Oregon State University
Libraries and Press

Assessment Annual Report

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

Fiscal Year: FY23 (2022-2023 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 facilitating access to interlibrary loans of non-SCARC materials.

Further expanding student's interactions with, and support of remote researchers that began during the pandemic has continued in subsequent years, including FY2023. Students continue to expand SCARC's capacity for remote research support through targeted, on-demand digitization, and began in earnest this year to support future research and instruction through the Proactive Digitization Project. In some cases, students are also asked to correspond directly with the researcher regarding completed digitization requests, easing work loads on Public Services staff, and providing students the opportunity to engage with our researchers and reap the rewards of their labor. Student Archivists continued to also be engaged in collection management and special projects work, staffing Open House hours each week, and as back-up to Reading Room operations during onsite research appointments.

An expansion of the by-appointment model, combined with on-demand digitization services offered to remote researchers, continues to exceed demand. In FY2023, appointment blocks were increased from one, three-hour appointment per day on Mondays, Tuesdays, Thursdays, and Fridays, to two, three-hour blocks per day on Mondays, Tuesdays, Thursdays and Fridays. Of those appointment blocks, only 35% were reserved for in-person research, on average across the academic year.

Despite the limited demand for in-person appointments, the by-appointment model continues to have the added benefits of: allowing for a deeper, ultimately richer, one-on-one engagement between service provider and researcher; helping to establish rapport early between Public Services staff and researchers, thus decreasing "archival anxiety;" providing timelier opportunities for service providers to tap into the deep subject knowledge of departmental colleagues, providing better all-around service for patrons; and allowing Public Services staff more time to prepare for in-person appointments, including gathering necessary collections and research tools (e.g. light pads for slides), and identifying any preservation issues in advance. It's also well worth

noting that all iterations of the by-appointment model have made it easier for Public Services staff to take sick and vacation leave as needed, which has improved work-life balance for front-live Public Services staff.

Though Open Houses this year saw visitation numbers similar to last year, informal Collection Showcases (aka Special Open Houses), saw far better numbers. In fall term, total visitation across 15 Open House days was 22 people; the vast majority of those visitors (13; 59%) were "just looking around." By contrast, in Winter term, SCARC offered two Special Open Houses, one using materials paged for an artist books course, and the other using materials paged for a data visualization course. These Special Open Houses increased the total visitor count for winter term to 75; visitors who were simply interested in the space still made up the majority (33; 44%), but those who visited specifically to attend the Special Open Houses made up a statistically significant portion of the remainder (15; 20%). Additionally, hosting a second Open House in May as part of Bring Your Kid to Campus Day events, brought nearly 100 visitors to the Reading Room. The Open House count for spring term was a staggering 155, 127 (82%) of which visited during one of the two Special Open Houses.[1]

Based on our FY23 takeaways, for the 2023-2024 academic year SCARC intends to:

- continue offering Open House hours.
- pilot a more formalized, quarterly Collection Showcase / Special Open House model, including outreach workflow, and schedule of responsible staff, with the target of full implementation in Fall 2023.
- identify potential service enhancements and/or expansion through a Researcher Satisfaction Survey.
- continue to expand remote research services through targeted, reference access scanning (i.e. the Proactive Scanning project) with input from departmental colleagues, and especially as that work relates to on-going EIDAR work.
- continue to identify ways in which Public Services can be flexible in support of instruction.
- continue to engage in policy discussions (e.g. data privacy), both internal and external to SCARC in order to strengthen relationships and better steward our collections.

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.

[1] In addition to the Bring Your Kind to Campus Day Open House, an Open House drawing from the Ava Helen and Linus Pauling Papers, and documenting Pauling's work on proteins, was held May 24.

Takeaways:

Expansion of the appointment model not met with a matching increase in demand

In FY 2022-2023, SCARC made good on the promise regarding the expansion of appointment offerings in last year's assessment. Instead of just one, three-hour appointment block per day during the academic year, SCARC offered two, three-hour blocks per day on Mondays, Tuesdays, Thursdays and Fridays (one block in the morning, and one in the afternoon). Summer hours have been expanded as well.[2]

This expansion, however, did not see a subsequent increase in demand; a comparison of the percentage of appointments booked between FY2022 and FY2023 yields insight. In FY2022, 70 appointment slots were offered each term, on average. Just 56% of those appointment slots were reserved for in-person research. By comparison, in FY2023, SCARC offered, on average, 161 appointment slots per term; on average, just 56 slots were reserved for in-person research, roughly 35%.

Interestingly, though total reference transactions this fiscal year have decreased, LibAnswers tickets do suggest an increased *interest* in appointments. In FY2022, in total, SCARC's Public Services staff managed and/or responded to 875 reference transactions in LibAnswers, roughly 18 per week. Of those 875 tickets, 76 were requests for appointments (8.7%). In contrast, in FY2023, SCARC's Public Services staff managed and/or responded to 787 reference transactions in LibAnswers; 138 of these transactions were appointment requests (17.5%).

Term	Appointments Offered	Appointments Booked	Researchers Served
Fall	166[3]	85[4]	26
Winter	170[5]	44[6]	36
Spring	148[7]	43	22
TOTALS	484	168	78
AVERAGES	161	56 (~35%)	26

[2] Four-hour appointment slots were offered on Tuesdays, Wednesdays, and Thursdays in summer 2022; in summer 2023, six hours will be offered on Tuesdays and Thursdays, and four hours will be offered on Wednesdays.

[3] This accounts for holidays (Veterans' Day, Thanksgiving, and two weeks over the Winter Break), capacity closures (staff vacations), candidate visits (December 8 & 9), and curtailing services during two weeks of the Winter Break (no Monday or Friday appointments offered).

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

[5] This accounts for holidays (Martin Luther King, Jr.), capacity closures (staff vacations), and curtailing services during Spring Break (no Monday or Friday appointments offered).

[6] This count includes 1-hour artist books appointments, which were counted as a full appointment.

[7] This accounts for holidays (Memorial Day), capacity closures (staff vacations and Northwest Archivists conference), University Archivist candidate visits (May 15), instruction sessions (April 11, June 8), and events (Bring Your Kids to Campus Day, May 12).

For AY 2023, the inverse relationship between the *increase* in appointment requests, and *decrease* in appointments booked may have a simple, service-related explanation. Under SCARC's pre-pandemic drop-in model, public services staff generally restricted on-demand digitization services to those researchers who had no other way of visiting SCARC in person, often out-of-state or international researchers. Additionally, digitization offered to these researchers was typically fairly limited in scale. SCARC's current by-appointment model, coupled with the increase in student capacity to assist in research service support, has allowed and encouraged public services staff to more readily and frequently offer on-demand digitization services. In many cases, it's simply easier and more efficient to offer to digitize materials of interest to a researcher and, tellingly, each researcher offered digital surrogates this year preferred that option to an in-person research appointment. This approach has several benefits, not least of which is to make SCARC's collections more accessible to a broader range of researchers.

Anecdotally, but perhaps significantly, the Public Services Unit Supervisor and Public Services Assistant have also both noted that at no point did any researcher inquire about a return to drop-in hours, suggesting the by-appointment model has been normalized. That being said, in order to better identify and respond to existing and emerging researcher needs, the Public Services team is drafting a researcher satisfaction survey, with the hopes of taking the survey live in fall term 2023.

Special, "spotlight" Open Houses see success

SCARC continued to offer Open House hours on Wednesdays during the 2022-2023 academic year. Summer Open Houses were shifted to afternoons from 2:00 to 4:00pm beginning June 28. A number of OSULP staff have provided helpful feedback regarding this shift, namely that the later Open House hours provide those with later work shifts or lunches the opportunity to visit during Open House hours. It should also be noted that keeping Open House hours as consistent as possible has been suggested by several OSULP staff external to SCARC, and concentrated efforts will be made to ensure timing - and messaging (e.g. on the SCARC website and elsewhere) - are as consistent as possible in FY2024 to mitigate any confusion.

Standard, weekly Open House hours continue to see minimal interest. Open House hours were piloted in spring term 2022; between March 30 and June 8, Open House hours saw just 33 visitors across 27 Open House hours; most visitors to the Reading Room during Open House hours were simply exploring the library and/or had questions about the function of the space (~63%).

However, instruction sessions and outreach events offered throughout FY2023 provided the opportunity to host special, "themed" Open Houses that showcased a specific topic or type of material.[8] These special Open Houses have been far better attended than

[8] Instruction sessions that doubled as special open houses included: ART 263 (Digital Photograph), ENG 217 (Reading for Writers), BA 375 (Applied Quantitative Methods), and BB 407H (Honors College Biochemistry / Biophysics seminar). Materials paged for the Ephemera Society of America visit (October 12) provided the same opportunity as these instruction sessions.

