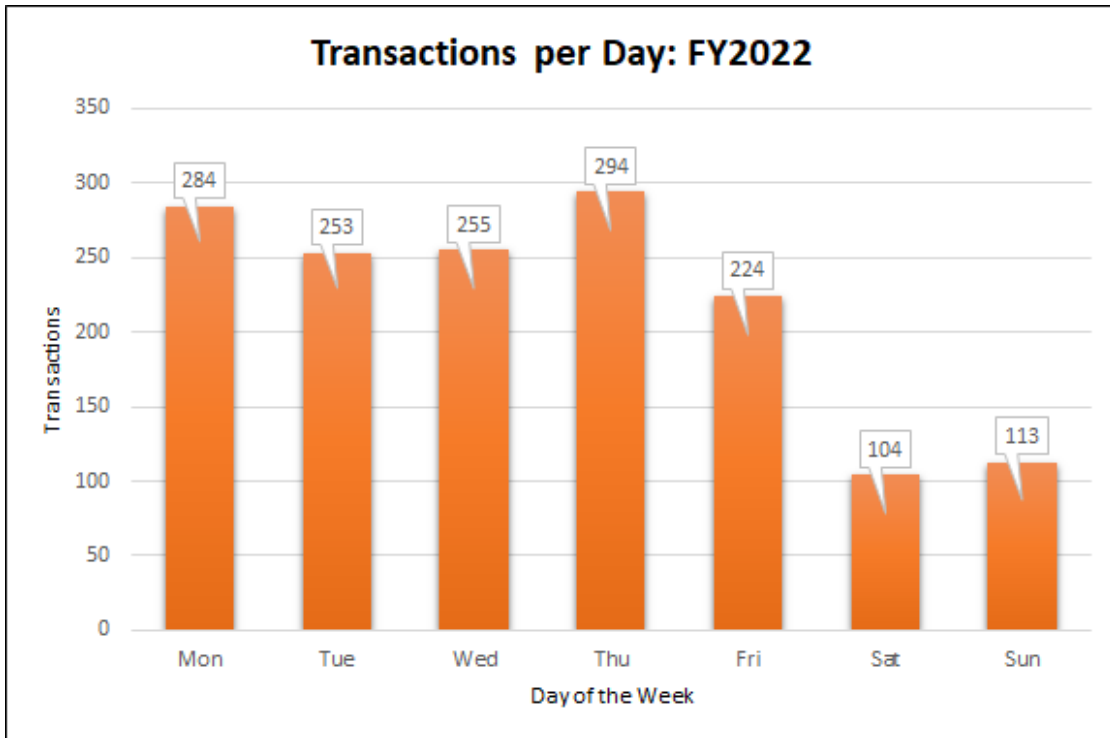


Appendix B: Remote research support data tables (LibAnswers)

