

Reference and Access for Archives and Manuscripts

By Cheryl Oestreicher. Chicago: Society of American Archivists, 2020.
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Reference services are vital to archival operations and should focus on providing the best access and services while keeping materials safe. This is a central theme of *Reference and Access for Archives and Manuscripts* by Cheryl Oestreicher, the fourth volume in the Society of American Archivists' (SAA) Archival Fundamentals Series III. Edited by Peter J. Wosh, the series in its entirety aims to provide crucial and straightforward information about each division of archival work. This volume provides a comprehensive overview of reference services and how they fit within the larger scheme of archival operations.¹

The author has a distinguished career in the archival profession, serving as an associate professor and director of special collections at Boise State University's Albertsons Library. Oestreicher received her master of library and information science degree from Saint Catherine/Dominican University in 2004 and her PhD in modern history and literature from Drew University in 2011. With a strong background that includes teaching, outreach, and editing the journal *Provenance*, Oestreicher received the Mark A. Greene Emerging Leader Award from SAA in 2015.² Her experience, as well as her dedication to staying abreast of archival trends, makes her an ideal author for this volume.

The book is prefaced by an introduction and divided into thirteen chapters that cover the topics of reference skills and knowledge, users, access, ethics, privacy, legalities, policies, outreach, and assessments. Each chapter includes illustrations of concepts and is broken into smaller sections with headings that make topics quickly accessible. This format works well and allows the reader to peruse topics out of order. The appendixes provide examples of documents that reference staff can adapt or learn from for their organizations, including reference request forms, patron registration forms, reproduction and terms of use forms, policies and procedures, information on where to find reference manual examples from other institutions, and website content examples. The extensive bibliography can further serve as a list for additional reading.

The introduction provides the historical background and basic tenants of archival work, as well as where reference services fit in with other archival departments and activities. Archives "enable citizens' rights to information in a democratic society, empower people to contribute to the historical record, and promote unlimited possibilities for research and advancing knowledge" (p. 1). Archives change and grow with the times and provide services that are central to

advancing knowledge in our society. Today, information has become increasingly accessible with online catalogs and finding aids, as well as digital collections.

Chapter 1, "Contextualizing Reference within an Archives Program," details how reference services fit into the larger picture of organizational operations. For archives, "Access is the outcome of all functions and activities: selection, acquisition, appraisal, arrangement, description, preservation, reference, outreach, and advocacy" (p. 13). Mission statements and strategic plans give an archival program direction. Access and reference policies must then fit within the organization's overall mission. Not only must those responsible for arrangement and description work with reference archivists to provide access to the public, but reference archivists must work with those responsible for preservation and security to ensure that documents are kept in the best condition while still being accessible.³ As with any successful organization, all departments must work together.

Chapter 2, "Reference Skills and Knowledge," provides an overview of necessary skills and knowledge for reference archivists. Possessing computer, research, and communications skills, as well as an understanding of applicable laws and best practices for reference and archival standards, is important for successful reference archivists. Subject expertise, technical abilities, and collections knowledge may be valuable, but having good communications skills that provide effective and pleasant experiences for researchers is also key. Continued training, whether in-house or through external classes, helps to keep reference staff sharp.

At their heart, reference services need to be customer-service oriented. Chapter 3, "Users," discusses types of users, the categories of research they may perform, and how to identify and best assist each category. Individual researchers have various skill levels that may require extra guidance or specialized services. Chapter 4, "Reference Interaction," takes the discussion of users further, focusing on the need for good customer-service techniques when working with patrons. Good communication, active listening, a pleasant demeanor, patience, and the ability to read body language are all important in understanding patrons' needs and making them feel comfortable.

Three chapters focus on access. Chapter 5, "Physical Access," delves into the challenges of physical access, noting the need for user-friendly spaces that consider patron needs and provide helpful technology. Staffing needs, patron registration, guidelines for use, and practices for safe handling are some of the factors to make note of when providing access. Reference archivists are responsible for educating patrons about rules and proper document handling as well as enforcing these rules when necessary. Periodic security evaluations and regularly scheduled inventories are recommended. Chapter 6, "Intellectual Access," discusses "all the information to find, use, and access collections" (p. 65). The processing stage of archival work has a strong influence on reference and access.

This section provides a brief overview of how collections should be arranged and described, noting the importance of archivists understanding their institution's arrangement scheme so they can help patrons find what they need. Finding aid formats and methods of presentation along with their advantages and disadvantages are also noted. Chapter 7, "Virtual Access," provides guidance on how to present information online, as well as what information should be presented. Accurate details about hours, contact information, collections holdings, how to seek access, and more should be included on a useful website. The chapter further explains how metadata enables search functions and provides some hints for making content easily found by online searches. While providing basic metadata for the title, creator, date, and subject fields provides access to an item, adding information such as related resources, original format, and other details helps to broaden searchability.