SCARC's standard Wednesday Open Houses. For example, the Artists' Books Showcase prior to the ENG 217 class session (18), and the Data Visualization Showcase subsequent to the BA 375 class session (6), saw 24 visitors combined, 32% of the total visitors for winter term (75). A recent special Open House centered on Linus Pauling's work with proteins saw 28 visitors (close to 18% of the total visitor count for the term). Sending calendar invitations in advance of these special Open Houses has proven effective in further increasing visitation, and feedback from OSULP staff has been positive in this regard. Moving forward, calendar appointments will be an essential component of any formalized Special Open House workflow.

SCARC's Public Services and Outreach teams plan to work collaboratively over the summer month's to: select a regular day and time on which to host Special Open Houses; determine workflows and responsibilities; formalize a schedule for the year; and invite participation from all interested members of the department.

Expanded integration of students in remote research support and accessibility work provides opportunities for fulfillment

Public Services staff continued to look for ways to more deeply embed Public Services Student Archivists in the day-to-day work of research assistance and support. Public Services students continued to staff Open House hours, with staff serving in a back-up capacity. They were also offered opportunities to take on more responsibility as relates to remote reference services, namely communicating with researchers regarding their scanning requests, and updating finding aids to reflect when materials have been digitized and are available by request.

Digitizing in support of researchers, and then directly communicating with those researchers, provides students a higher level of ownership over the work they do in support of our researchers, and provides a level of fulfillment, especially considering the genuine gratitude of our patrons. It is a way for them to get credit directly, and feel a sense of accomplishment. It's certainly worth noting that with Student Archivists managing some of this work, Public Services staff are freer to undertake more complex projects.

Flexibility at the forefront

In addition to expanding available appointment blocks, in FY2023 the Public Services team worked together to identify ways to be flexible and nimble in order to meet the needs of instruction. One specific example that will likely be useful as a template for future classes was the approach taken with ENG 217 (Reading for Writers, Artist's books). The class assignment required that students make an additional follow-up visit to SCARC to work with the artist book(s) they'd selected as inspiration for the assignment. The number of students in the class, combined with the recognition that individual students likely would not need an entire three-hour appointment block, presented an opportunity for developing a novel and creative approach to reserving appointments.

In consultation with Rare Books and History of Science Librarian Anne Bahde, the three days following the class visit were reserved exclusively for students from ENG 217, and each three-hour appointment block was broken up into one-hour blocks. Accommodation was made for up to four students within each one-hour block. An appointment sign-up sheet was used to gather the names, emails, and artist book titles of each student in the class; this sheet was subsequently used to send out Researcher Registration forms, and add each student's name and their selected artist book to SCARC's Outlook calendar. This approach had a number of benefits: it provided more than enough research blocks for students in the class, was expansive enough to fit with all but one student's schedule, allowed Public Services staff to set-up any especially delicate artist's books in advance of students' visits, and created an atmosphere of sharing and engagement in the Reading Room. The positive outcomes of this approach suggest future use and adaptation of this model.

In two instances during FY 2023 - for ENG 217, and HST 317 - the Public Services Unit Supervisor engaged directly with classes on the day of their first in-person visit. In the first instance, the PSUS explained to students how the adjusted appointment model would work including: the length of each appointment block (one hour, instead of the typical three), the number of students allowed per one-hour block, how to sign-up for a slot, and what follow-up communications they could expect to receive after class. In the second instance, the PSUS - in consultation with SCARC instructor Tiah Edmunson-Morton - provided direction on how and when students should request additional collection materials for their weekly labs, and how and when they might schedule supplementary appointments outside those labs. In both cases, this direct engagement positively impacted follow-up appointments and interactions, making for smoother booking and other appointment-related logistics.

It is also worth noting that collections were added to the Proactive Scanning Project's tracking list in support of instruction, and/or were subsequently used in classes due to the existence of digital copies created by the Public Services Unit. For example, digitization of the entirety of the United States War Relocation Authority Reports was completed in February 2023; the collection was subsequently used in HST 310 (the Historian's Craft) in May. The World War II Scrapbooks, the East Asia Military Deployment Photograph Album, the Oregon State College History of World War II Project Records, the East Asia Military Deployment Photograph Album, and selections from the Edna P. Amidon Papers were also digitized in support of this course. Due to the digital support provided - primarily by Public Services Student Archivists - only one student from HST 310 needed to request an in-person appointment.

Though SCARC, as a department, had previously decided to discontinue in-stacks tours, and to offer Pauling Office access only during Open House hours, in FY2023 Public Services staff found ways to be flexible regarding Pauling Office tours, provided they did not significantly affect existing appointments, *and* there was available capacity. Under these parameters, tours were offered to three small groups of faculty members and their

guests. At this time, continuing to consider these requests on a case-by-case basis, with determinations made using non-public-facing policies, seems most prudent.

Policy updates and generation deepens and strengthens relationships

Working collaboratively to identify policy needs, and/or update existing policies, continued to strengthen inter- and intradepartmental relationships in FY 2023. In collaboration with members of the Library Experience and Access Department (LEAD) and the Research and Learning department (R&L), SCARC's Public Services Unit Supervisor and its Interim Director discussed the current uses of patron / researcher data, and considered possible updates to OSULP's existing data privacy policy. Over the course of several months, SCARC's own retention policies were charted and formalized by the Public Services team and the department as a whole, and a retention period of 10 years was set for LibAnswers specifically. The interdepartmental team - LEAD, R&L, and SCARC - will meet again in 2026 to reconsider how patron / researcher data is used and retained.

As members of the Digital Projects team, Public Services staff also provided input on, and helped to craft, a new audio-visual access policy; SCARC's website and LibGuide have been updated to reflect this new policy (see "Access to Audio-visual Materials" section of both sites). This policy represents a move towards better stewardship of these unique, vital, and often delicate, records.

EIDAR work continues to be an embedded and active cornerstone of Public Services

Work on the Proactive Scanning project began in earnest in FY2023. Over the course of a 6-month period (between December 2022 and June 2023), Public Services Student Archivists have scanned over 9,500 pages of material across a wide variety of collections, including those that document un- or under-documented groups. Included are the National Association for the Advancement of Colored People (NAACP) Corvallis Branch Records, the Women's Center Scrapbooks (RG 243), and the Activities of Women Scrapbook, 1909-1930.

In addition, after engaging in collaborative discussions with SCARC LibGuide authors, the Public Services Assistant, Anna Dvorak, has taken the lead on adding Alt Text to existing LibGuides and/or guiding students in that work. Further, based on feedback from Library partners and department colleagues, she has also taken the lead on updating all public-facing signage to create clearer, *and* more welcoming and engaging signage in SCARC's physical spaces.

Next Steps:

Create a user satisfaction survey

The Public Services team is currently working on a Research Satisfaction survey in order to identify user needs and gauge satisfaction with existing service offerings and, perhaps, gain further insight into the decrease in in-person / onsite research. The scope

and specifics of that survey are still to be determined, but the team hopes to begin sending the survey out to both in-person and remote researchers in fall 2023.

Formalize monthly Special Open House program for AY 2023-2024

Working in collaboration with other members of the department, especially the Outreach Coordinator, the Public Services team hopes to formalize a quarterly hosting schedule for Special Open Houses in FY 2024. This work would include: identifying a consistent schedule; identifying subjects, topics, or genres that could be showcased, and charting those out in advance; and identifying and assigning responsibilities for curation, set-up, and take down for each Special Open House.

Public Services staff will also lead efforts to ensure Open House hours, and messaging about those hours, are as consistent as possible (e.g. updating the SCARC website and LibGuide language), and will continue to send calendar appointments to all OSULP employees when special Open Houses are offered.

Continue to show flexibility, engagement, and creativity in all areas of public services support (i.e. instruction, outreach, etc.)

Continued flexibility will be needed when it comes to instruction in FY 2024, and the Public Services unit stands ready to respond to the unique circumstances presented by some instruction situations, and willing to flex "regular" reading room policies based on class needs when possible. Further, the Public Services unit will continue to refine messaging regarding appointments and appointment logistics to make those processes less opaque for students and instructors, and to offer direct engagement with classes at instructors' request.

Public Services staff will also continue to identify useful additions to LibAnswers metadata. In FY 2023, "Instruction Inquiry" was added to the Transaction Type drop-down in the Analytics menu, and other additions may surface that will allow for more insightful and granular data gathering (e.g. "Instruction follow-up," "class assignment").

Continue to actively engage in and contribute to SCARC's EIDAR work, and look for ways to more deeply embed EIDAR principle in day-to-day Public Services operations and policies

In collaboration with instructors, subject experts, and other departmental colleagues, the Public Services team will continue to identify collections to digitize in whole or part as part of the Proactive Digitization Projects.

Public Services team members will also continue to actively participate in and contribute to SCARC's EIDAR work, including actively engaging in discussions during EIDAR-dedicated meetings, and serving on small groups and task forces as needed. The PSUS and PSA will also explore options for embedding SCARC Student Archivists more deeply in this work (e.g. updating finding aids with harmful content statements).

Finally, the Public Services team will continue to review existing policies, procedures, and resources with an eye towards anti-racist actions and practices, and making its services more equitable and accessible.