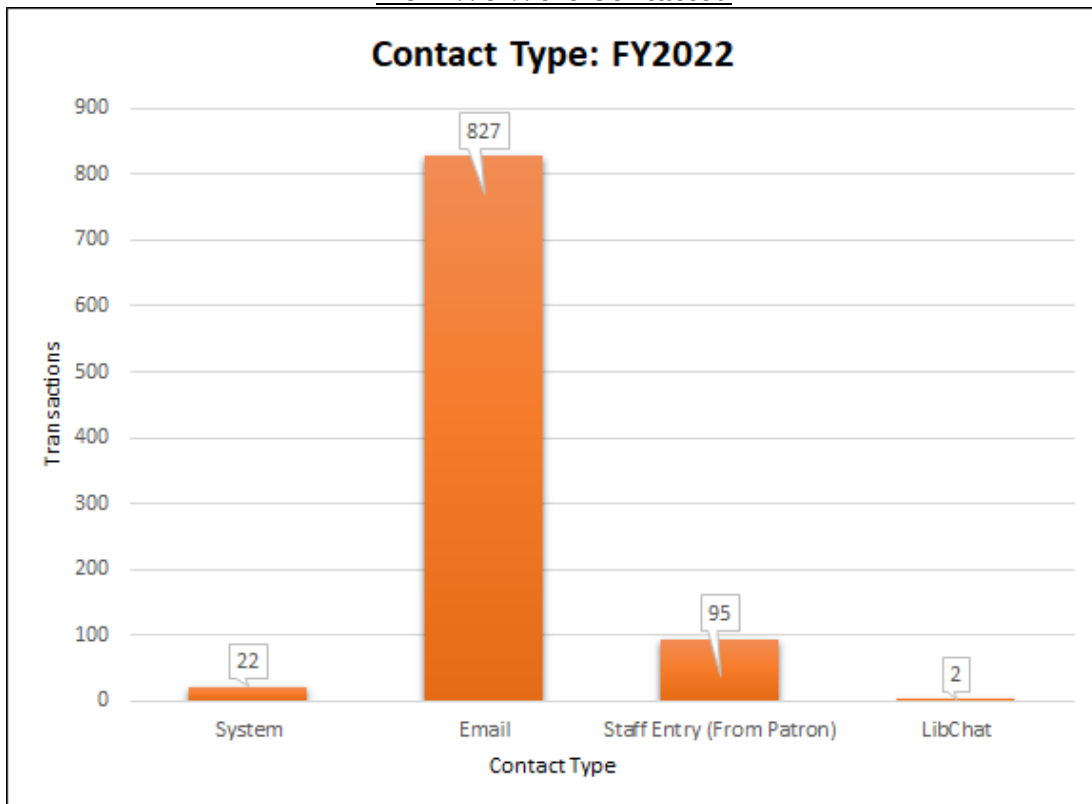
In total, SCARC's Public Services staff managed and/or responded to 946 reference transactions in LibAnswers in FY2022 - roughly 18 per week.