Chapters 8, 9, and 10 assess ethics, accessibility, legal regulations, and use policies that should protect patron privacy while adhering to legal guidelines that may apply to collections. Chapter 8, "Ethics, Patron Privacy, and Accessibility," notes the need for equal access and services that consider accessibility along with observing patron confidentiality. A plethora of legalities apply to collections use and access. Reference archivists should be "familiar with the most common regulations applicable to their institution's collections, where to find information concerning those issues, and how to inform patrons about access regulations" (p. 95). Written policies are needed for clear understanding and fair, consistent enforcement of regulations. Chapter 9, "Legal Regulations," offers an introductory overview of laws and regulations that archival institutions commonly encounter. Perhaps even more important than the explanation of these legal terms is the advice to seek legal counsel for issues that archivists may need help with understanding. Chapter 10, "Use Policies," continues the discussion of copyright and other applicable laws and details how they should be outlined in a use policy. Reproduction forms should include a notice of copyright and clear reproduction request procedures. Policies should include notices stating that copies will not be made if it would result in damage to the collections. Forms should include wording designed to mitigate illegal use of copies, whether they are physical or digital.

Outreach activities can help bring awareness to your collections and your organization.⁴ Chapter 11, "Outreach," offers ideas for approaching outreach and suggests types of events that can be successful. Repositories should identify goals for their programs, identify the audiences they are trying to reach, and consider staff limitations in their planning. Lectures, tours, workshops, exhibits, and many other events can help advocate for the collections and draw the public in. Website and social media posts can also be considered a form of outreach, as posts that highlight collections and services help the public find items of interest. Chapter 12, "Assessment of Reference Programs," calls for quantitative and

qualitative assessment of reference services. Tracking collections use, exit interviews, experience surveys, and evaluating compliments as well as complaints can help repositories understand how best to serve their patrons.

Chapter 13, "The Future of Access and Reference," finishes the main body of the publication and offers a few thoughts on what the future may hold for reference work. The chapter cites the need for continued and increased online accessibility. The postscript of this work briefly touches upon the changes that the pandemic has brought to the field and notes that these times will undoubtedly bring changes to how we think about access and reference services in the future.

For veteran reference archivists, some chapters of *Reference and Access for Archives and Manuscripts* may seem to make obvious points and may serve more as a review than a presentation of new material. For students of archival studies, this work is an excellent tool for understanding what reference archivists do, how such departments function, and how they fit within the larger picture of an archival organization. This volume would be particularly helpful as archival course material, as well as for archivists who are new to the reference side of archival work. A great strength of the book is that concepts are presented in a way that encourages readers to apply them to their own organizations. This volume will serve as a useful tool for completing reference tasks.

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- ¹ While aspects of reference services have been the subject of many scholarly articles, *Reference and Access for Archives and Manuscripts* pulls all the concepts and research together for a comprehensive volume written by a single author. The volume provides an expanded update of the 2005 Archival Fundamentals Series II publication, *Providing Reference Services for Archives and Manuscripts*, by Mary Jo Pugh. There are few comparably comprehensive works regarding reference work. *Reference Services for Archives and Manuscripts*, edited by Laura B. Cohen in 2012, provides a series of essays written by multiple authors that cover different aspects of reference services. *Reimagining Reference in the 21st Century*, edited by David A. Tyckoson and John G. Dove in 2014, is similar in format and provides a look at reference services that, while containing useful information, is geared toward library reference services as opposed to archival reference. These two volumes fail to emphasize providing access, a strength of Oestreicher's work.
- ² Society of American Archivists, "Emerging Leader Award: Cheryl Oestreicher," <https://www2.archivists.org/node/19814>, captured at <https://perma.cc/PJ8F-B5Y9>.
- ³ Security cameras have made the task of tracking suspicious behavior easier, but there is no substitute for having as many eyes as possible on restricted reading room access areas. Some institutions hire uniformed guards and find retired police officers to be ideal for the job. A surprisingly relevant source is John M. Kinney's article "Security and Insecurity," which appeared in the October 1975 volume of *American Archivist*. Many of his points still apply in 2021.
- ⁴ This volume gives a good overview of outreach, but this series would benefit from a volume dedicated entirely to outreach procedures and ideas. The third volume in the Archival Fundamentals Series III, *Advocacy and Awareness for Archivists* by Kathleen D. Roe, touches on how outreach is a form of advocacy, but provides information geared toward raising awareness of an organization, not providing educational programming.