Continue to engage in inter- and intra-departmental policy discussions in order to strengthen relationships and better steward SCARC collections

In FY 2023, the PSUS and Interim Director met with members of the LEAD and R&L departments to consider OSULP's data privacy policy; this working group will reconvene in 2026 to reconsider how patron / researcher data is used and retained. In the meantime, the Public Services team will continue to keep data privacy in mind as data is gathered and used in decision making and day-to-day operations.

Further, similar to the drafting of SCARC's new policy regarding audio-visual materials access, the Public Services team will continue to partner with departmental colleagues to update and implement new policies as we actively and continually consider the health and longevity of our collections in all formats, digital and otherwise.

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
- 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)
- Transaction type (e.g. reference transaction, reference appointment request, 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 materials (logged in 5- and 15-minute increments)
- Reproductions per transaction (logged in increments of 10)
- 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 15, 2023

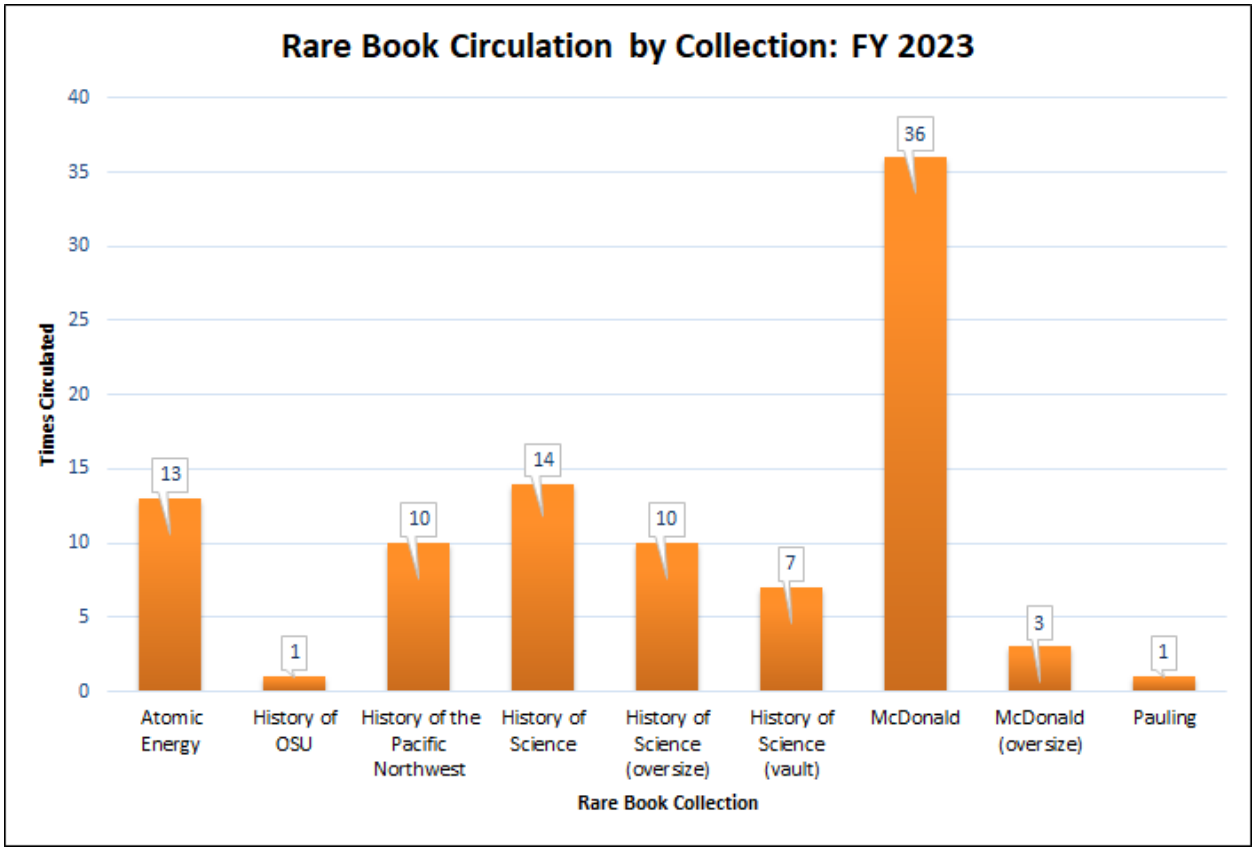
Rachel Lilley, Team Lead
Anna Dvorak
Anne Bahde
Natalia Fernández
Kevin Jones
Julie Judkins
Chris Petersen