When We Were Contacted: Month & Day of Week

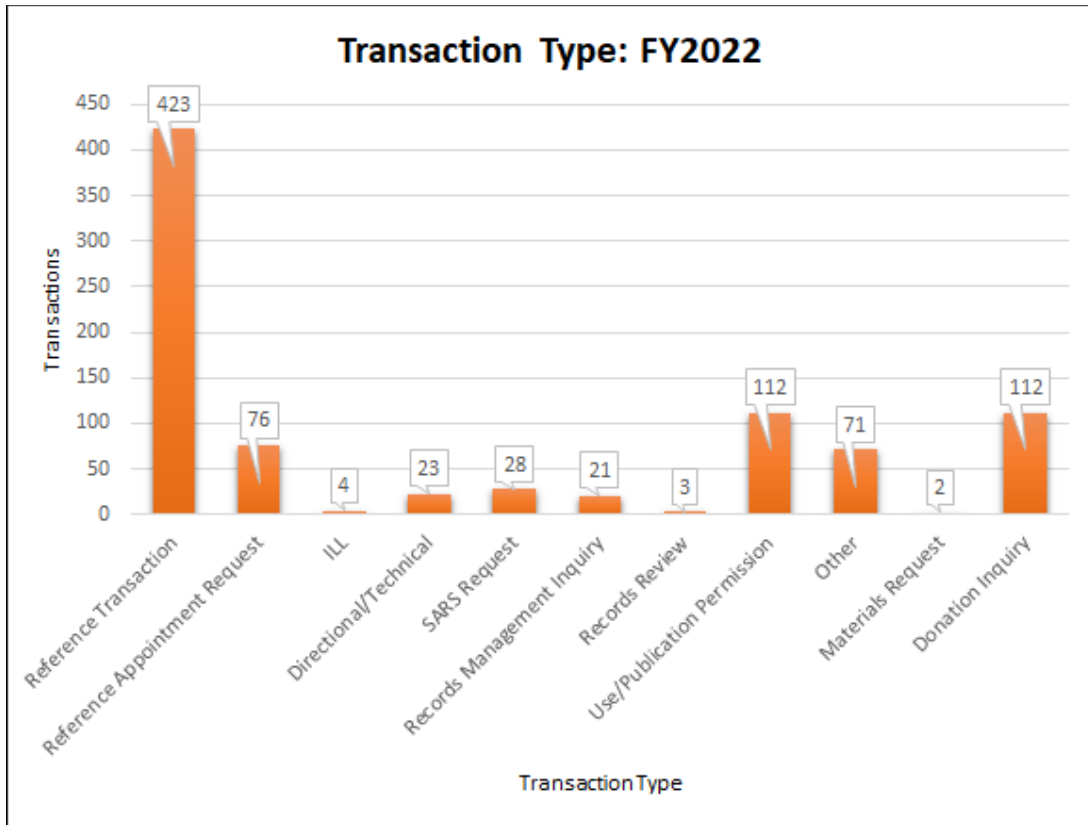




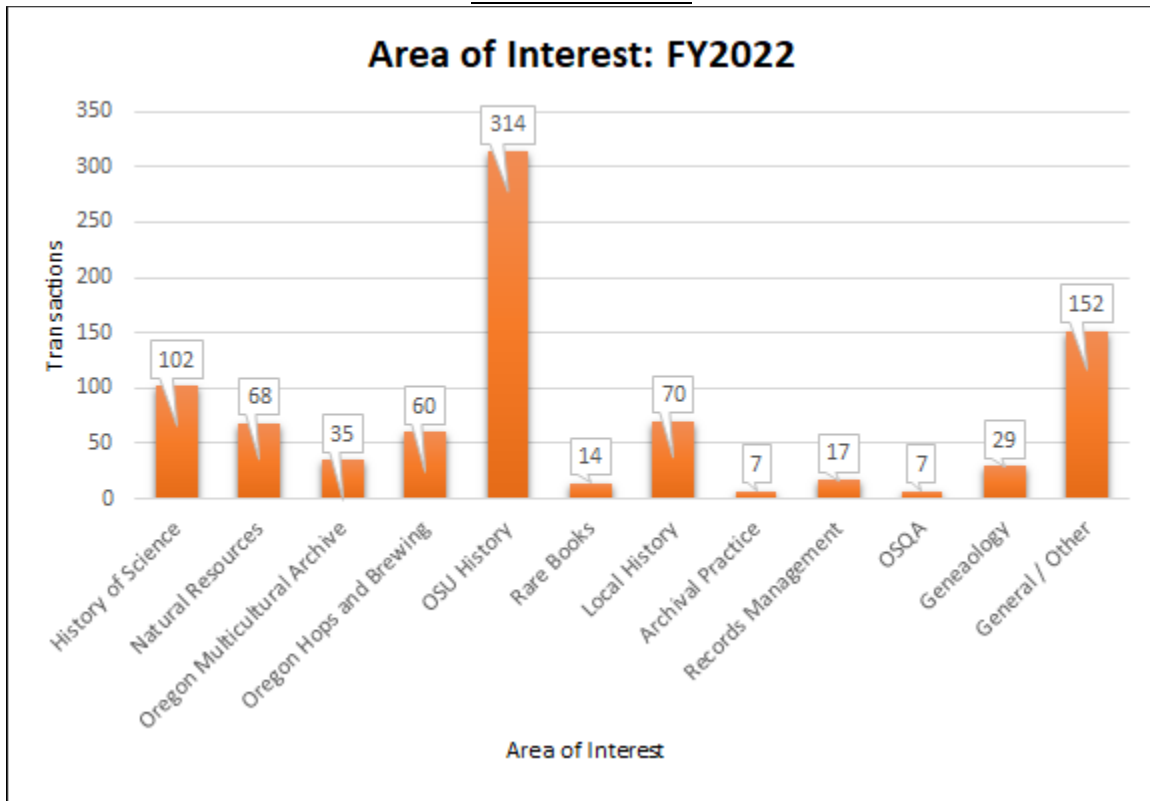
How We Were Contacted



