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Opportunities With Archives West:

How a Small Academic Archive Benefits From Membership

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Like many smaller academic organizations, Southern Oregon University's Hannon Library Special Collections and University Archives (SPEC) operates with a limited budget and minimal staffing. Membership to Archives West provides Hannon Library with a framework to enhance discovery, improve collection management, and promote growth and sustainability. The additional resources provided by Archives West and the Orbis Cascade Alliance allow SPEC to increase capacity and improve services to students and community researchers. The underlying framework consists of training sessions, best practices documents, affordable access to ArchivesSpace, and system support. While improved discoverability is often the primary motivator, libraries should not overlook the added value of improved workflows concerning collection management. Overall, the support provided by Archives West enables smaller archives to streamline their management activities while enhancing discoverability for the current users and reaching new users. Participation in Archives West also offers greater visibility, which facilitates the library's outreach and advocacy efforts. The benefits of membership in Archives West are well worth the efforts inherent in implementing new software and altering workflows.

Background

Hannon Library's SPEC currently contains 49 manuscript collections and over 70 university record collections. A primary subject search is available in the library's catalog for only eight of these collections. To facilitate access to collection finding aids, Hannon Library maintains a website for Special Collections and University Archives (<https://hanlib.sou.edu/speccoll/>). The site lists most of the manuscript and record collections with a brief description and a link to the collection's specific finding aid. The finding aids are in MS Word and keyword searchable. Each collection requires a search of its finding aid to explore the contents of the collection. The search process requires researchers to open and keyword search individual finding aids to locate materials related to their topic of inquiry. Researchers are unable to conduct a search across the various collections. This creates barriers to efficient discovery and can be frustrating, especially to novice researchers familiar with search functions available through the library's catalog or Google.

Hannon Library began seriously exploring options to improve discoverability while remaining within the library's constraints concerning budget dollars and staffing levels in early 2017. The idea of joining Archives West (Northwest Archives) floated around Han-



non Library for several years. While most staff agreed that participation in Archives West was a good idea, they expressed concerns about the library's limited resources. For many, the staff time required to make the transition outweighed the benefits of joining. SPEC staff's latest proposal to join Archives West emphasized the abundance of support provided by the Alliance in the form of training sessions and related documentation. While this support does not eliminate the staff time required for the transition, it does provide a community of professionals and other resources designed to support a 'lone arranger' and ease the implementation process as much as possible.

The screenshot shows the Archives West website interface. At the top, there is a navigation bar with 'ARCHIVES WEST' and the 'ORBIS CASCADE ALLIANCE' logo. A search bar is visible on the right with a 'DIGITAL OBJECTS ONLY' checkbox. The main content area displays search results for 'Southern Oregon University, Hannon Library'. On the left, there are filters for 'REPOSITORY', 'PLACES', 'NAMES', 'SUBJECTS', and 'MATERIAL TYPES'. The main list of results includes:

- Douglas D. Martin papers**: Summary: Douglas D. Martin was a long-time member of the Western History Association and a recognized scholar of Native American/white relations. Dr. Martin published widely. Dr. Martin's areas of specialty included the socio-cultural history of the United States, the history and literature of the American frontier, American environmental history, and Indian-White relations in American history. This special collection contains 16 boxes of manuscript materials relating mostly to Native Americans in the Northwest. Box 15 in the collection contains various small objects, such as arrowheads. While most of the donation consisted of monographs that were added to the Library's holdings, the collection also included manuscript materials described within this document.
- Francis G. Swedenburg papers**: Summary: Francis Swedenburg was one of the many Swedish immigrants to settle in Oregon. He began his medical career in March 1907 at the Ashland Sanitarium, joining the founder of the sanitarium, Dr. Joseph Herndon. He became a prominent member of his field. The collection consists of 34 journals spanning 1890-1937, a doctor's call book, a record book, and twelve family photographs, clippings, financial documents, and other miscellanea.
- Ashland Creamery records**: Summary: Ashland Creamery Company Articles of Incorporation, 1896. Stock certificates with valuations of 5, 10, 15, 20, or 30 shares at \$10 per share, 1897.
- Margery Bailey scrapbook and diary**: Summary: A scrapbook compiled by Margery Bailey during her undergraduate years (1910-1914) at Stanford University, and Bailey's 1963 diary, kept during the last months of her life.
- Rogue River National Forest records**: Summary: Jeffery LaLande worked as an independent historian outside of his Forest Service career, and this collection resulted from his independent research. These papers include correspondence with researchers on various topics; files from essays, articles, book reviews, and books he has written; and his peer reviews, requested by various editors, of manuscripts submitted for publication.

