Assessment in Action: Using Results to Improve the Archival Experience

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Evaluating Public Services in Special Collections by Tanya Zanish-Belcher

Good afternoon. I am Tanya Zanish-Belcher, Director of Special Collections & Archives at Wake Forest University and I will be speaking about the assessment of public services in Special Collections & Archives. While preparing this presentation, it struck me how little statistics and numbers can truly capture our day-to-day experiences. Working with donors, teaching a class, meeting with a faculty member—while they may represent a tick of 1 on the numerical scale, what transpires can be so much more deep and meaningful for us as individuals, for our patrons, for our programs.

However, numbers, statistics and surveys are tools, tools which can help us tell our story and share our value with others who may not understand the complexity and significance of what archivists do. This is why assessment should be so important to us. For me, public services are why archives exist—they are why we collect, why we process, why we create finding aids. Assessment and evaluation of our activities in this area fulfill several goals for special collections, for me, the following are primary:

Is Special Collections & Archives worth the investment of resources by the parent institution?

Are we teaching and sharing information and skills which impact our patrons and visitors? Are we improving their learning experience? Are we helping them find the value in our collections for their education?

Flat out, Are we making a difference?

Just to be clear, Wake Forest is not necessarily a leader in assessment; nor am I, but I simply wanted to share some of what we are doing. I hope each of you will take some time and think about how you can introduce or expand your own assessment work and make the numbers, statistics, and surveys work for you.

Z. Smith Reynolds Library

What started this obsession with Assessment? In our case, it really did come from the top. Our Dean decided we needed an Assessment Committee, with the chair being an Associate Dean and the members including the Directors from Access, Reference and Instruction, Resource Services, Special Collections and IT. Our goal was to create a "culture of assessment" through role modeling, communication, education, and setting attainable assessment goals. As an added impetus, Wake Forest also had recently purchased a subscription to Qualtrics, a survey system to which every faculty and staff member has access. We were determined to make assessment happen and met on a regular basis. Some of our goals:

1. Each committee member would set one assessment goal within their annual team goals and execute the assessment. The key word being "execute."

A recent assessment of Personal Research Sessions, coordinated by Reference and Instruction appears here:
http://cloud.lib.wfu.edu/blog/gazette/2015/05/07/what-our-users-are-saying-about-personal-research-sessions/

2. The committee would sponsor educational programs about assessment for the ZSR faculty and staff

3. We deployed LibQUAL+, a suite of services that libraries use to solicit, track, understand, and collect users' opinions of service quality. One of the struggles with LibQual for us as archivists, is ensuring we are included. Fortunately, I was able to include one specific question in regards to Access to rare and historical materials—we are still analyzing the results.

4. In addition to LibQual, our Director of Access Services also submitted a successful proposal to ACRL for their Assessment in Action program. The

initial results have uncovered interesting ways that the building helps or hinders student study.

While the focus of these surveys are on the entire library, it is still possible for me to utilize elements of the findings, and relate them to Special Collections as we plan a major renovation of the Special Collection public spaces. Assessment has also offered me the opportunity to work more closely with my colleagues in the Library, always a good thing!

Resources

User-based assessment is a rapidly growing area of research in archives. Researchers doing work in this area include Anne Bahde, Joan Cherry, Wendy Duff, Christian DuPont, Magia Krause, Doris Malkmus, Aprille McKay, Heather Smedberg, Helen Tibbo, and Beth Yakel. I want to make special note of Archival Metrics (http://archivalmetrics.org/), which is a collaborative project between the University of Michigan, the University of NC and University of Toronto, which provides a number of downloadable toolkits and a bibliography.

Three publications I would recommend for anyone interested in assessing instruction:

Past or Portal? Enhancing Undergraduate Learning through Special Collections and Archives. Edited by Eleanor Mitchell, Peggy Seiden, and Suzy Taraba. Published by the Association of College and Research Libraries, 2012.