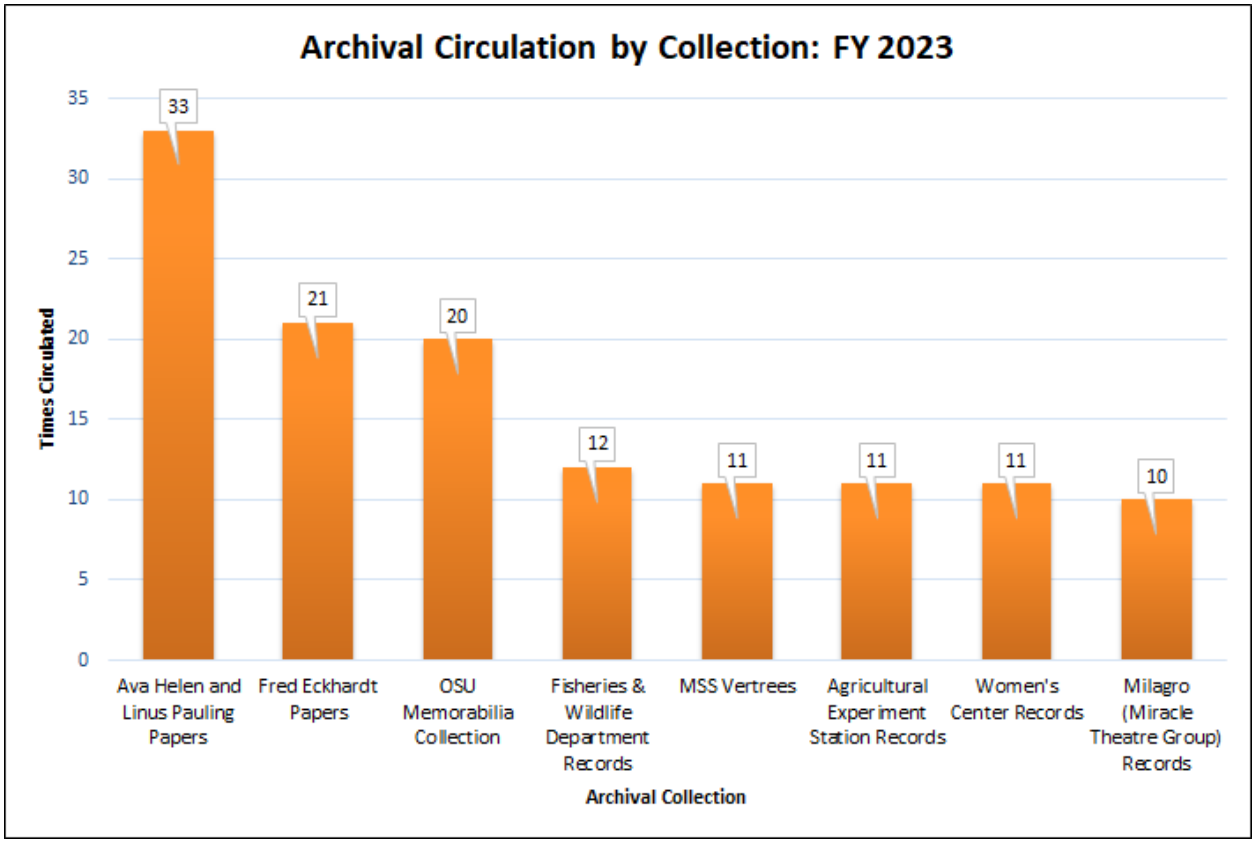
Attachments

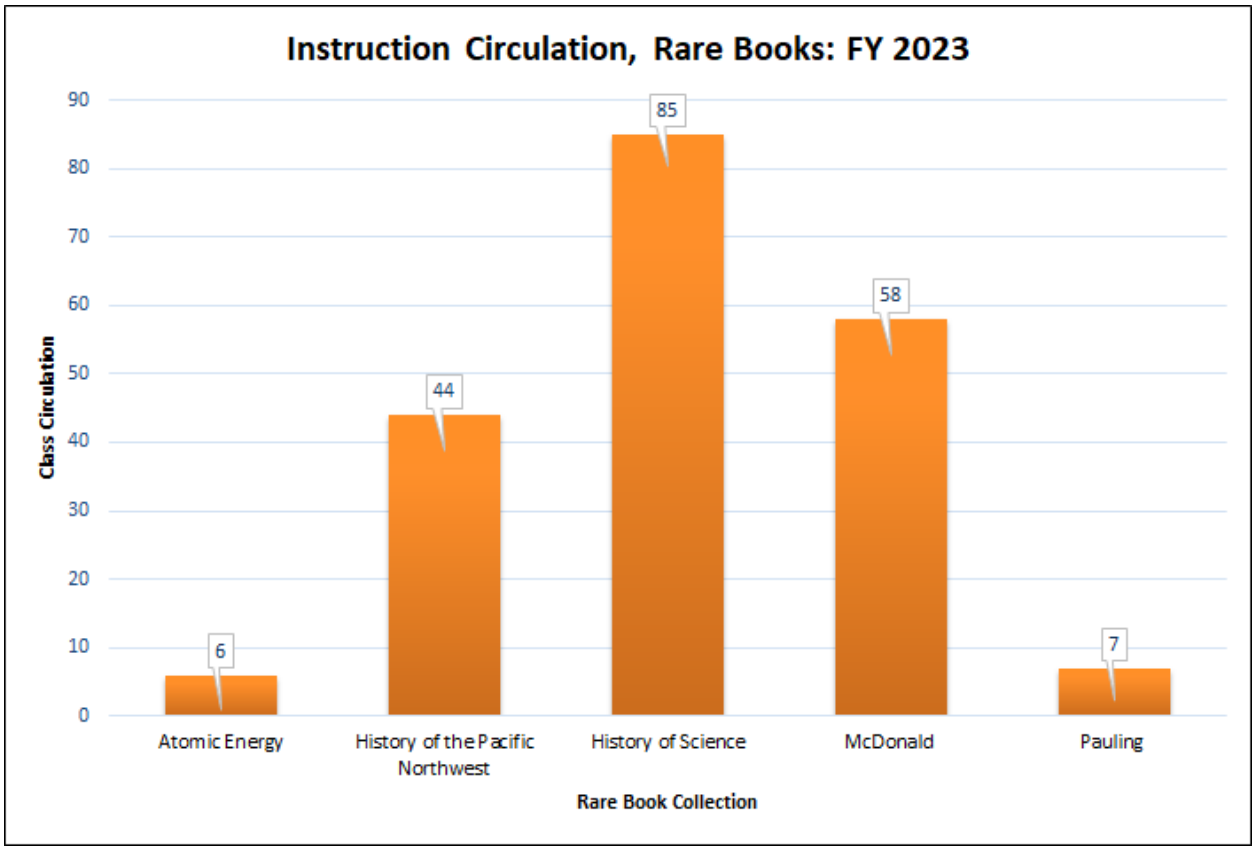
List of Appendices

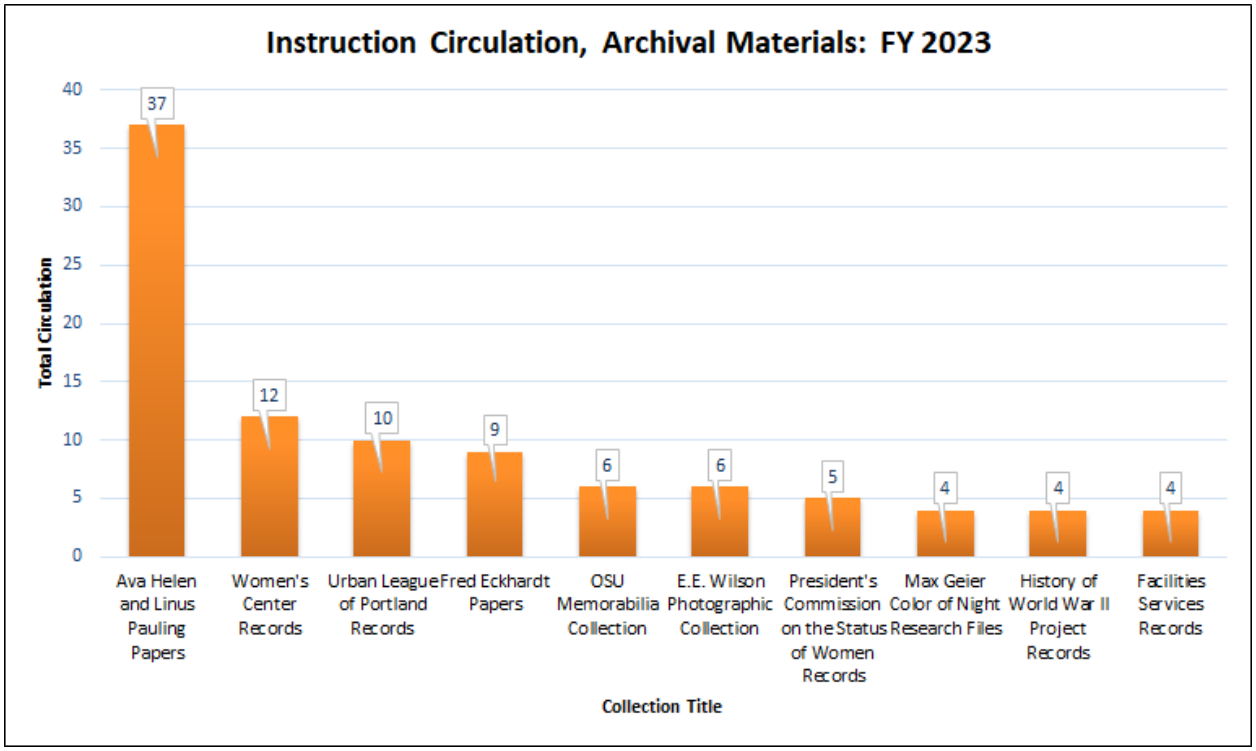
- Appendix A: Circulation data tables (Alma Analytics)
- Appendix B: Remote research support data tables (LibAnswers)

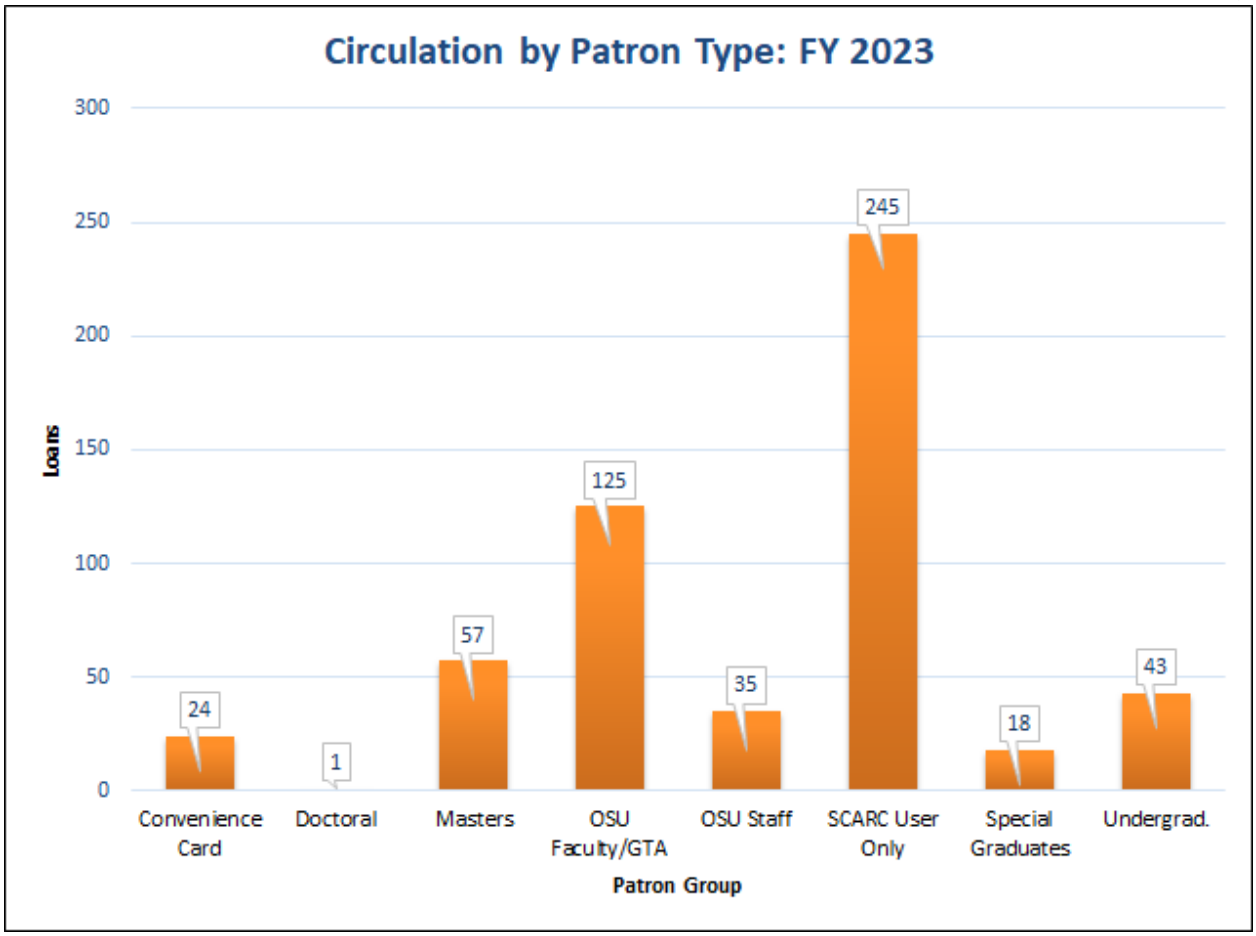
Appendix A: Circulation data tables (Alma Analytics)





