

Remote Users in Our Midst: Insights from the Archival Metrics Project

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Are there any differences between in-person and remote users of archives? This paper addresses this question through the development and testing of two survey instruments intended to help archivists conduct user evaluations of their online resources. The surveys are part of a larger toolkit developed by the Archival Metrics project consisting of five assessment instruments to help archivists evaluate the services and resources they provide to researchers. This paper focuses on the two sampling methods developed by the Archival Metrics team to elicit responses to the online surveys and the resulting differences between on-site researchers and online users.

Introduction

The Archival Metrics Project (<http://archivalmetrics.org>) is committed to fostering a “culture of assessment” in archives and special collections libraries in order for repositories to gain feedback about their resources from users and to assess the services they provide. The Project Team has developed and tested five survey instruments designed for college and university repositories. The questionnaires are currently available in the online toolkit. They evaluate (1) the in-person research experience, (2) students’ assessment of an orientation session, (3) the repository’s support for instructors’ using archives in their teaching, (4) online finding aids, and (5) the repository’s website. The focus of this paper is on the development and testing of the latter two questionnaires designed specifically for evaluating online resources.

The Online Finding Aids Survey was designed to capture users' evaluations of their ability to search, browse, navigate, and find information in Web-based archival access tools. The Website Survey asks similar questions but focuses more on usability features, the ability to accomplish certain tasks online, and features desired by users. The surveys were pilot-tested by a total of six repositories providing us with data to assess the quality of the questions and the methods employed to increase response rates. Preliminary results from these surveys suggest that our sampling strategy had a significant impact on the data, identifying two distinct user populations who had contacted the archives or special collections for assistance.

Reading Room Visitors vs. Email Reference Requestors

In developing these questionnaires, the Archival Metrics Team struggled with the logistics of administering an online survey. Static links and pop-up windows on repository websites inviting visitors to take a survey were not desired because of the low response rate associated with this method and the response bias in a self-selected sample [1]. In fact, we tested this method with one site and received a very low response rate. Therefore, we developed two other methods of sampling users. In the first method (Retrospective Reading Room Visitors), we sent invitations to take the survey to the fifty most recent reading room visitors of a repository. This insured a population of users familiar with the repository, its services and resources. One drawback, however, is that these researchers may not have used the online finding aids or visited the website recently enough to adequately assess them. Overall, this method produced a response rate of 43%.

The second method we employed (Prospective Email Reference Requests) involved sending rolling invitations to individuals who had recently contacted the repository with an email reference request. This proved to be a slow method of building a sample of respondents, but it was effective in producing a better response rate of 54%. These diverse sampling methods yielded an unanticipated finding in the testing of our questionnaires. When comparing the responses of both data sets, distinct differences between these two user groups are evident.

Online Finding Aids Survey

There were 181 responses from the four archives and special collections that tested this survey. The results of our testing reveal striking differences between the two populations in their reasons for using the access tools, how researchers found out about the resources, their frequency of using the finding aids, and their institutional affiliation. For example, email reference requestors were more likely to pursue family history projects. This was evident in the combined data from all four of the test sites where 26 email requestors cited family history project as their reason for using the online finding aids compared to only seven in-person visitors.

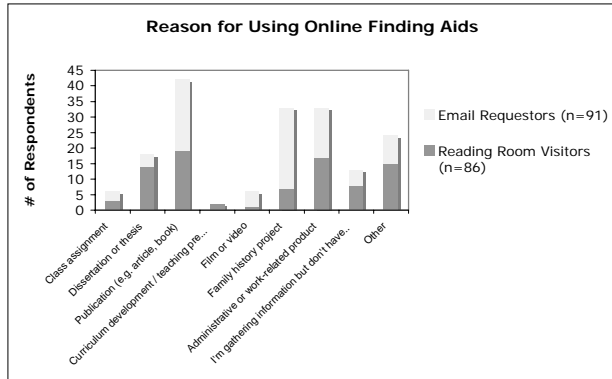


Figure 1. Respondents' Reasons for Using Online Finding Aids

Email requestors most often found out about the online finding aids through a search engine while reading room visitors already knew about them or selected the “other” answer option indicating a repository staff member. In the combined data for this questionnaire, half of the 40 email requestors came to the online finding aids via a search engine.

Email requestors also tended to be first-time users of the online finding aids. In the combined data, over half (58% n= 40) of this user group were first time users while 35% (n=51) of the reading room visitors were using the online finding aids for the first time. Not only did email requestors tend to be first-time users of the online resources, they also were highly unlikely to have visited the repository in person. In the combined data, 80% (n=39) of the email requestors had never visited the repository. This was the most significant difference between the user groups and suggests that individuals who email repositories with reference requests tend not to go for an in-person visit. Thus, reference staff need to provide all assistance virtually to these users. In the one test site that administered both sampling methods (n=25), the email requestors had more difficulty accomplishing online tasks. For example, eight of the 15 email requestors claimed they did not find everything they were looking for in the online finding aids while almost all of the reading room visitors (8 of 10) claimed they had. In addition, the email requestors rated the ease of accomplishing tasks online much lower on a scale of 1-5 (Table 1). As a result of these findings, the reference archivist administering the questionnaire concluded that these remote users need “personal intervention to teach them how to use archives.”

Table 1. Mean ratings for ease of accomplishing tasks in Online Finding Aids Survey.

	Reading Room (n=10)	Email Requestors (n=15)
Locate information by searching	4.30	3.70
Locate information by browsing	3.80	3.61
Determine the structure of the site and how to navigate it	4.11	3.43

Website Survey

In total, there were 78 responses from two archives and special collections. We saw similar differences between reading room visitor and email reference requestor populations in testing the Website Survey. Although this questionnaire was tested at only two sites, the majority of its questions were similar to the ones on the Online Finding Aids and other Archival Metrics questionnaires. The email reference requestors taking the Website survey also tended to be first-time visitors. The majority (76%) of these users (n=28) had visited the repository’s website for the first time. Slightly over half of the email reference requestors (14 of 26) found the website via a search engine while only 25% of the reading room visitors did (8 of 33). Email requestors also had trouble finding everything they were looking for on the website. Over half (16 of 26) were unsuccessful as opposed to 33% (n=31) of the reading room visitors. The biggest difference between these two populations reflects the same phenomenon evident in the Online Finding Aids Survey. While obviously all of the reading room visitors had been to the repository in person, only two of the twenty-five email requestors had made an in-person visit.

Conclusions

In testing two of the Archival Metrics questionnaires aimed at assessing online resources, we discovered some fundamental differences between two populations of researchers: reading room visitors and email reference requestors. While the former group consists of researchers familiar with a repository’s resources through on-site visits, remote online users are often stumbling upon these materials via search engines and are reluctant to visit the archives in person. As Amanda Hill (2004) recommended in her article about reaching out to “invisible researchers,” these remote researchers are valuable and their needs deserve attention [2]. The questionnaires developed by the Archival Metrics team can assist repositories in identifying the remote users of their resources, with the goal of better serving all users.

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