*Using Primary Sources: Hands-on Instructional Exercises***.** Edited by Anne Bahde, Heather Smedberg and Mattie Taormina. Santa Barbara, California : Libraries Unlimited, an imprint of ABC-CLIO, LLC, 2014.
http://www.abc-clio.com/ABC-CLIOCorporate/product.aspx?pc=A4130P

Bahde and Smedberg have also published 2012's "Measuring the Magic: Assessment in the Special Collections and Archives Classroom" in *RBM: Journal of Rare Books, Manuscripts, and Cultural Heritage. September 21, 2012 RBM: A Journal of Rare Books, Manuscripts, and Cultural Heritage.* Vol. 13 no. 2 152-174.
http://ir.library.oregonstate.edu/xmlui/bitstream/handle/1957/43935/152.full.pdf?sequence=1

The most exciting development is the recent appointment of the SAA-ACRL/RBMS Task Force on the Development of Standardized Statistical Measures for the Public Services of Archival Repositories and Special Collections Libraries. The Task Force is "responsible for development of a new standard defining appropriate statistical measures and performance metrics" and is currently working on definitions related to users, visits, reference transactions, collection use, reproductions (includes ILL), events or activities, and website, with a report forthcoming in the next year.
http://www2.archivists.org/groups/saa-acrlrbms-joint-task-force-on-public-services-metrics

When assessment became a priority, my first thought was evaluating the users' experience in instruction, reference services and our online presence. Our short-term goal was to determine whether immediate changes were needed in any of our programming. For the future, my goal is to develop a complete and thorough assessment plan for all of the Department's public services.

And I don't want to discount basic counting! Certainly, we count (especially in a Department which had honestly, never counted anything before). For instruction, we keep track of the number of presentations/type of presentation (in-depth or introduction or topical), section numbers, and number of students. We count all of our visitors, whether they use our collections or not. Again, these are numbers, which when included in our quarterly report can help convince the Dean we are an active and involved Department. But how do we go deeper?

Assessing Instruction

> i. Lib100

We have made a real effort to focus our efforts on ZSR's Lib100, which is a for-credit class taught by Library Instruction Faculty. Their initial visit includes a very basic introduction to Special Collections & Archives: who we are, where we are, our collections. We began surveying the groups in 2014 when one of our instructors agreed to request (and **require**) online reflections (in addition to their traditional student evaluations):

- What did you think was the most interesting aspect of our visit to the Special Collections and Archives Reading Room?

- What about special collections/archives do you find confusing or are unsure of?
- How might someone doing research benefit from the use of materials in special collections and/or archives?

The comments were all thoughtful, but what surprised us the most was the amount of confusion over very basic information. And we thought we had done so well! We revised our presentation numerous times, specifically focusing on the areas where the surveys indicated confusion and also expanded our discussion in other areas. The latest round seem to show a better understanding of the information we are trying to share. However, the main challenge has been reminding the instructor to send the evaluation and we have found sending a reminder before the class visit is helpful. We will continue to collect this information to ensure our presentations remain consistent and easy to understand. For the future, we will develop new exercises to better connect the students with the possibilities in archives, and use the evaluations to assess how effective we are.

ii. Faculty

It is also important, from a pedagogical standpoint, to ask our faculty about their experiences. Our Special Collections Librarian conducted her first set of brief surveys with faculty she has worked with over this past semester. She utilized e-mail messages—again, the main challenge is obtaining a response.

Among the questions she asked:

Briefly describe your use of archives and manuscripts in your teaching this semester. (Please describe any assignments).

What were your teaching goals in using archives and manuscripts this term?

What help did you request from us? Please check all that apply.

      ____Lecturing the class on the use of primary sources (analog or digital)
      ____Class visit to see particular materials
      ____Class orientation in preparation for an archival research assignment
      ____Coordinating a primary source research project in the archives for your students

Please rate how well the following met your teaching needs this past term, on a scale of 1 to 5, where 1 is poor, and 5 is excellent. Indicate N/A if you have no opinion or did not access the service.

_____Reference staff expertise
_____Reference staff availability
_____Instructional space
_____Reading room
_____Finding aids
_____Website
_____Hours of operation
_____Online catalog

We also ask questions relating to how we can assist them better, how long they have utilized archives and manuscripts /rare books in their teaching, and additional information about their status and length of time at the university.