Management of a standalone environment exceeds Hannon Library's capabilities. The Orbis Cascade Alliance eliminates the need to go it alone. The Alliance provides significant technical and administrative support, including best practices and standardization. Archives West developed their program with the intention of providing support to the consortia members. As noted in a 2013 article, "the program supports a suite of collection management and access services that allow participating institutions to focus local staff and resources on other functions. Members also find an active community of colleagues to consult and

play a substantial role in governing and directing the program” (Allison-Bunnell, Morton-Keithley, & Knight, 2013). At the consortium level, Archives West develops policies and procedures regarding the management of record and manuscript collections. Each individual archive can build on or adapt the broad, consortia-level policies and procedures to fit their specific needs. A small archive with a lone arranger, like SOU, does not need to reinvent the wheel. They can merely adjust the existing resources to meet their needs.

The screenshot shows the Archives West website interface. At the top, there is a navigation bar with 'ARCHIVES WEST' and 'UNIVERSITY OF CALIFORNIA' logos, and links for 'ABOUT', 'CONTACT', and 'HELP'. Below this is a search bar with the text 'Search' and a sub-label 'DIGITAL OBJECTS ONLY'. The main content area is titled 'Oregon Shakespearean Festival publications, 1935-present' with a PDF icon. On the left, there is a 'Table of Contents' sidebar with links for 'Overview of the Collection', 'Historical Note', 'Content Description', 'Use of the Collection', 'Administrative Information', and 'Names and Subjects'. The main content area provides an 'Overview of the Collection' with the following details:

- Com:** Otness, Harold M.
- Title:** Oregon Shakespearean Festival publications
- Dates:** 1935-present (Inclusive)
- Quantity:** 10 linear feet, (19 boxes)
- Collection Number:** MSS.036
- Summary:** The collection consists of miscellanea relating to the Oregon Shakespeare Festival, including production information, membership, and public relations materials, playbills, clippings, articles, and programs.
- Repository:** Southern Oregon University, Hannon Library
Hannon Library, Special Collections
1250 Siskiyou Blvd
Ashland, OR
97520
Telephone: 541-552-6841
libspec@sou.edu
- Access Restrictions:** The collection is open for research.
- Languages:** English

Below the overview, there are sections for 'Historical Note', 'Content Description', 'Use of the Collection', 'Administrative Information', and 'Names and Subjects', each with a 'Return to Top' link. The 'Names and Subjects' section lists:

- Subject Terms:** Theaters
- Other Creators:**
 - Personal Names:** Otness, Harold M. (com)
 - Corporate Names:** Oregon Shakespeare Festival (cre)

Enhance Discovery

Recently, Hannon Library has examined processes for improving the discovery of materials to support students’ academic research. Opening the finding aid for each SPEC collection and performing a keyword search requires a high level of perseverance. Novice researchers and undergraduate students find the process frustrating and may abandon their search. The Archives West site allows researchers to search the contents of all collections through search options similar to the library’s catalog. A contents search enables researchers to locate materials regardless of whether the collection’s main subject or description appears related to their research needs. For example, the Oregon Shakespeare Festival manuscript collection contains a few items related to the local weather that may be of interest to a researcher of regional climate change. Another collection that focuses on forestry includes poetry authored by the forest rangers which may interest students studying creative writing. The ability to search across the contents of all collections improves the likelihood that researchers will efficiently locate materials relevant to their needs (O’English, 2011). Mark O’English further noted that researchers who locate finding aids through search fields similar to Archives West



spend significantly more time with the document as compared to accessing a finding aid through the library catalog (O'English, 2011). Usability testing by the Alliance notes that searchers "seem to prefer aggregator sites that offer access to as many materials as possible; they are less enthusiastic about sites that offer only selected materials, or materials focused on a particular subject" ("Orbis Cascade Alliance Northwest Digital Archives Digital Program Planning," n.d.). Participation in Archives West will improve the discoverability of our collections and assist student researchers, facilitating student success and related employment skills.

Improve Collection Management

Hannon Library and SPEC staff identified improvements in collection management as an essential benefit of joining Archives West. Participation in Archives West includes the option to utilize the ArchivesSpace collection management system. The opportunity to move collection management from a series of Excel and Word files to a system as robust as ArchivesSpace should not be underestimated. Permanent staffing of SPEC consists of less than .5 FTE. SPEC also employs five student workers and the occasional intern. SPEC's documentation concerning accessioning, processing, and donor information required multiple Excel sheets and Word files. SPEC also needed overarching documentation designed to track revisions, notes on future processing, prioritization, and deaccessions. ArchivesSpace centralizes these functions and adds efficiencies to the daily workflows. For example, staff and students no longer need to consult multiple documents to gather information concerning a collection. It also reduces the likelihood that information will be recorded in the wrong document or not at all.