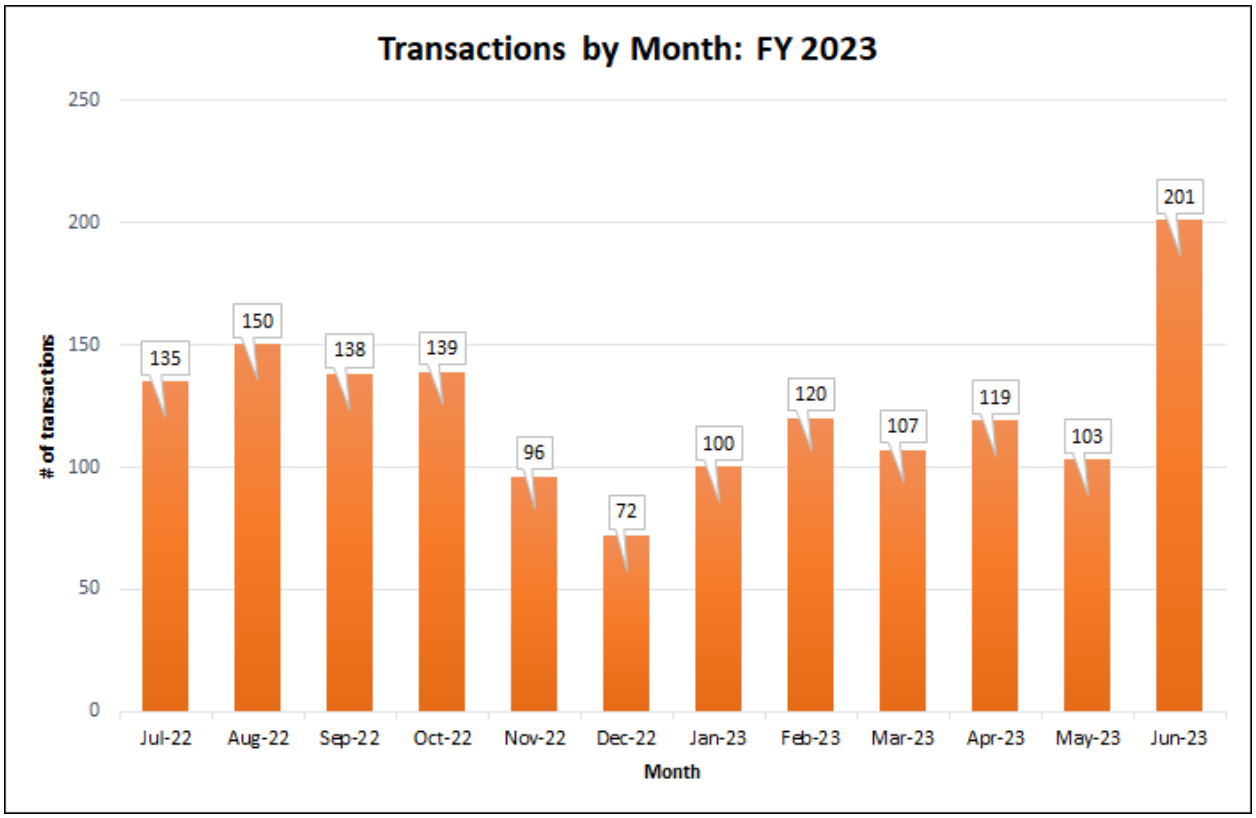

Instruction Circulation, Rare Books: FY 2023
Class Circulation
90
80
70
60
50
40
30
20
10
0
6
44
85
58
7
Atomic Energy
History of the Pacific Northwest
History of Science
McDonald
Pauling
Rare Book Collection

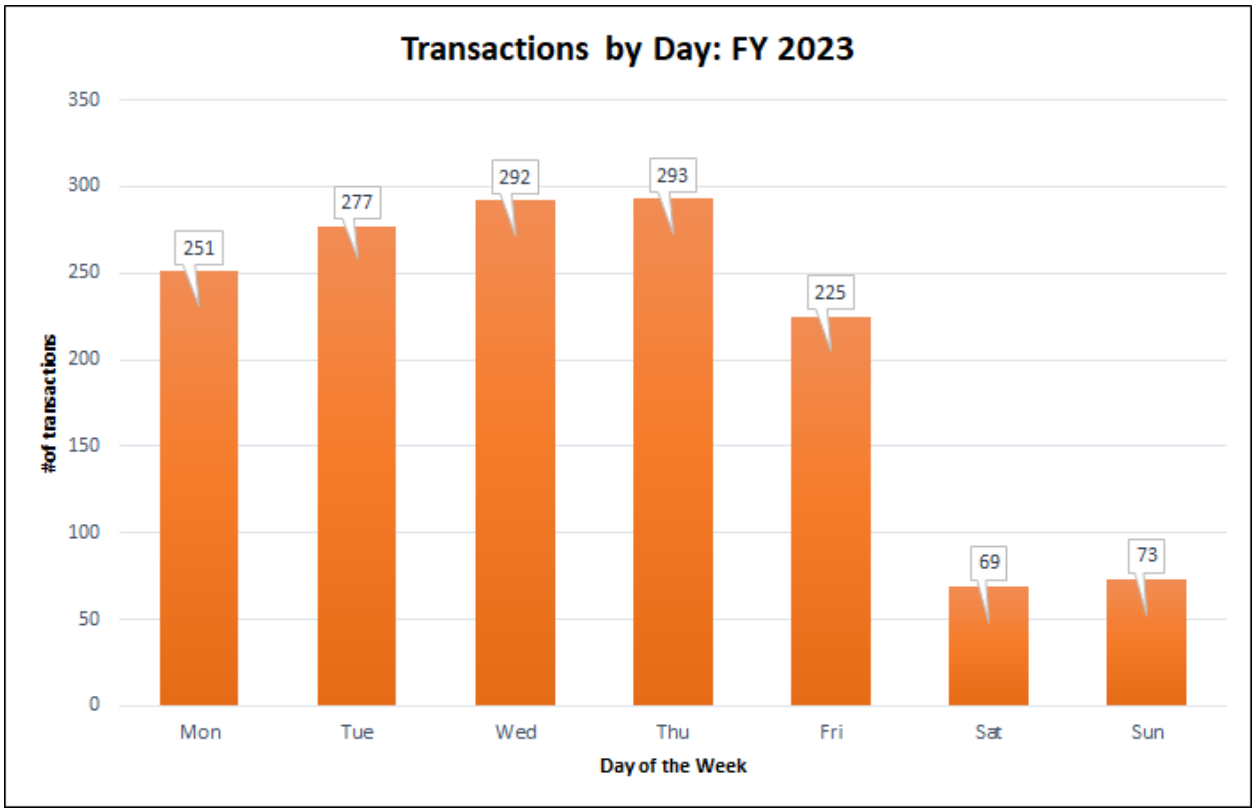

Instruction Circulation, Archival Materials: FY 2023
Total Circulation
40
35
30
25
20
15
10
5
0
37
12
10
9
6
6
5
4
4
4
Ava Helen and Linus Pauling Papers
Women's Center Records
Urban League of Portland Records
Fred Eckhardt Papers
OSU Memorabilia Collection
E.E. Wilson Photographic Collection
President's Commission on the Status of Women Records
Max Geier Color of Night Research Files
History of World War II Project Records
Facilities Services Records
Collection Title