Based on the responses we have received thus far the faculty are pleased with our service and our collections (except our hours), but this remains an area where we need to do more on a consistent basis. We also need to do a better job of evaluating special projects where we have collaborated with faculty, especially focused writing projects and oral histories.

iii. Lib200 classes

Also on our list for evaluation are the Library's 200 classes which focus on research in the Humanities, Social Sciences and the Sciences. I will be co-teaching one of these classes this fall which will include presentations and discussion on locating primary sources, digital humanities, and the use of rare books in research. This will be an excellent opportunity to develop more structured evaluations of both individual presentations, activities, and the long-term impact of a class such as this on student learning. Magia Krause's article "Undergraduates in the Archives: Using an Assessment Rubric to Measure Learning" (*The American Archivist*, Vol. 73, No. 2 (Fall/Winter 2010), pp. 507-534): http://www.jstor.org/discover/10.2307/23290757?uid=3739776&uid=2134&uid=2&uid=70&uid=4&uid=3739256&sid=21106776463373

will be a resource I rely on as we decide what we want to assess—an increase in student understanding? Archival literacy? Do we need pre and post tests to determine these answers? There are many decisions to be made.

At this point, instruction assessment is just in the beginning stages and we plan to implement a more systematic method of collecting data and narratives and illustrating our impact more completely. However, the information we are collecting now, even if it is somewhat limited, has still been extremely helpful as we gauge how well we are doing and where we could do better.

Assessing Reference Services

For many of us, assessing our reference services is a top priority. Before describing how we handle our own, I thought I would briefly mention other programs being used by institutions in the U.S.

The most robust appears to be Aeon, which is being used by Harvard, the University of Kansas and Yale, among others. Its key features include complete reading room management, including online user registration and advance paging, online ordering for digital images and other reproductions, and software for e-mail reference request management. Most importantly, Aeon provides reporting and custom query tools to provide documentation for usage patterns and user communities. Another program is Desk Tracker by Compendium Library Services which is currently being used by over 100 subscribers. The system collects the type of question, contact, patron type, and users can also work with the company to develop specialized modules. Each of these systems has differing capabilities, and archivists must conduct research on what is available and make a choice of what works best, based on your organization's culture and needs.

At Wake Forest, we currently use the LibStats Knowledge Base to collect information about our in-house users. LibStats is an open source web-based Google app for collecting library statistics. Our online requests (using a form) are automatically added to the database. LibStats can produce any number of reports, ranging by patron type, the date of the question, who handled, or which collection was used. Moving from an Access database where everything was entered by hand, LibStats is a dream.

In addition, we collect hard copy out slips and also document our other services (reproduction and ILL). We currently discussing how we can use bar coding in the future to see what collections are being used most?

This summer, we will be upgrading and combine our reference service with Reference and Instruction as we all upgrade to LibAnswers (by Springshare). Special Collections will have its own queue within the system and we hope this will help track conversations, reduce user omissions, and be able to report statistics in more usable format. We have also been discussing the use of LibShare Analytics as we explore more directly evaluating the experiences of our users through individual evaluations and focus groups.

Assessing our Online Services

Lastly, I would like to discuss how we are currently assessing our online presence, including our web site, social media and digital collections. This is still at a very preliminary stage, although that is not stopping us from collecting information.

ZSR IT sends me monthly statistics relating to the Special Collections web site. Using Google Analytics, the information includes pages views for the main page, digital collections and blog posts, in addition to a percentage of the total and bounce rates. There is also a visual graphic showing daily results. While I have not determined long range plans for this statistical information, it does provide a visual snapshot of what web pages our users are visiting.

This kind of information will prove valuable as we continue with page revisions and a major reconfiguration of our digital collections page and institutional repository. These will require more in-depth evaluation of our users, and so we hope to implement a pop-up survey with very basic questions as a way for us to gather initial feedback. Our initial focus will be on our web site structure: Navigation Ease, How easy is content to understand? We also hope to develop in-depth surveys and focus groups focusing on the navigation of our finding aids and digital collections. Our online users are very important to us, and we need to do a much better job of tailoring our offerings in an intuitive and easy to use site.

Conclusions

So, in conclusion, why is assessment important? Special Collections is a significant expense of resources—collections and staff, and it is part of the archivist's responsibility to make sure upper level administrators do not forget your role in the success of the institution. Share your numbers and your stories through blog posts, reports, and other mechanisms. Constantly. Consistently. Annoyingly.

Allow the experiences of your users to drive your programming—what works, what doesn't? What inspires students? What bores them? What makes them curious?

While it important to plan and examine how to use products and resources, don't wait to collect important information NOW—while there are tools available, you don't necessarily need them to start.

It is important to integrate assessment thinking into all aspects of archival programming—whatever you do, some sort of evaluation should occur. This is a significant time commitment, but the information you collect can determine the ultimate success of your program and institution.