Participation in Archives West further streamlines workflows such as entering and updating donor information. When a person donates multiple collections, the donor's information will be attached to each accession and collection. The automation alleviates the need for SPEC staff to locate, update, and reenter information in multiple places. In addition, the descriptive standards emphasized by Archives West comply with DPLA standards far better than our legacy finding aids. Use of these standards also improves SPEC's ability to coordinate with digital projects at Hannon Library. Materials selected for digitization and described according to Archives West standards will require less remediation by SPEC's staff. Reducing remediation creates workflow efficiencies for the digitizing team.

Promote Growth and Sustainability

The streamlined workflows gained through participation in Archives West and use of ArchivesSpace allow SPEC staff the time to develop and solidify plans for long-term growth and sustainability. For Hannon Library, long-term sustainability includes addressing a growing collection that will require added physical space and preservation of the AV materials already in SPEC. Opportunities for growth include the incorporation of born-digital materials and the technology, skills, and space needed to sustain them. Each of these activities requires staff time to identify the essential resources and to build a network of key supporters crucial to sustaining SPEC well into the future.



Efficiencies in collection management workflows enable SPEC staff to expand their engagement in advocacy activities. The ability to build and strengthen relationships with donors, supporters, upper management, and other stakeholders is key to SPEC's growth and long-term viability. Staff time spent on inefficient processes can now be directed toward increasing relationship-building activities. Currently, SPEC uses several communication tools to reach out to various stakeholders, such as newsletters, social media, and our web page. Streamlined workflows also allow staff members the time and opportunity to assess these activities. Are these communications reaching the intended audience and are they effective? Can SPEC better align these activities with their goals? For example, SPEC currently employs social media and the web page to promote discovery and awareness of our services and collections to potential researchers. Are these activities successful? How might they be improved? Additional time created through improved workflows also enables SPEC staff to expand the current outreach activities and explore new avenues. Identifying the most effective actions assists SPEC in improving communication and ultimately, the ability to build relationships and advocate for its long-term growth and sustainability.

Aside from improved workflows, the Archives West website facilitates promotion of the member archives. The Archives West site is professional, user-friendly, and aesthetically pleasing. As such, it provides an excellent tool for SPEC to employ when approaching potential donors and supporters. Donors want their materials to have a full and accurate description while being easily discoverable. The opportunity to view the Archives West website and explore other collections from SPEC as a demonstration of how their collection may appear is a critical factor in the donor's decision. The site also works as a showcase for SPEC and its collections. Presentations of the Archives West website allow potential supporters to learn about SPEC and its place in the larger archival community. The website enables SPEC to effectively demonstrate its current participation level in conjunction with short-term and long-term goals. The Archives West website is well designed for these types of presentations.

Conclusion

SPEC benefits from the support that membership in Archives West provides in a variety of ways. Archives West enables SPEC to expand the discoverability, collection management, and promotion of our services beyond anything we could accomplish alone. By design, Archives West transfers "some functions and services from local staff to the network level" (Allison-Bunnell et al., 2013). The opportunity to expand SPEC's capabilities while maintaining the current staffing levels was essential in our decision to join. Archives West provides the framework which improves the workflow efficiency of our small archive today and allows staff to work toward our vision of the future SPEC. A fundamental part of these plans includes developing a broad base of support across all stakeholder groups to facilitate SPEC's continued growth. In leveraging our membership in Archives West, SPEC can engage a robust community to build support for expanded services and increased staffing.

Our initial experiences with Archives West were overwhelmingly positive. The training sessions have been informative and practical. The Alliance performed the initial set up of ArchivesSpace. Decisions regarding any customizations are ongoing and will be decided collaboratively within Hannon Library. SPEC is currently transitioning to ArchivesSpace.



As expected, transferring our legacy records, particularly description records, requires substantial time and effort. The decision to join Archives West has already resulted in a sizable monetary donation to facilitate the transition, as well as the donation of an extensive collection of papers. Resource records will become available in Archives West during Fall term 2019. Hannon Library looks forward to completing our transition and taking full advantage of all the opportunities membership in Archives West provides. 

References

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