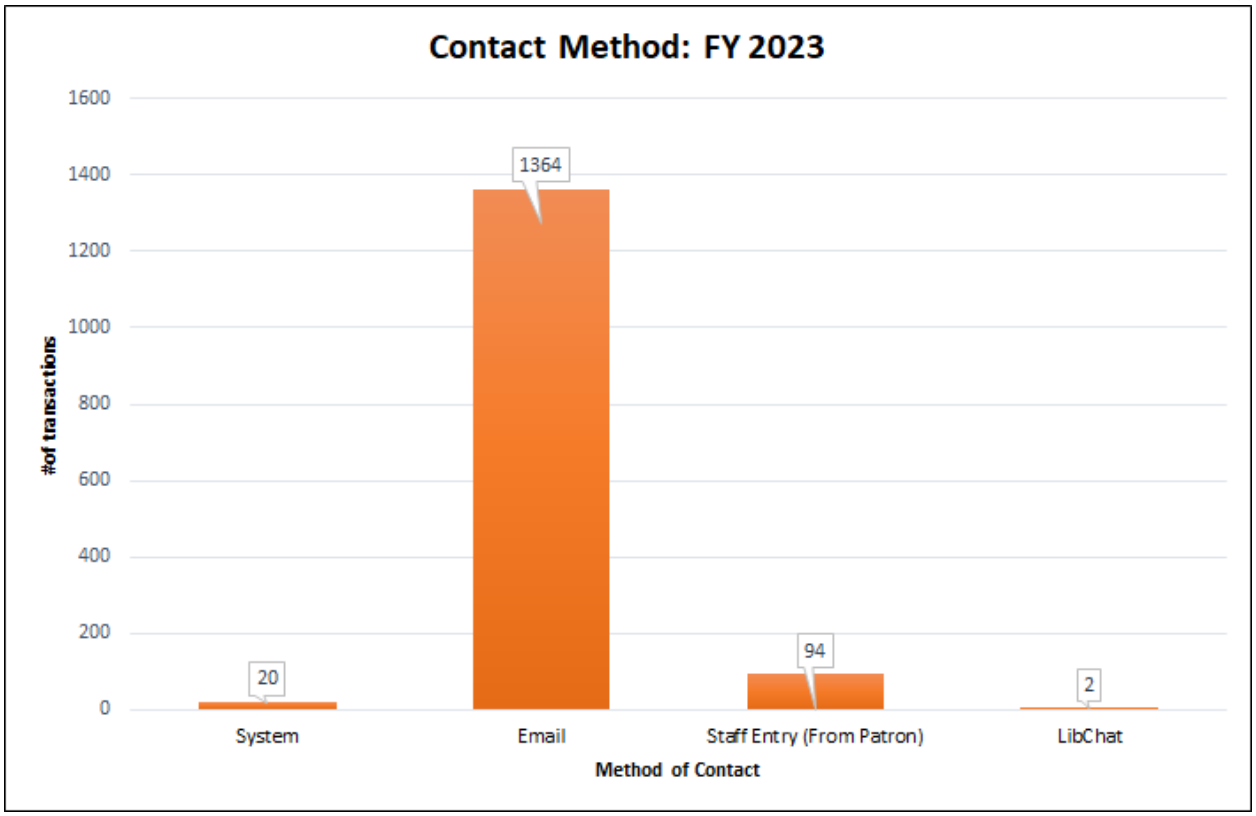

Circulation by Patron Type: FY 2023
300
250
200
150
100
50
0
Loans
24
1
57
125
35
245
18
43
Convenience Card
Doctoral
Masters
OSU Faculty/GTA
OSU Staff
SCARC User Only
Special Graduates
Undergrad.
Patron Group

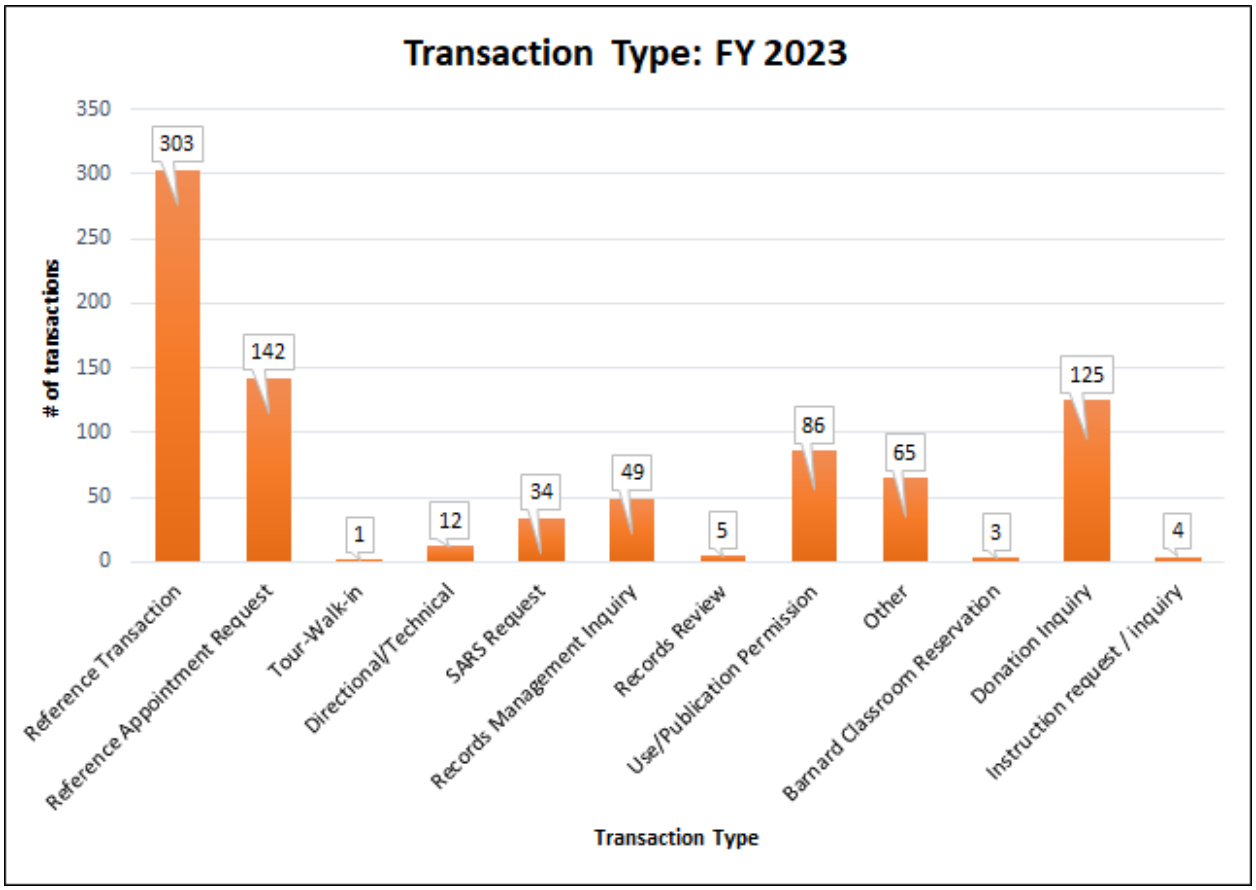
Appendix B: Remote research data tables (LibAnswers)

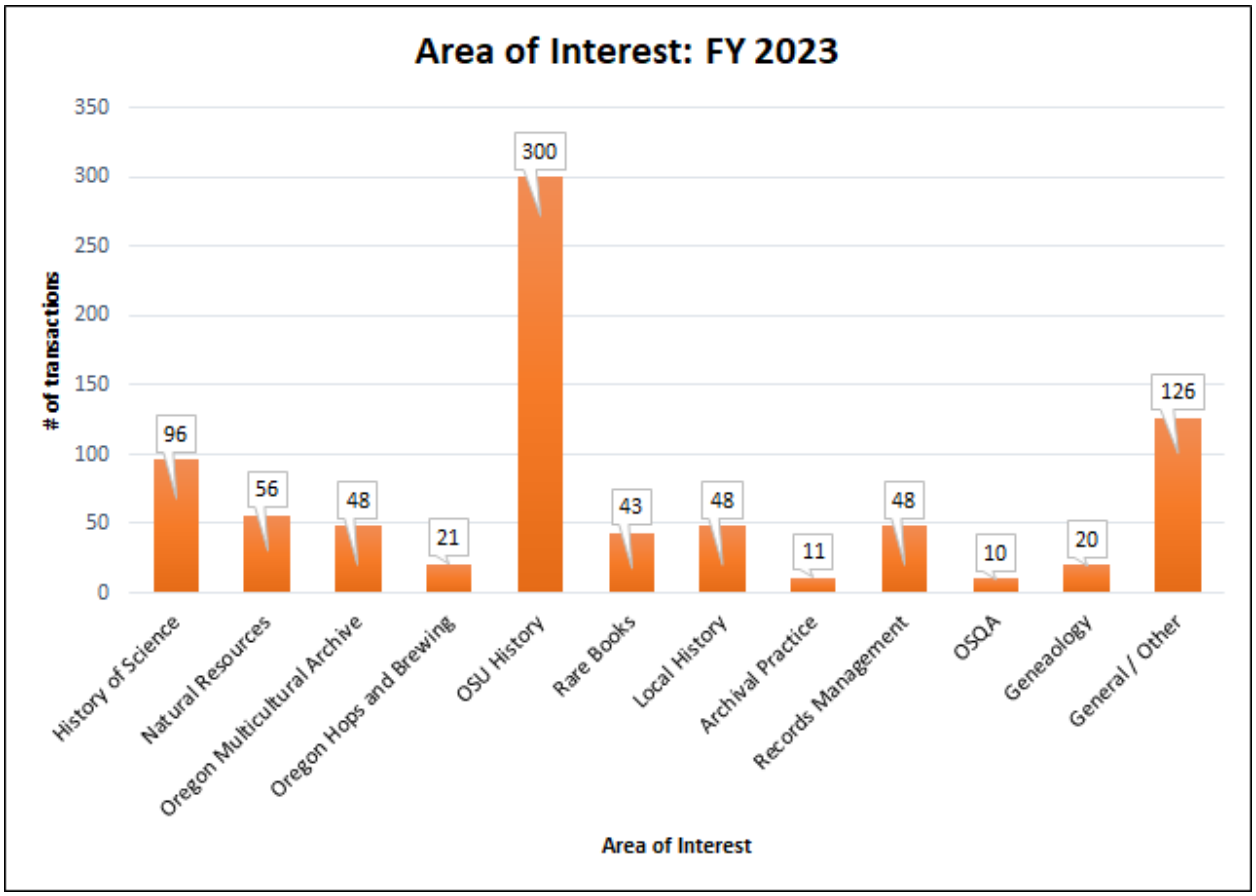
In total, SCARC's Public Services staff managed and/or responded to 832 reference transactions in LibAnswers in FY2023 - roughly 16 per week.