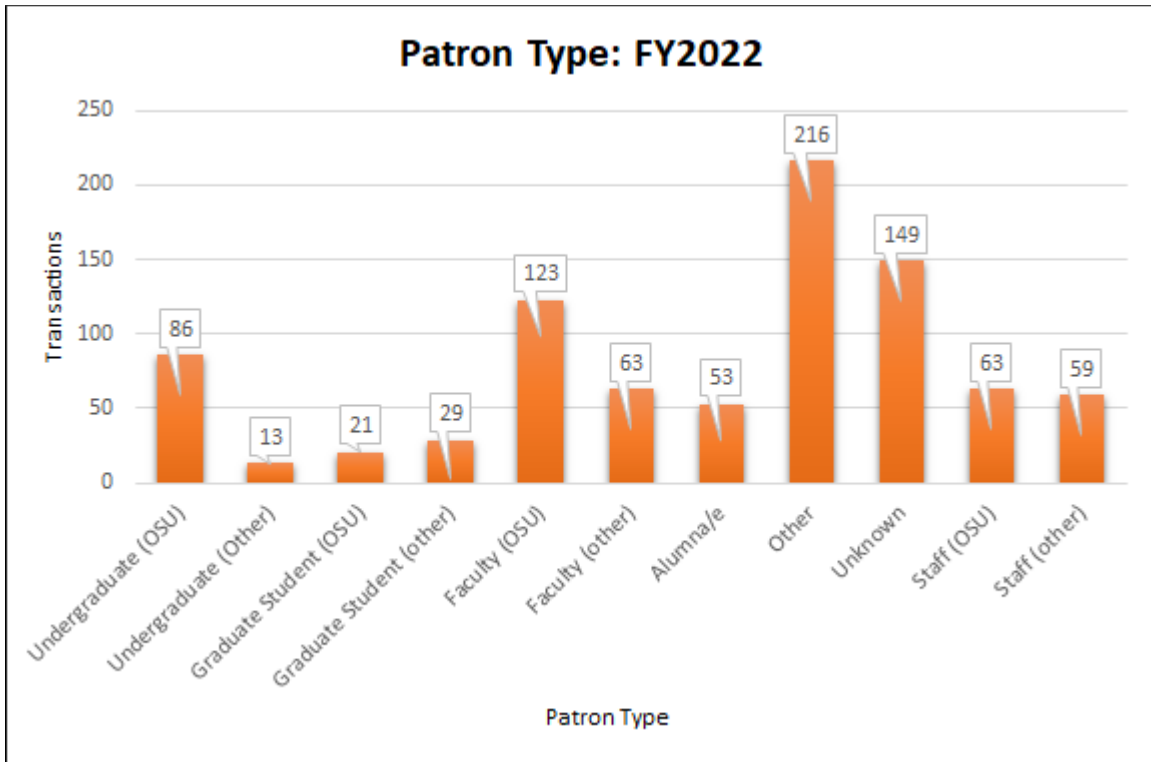
Why We Were Contacted



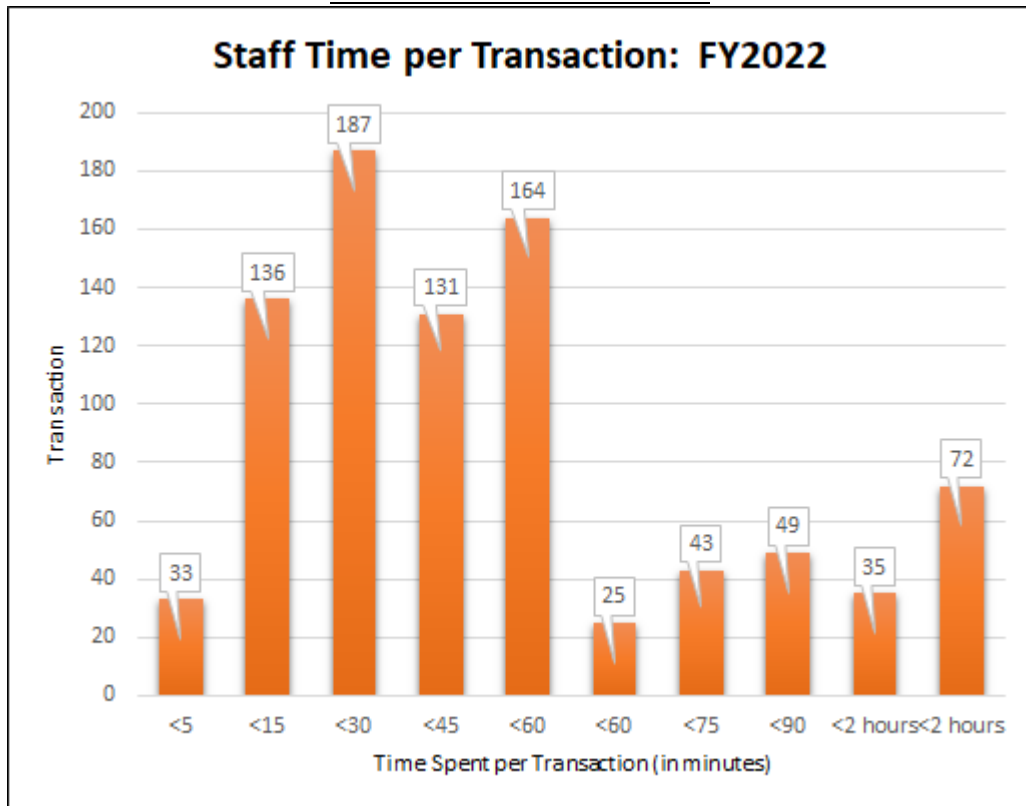
Area of Interest