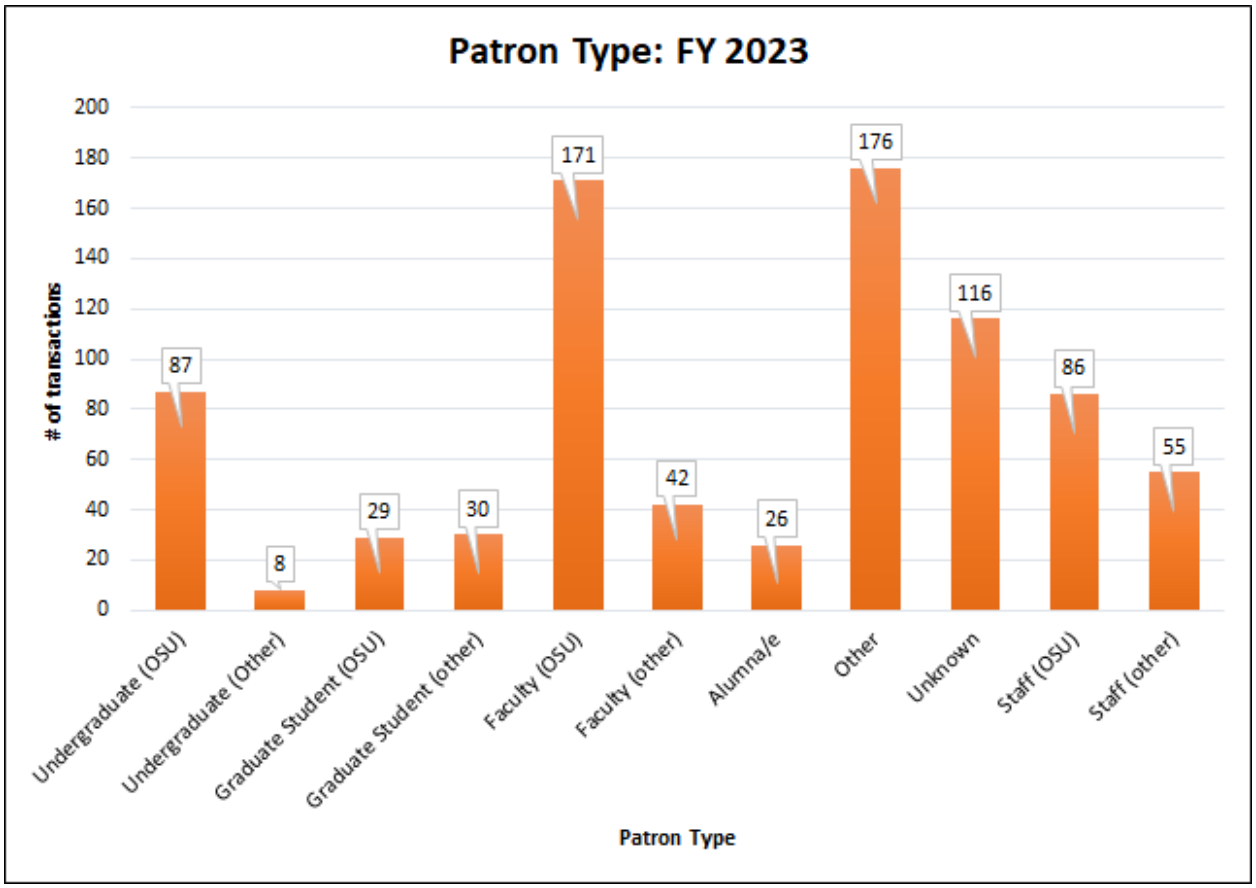


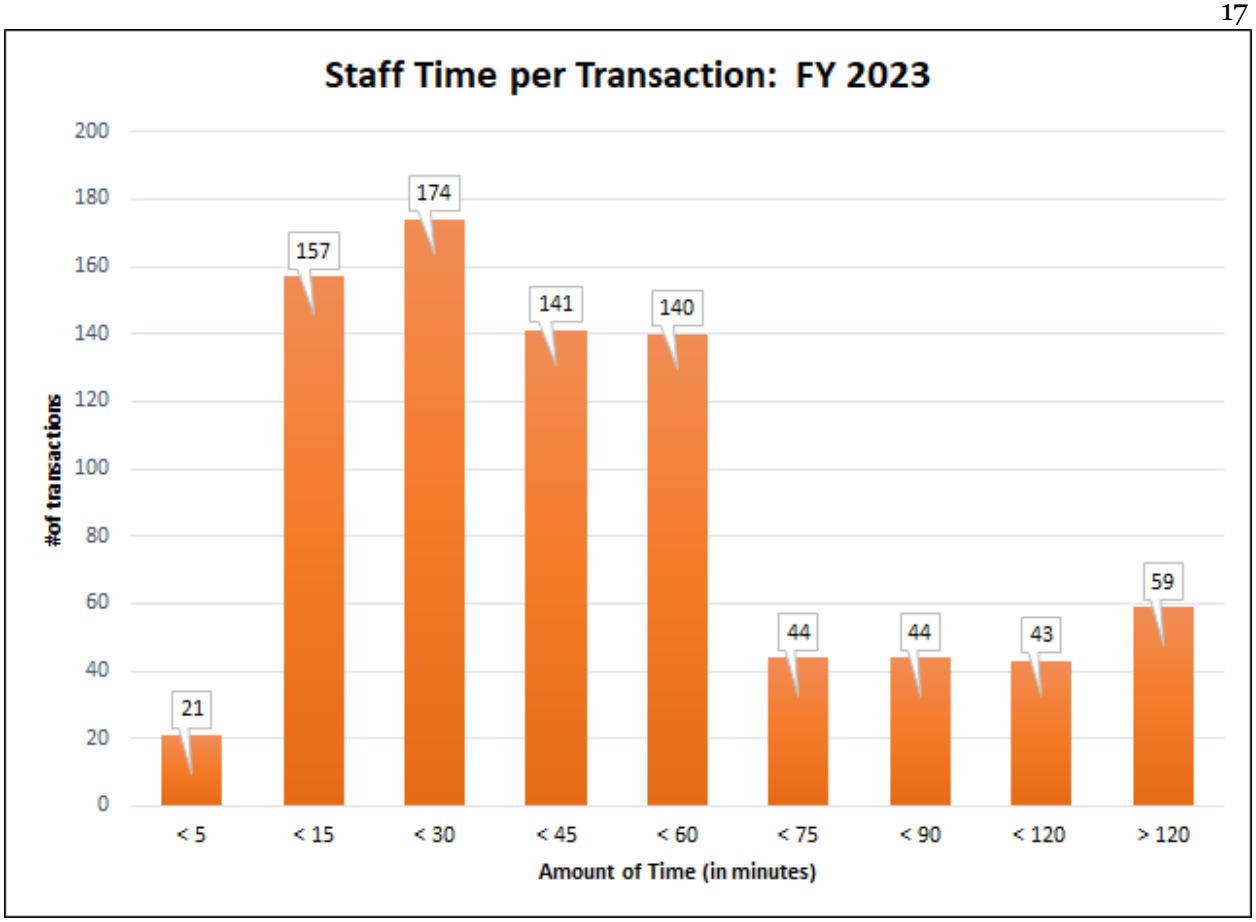


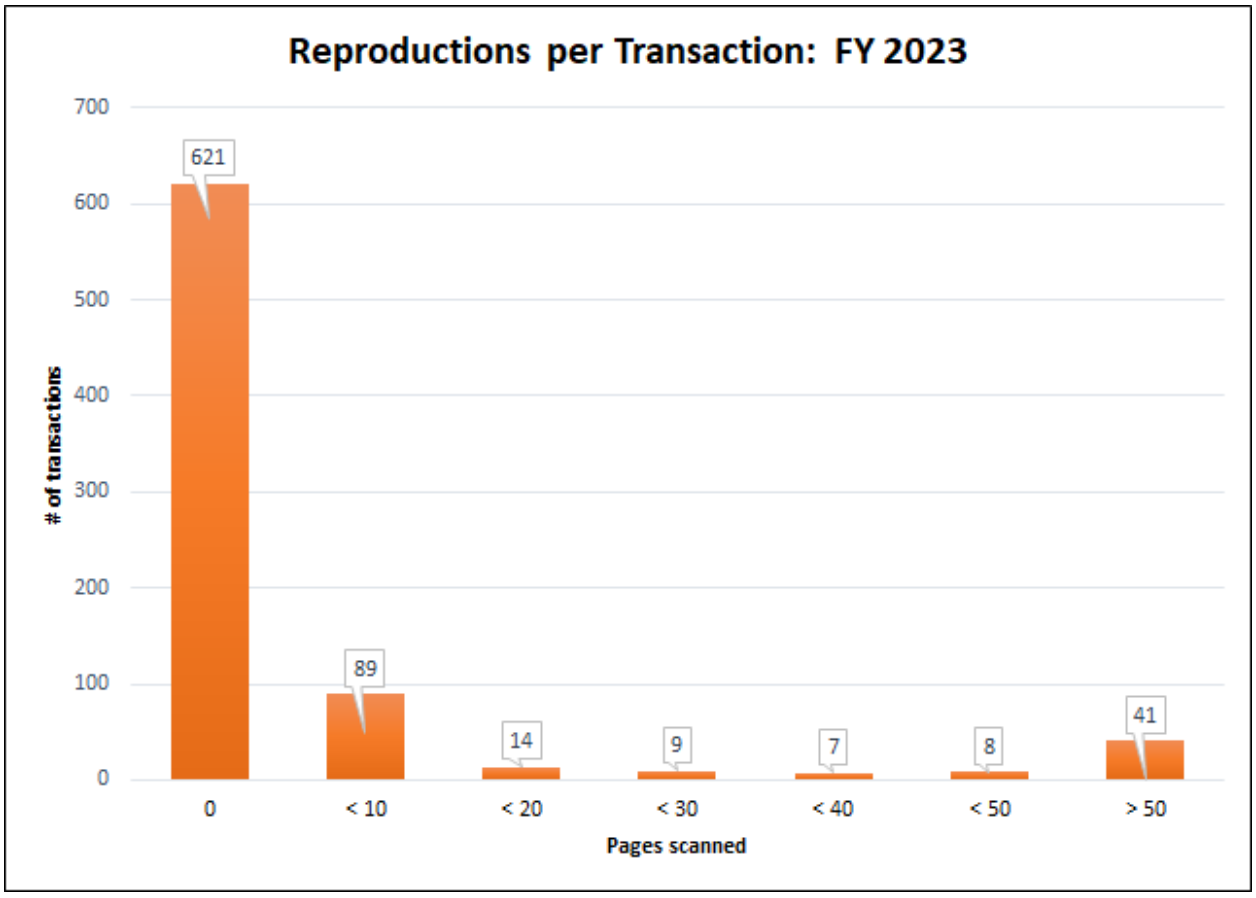

Contact Method: FY 2023
#of transactions
1600
1400
1200
1000
800
600
400
200
0
20
1364
94
2
System
Email
Staff Entry (From Patron)
LibChat
Method of Contact

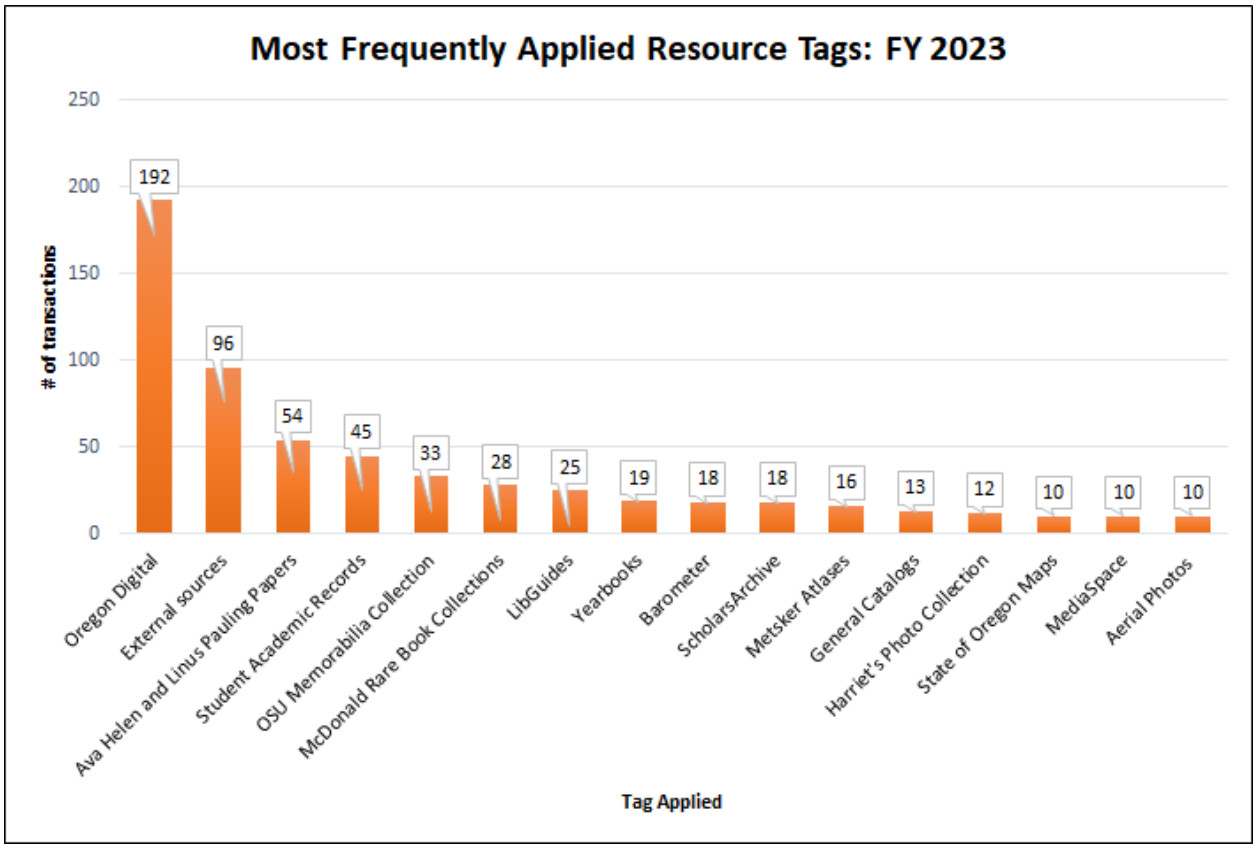

Transaction Type: FY 2023
# of transactions
350
300
250
200
150
100
50
0
303
142
1
12
34
49
5
86
65
3
125
4
Reference Transaction
Reference Appointment Request
Tour-Walk-in
Directional/Technical
SARS Request
Records Management Inquiry
Records Review
Use/Publication Permission
Other
Barnard Classroom Reservation
Donation Inquiry
Instruction request / inquiry
Transaction Type


Area of Interest: FY 2023
# of transactions
350
300
250
200
150
100
50
0
96
56
48
21
300
43
48
11
48
10
20
126
History of Science
Natural Resources
Oregon Multicultural Archive
Oregon Hops and Brewing
OSU History
Rare Books
Local History
Archival Practice
Records Management
OSQA
Geneaology
General / Other
Area of Interest


Patron Type: FY 2023