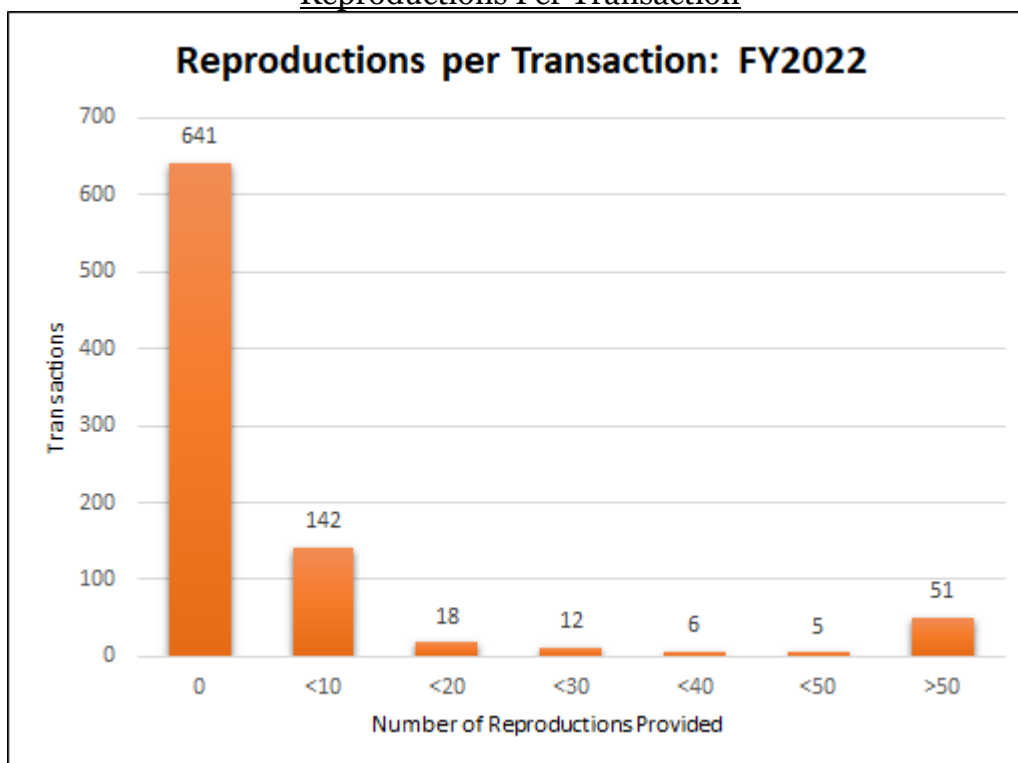
Who Contacted Us



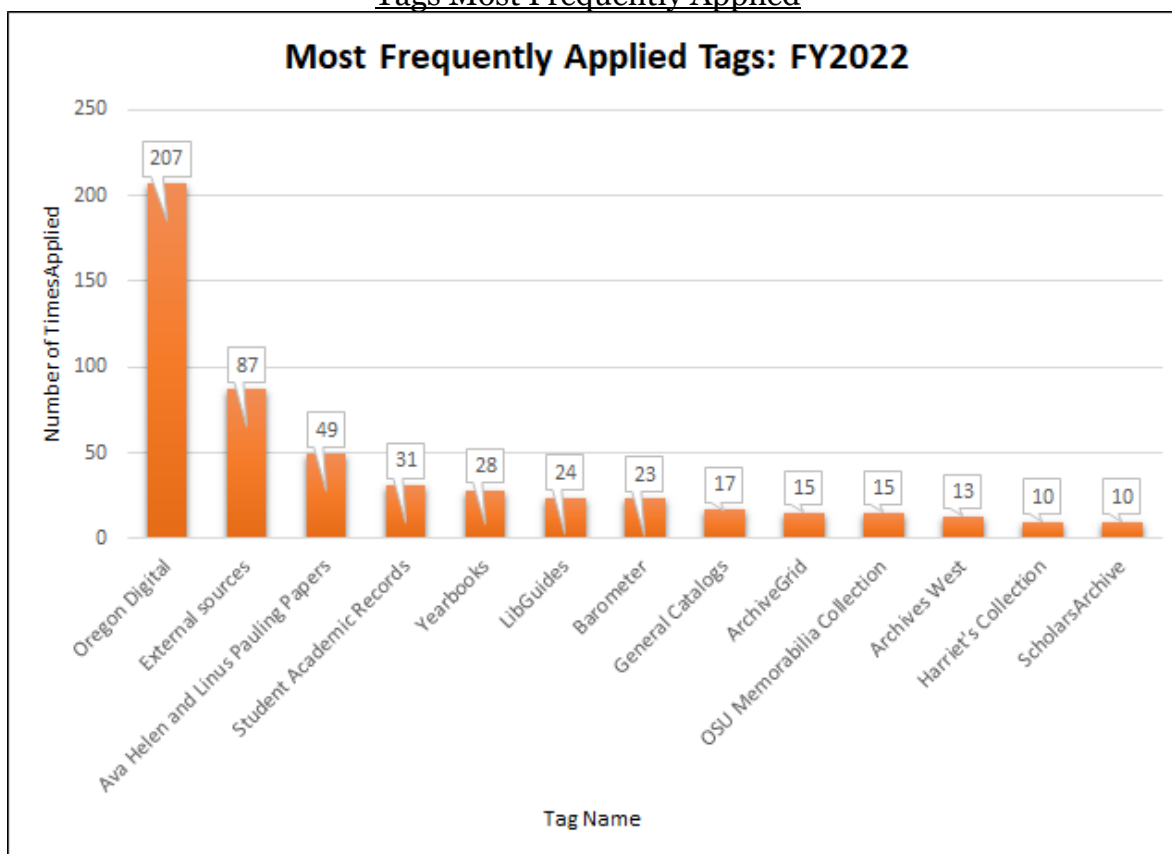
Staff Time Per Transaction



Reproductions Per Transaction



Tags Most Frequently Applied¹¹



¹¹ The application of tags to reference transactions in LibAnswers was formalized and standardized in November 2020.