# of transactions
200
180
160
140
120
100
80
60
40
20
0
87
8
29
30
171
42
26
176
116
86
55
Undergraduate (OSU)
Undergraduate (Other)
Graduate Student (OSU)
Graduate Student (other)
Faculty (OSU)
Faculty (other)
Alumna/e
Other
Unknown
Staff (OSU)
Staff (other)
Patron Type


Staff Time per Transaction: FY 2023
#of transactions
200
180
160
140
120
100
80
60
40
20
0
21
157
174
141
140
44
44
43
59
< 5
< 15
< 30
< 45
< 60
< 75
< 90
< 120
> 120
Amount of Time (in minutes)


Reproductions per Transaction: FY 2023
# of transactions
700
600
500
400
300
200
100
0
621
89
14
9
7
8
41
0
< 10
< 20
< 30
< 40
< 50
> 50
Pages scanned


Most Frequently Applied Resource Tags: FY 2023
# of transactions
250
200
150
100
50
0
192
96
54
45
33
28
25
19
18
18
16
13
12
10
10
10
Oregon Digital
External sources
Ava Helen and Linus Pauling Papers
Student Academic Records
OSU Memorabilia Collection
McDonald Rare Book Collections
LibGuides
Yearbooks
Barometer
ScholarsArchive
Metsker Atlases
General Catalogs
Harriet's Photo Collection
State of Oregon Maps
MediaSpace
Aerial Photos
Tag Applied