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Summary Report on
Special Collections and Archives
Statistics during a Five-Year Period
(July 2004- June 2009) to Determine Whether
Collections and Services Provide Patrons with the
Information Requested



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Section 1: Quantitative Measures

Means of Assessment #2: An evaluation of Special Collections and Archives (SCA) patron use statistics over 5 years starting in the 2004/05 academic year through to the 2008/2009 academic year will reveal usage trends by students, faculty, and community patrons and the subject of information inquiries (for example, local history, genealogy, marine science, USF SP archives, etc.). Such information will inform SCA staff and library administration of important areas for further targeted collection development and outreach in attracting new research collections.

Criteria for Success: Analysis of information requests will find that 75% of USF SP faculty and students were able to successfully locate appropriate resources at the Poynter Library SCA or were successfully directed to alternative repositories that contain suitable materials.

The following breakdown summarizes total requests, total research requests, and method of transaction (in-person versus patron contacting the library without visiting the facility):

	<u>2008-2009</u>	<u>2007-2008</u>	<u>2006-2007</u>	<u>2005-2006</u>	<u>2004-2005</u>
Total number of transactions during the fiscal year	404	362	327	291	288
Total number of transactions that were research requests	325	287	257	238	230¶
Percentage of transactions that were research requests	80.4%	79.3%	78.6%	81.8%	79.9%
Percentage of total transactions <u>here</u> :	66.6%	72.1%	70.4%	73.9%	<i>no data</i>
Percentage of total transactions <u>outside</u> :	33.4%	27.9%	29.6%	26.1%	<i>no data</i>
Percentage of total research requests <u>here</u> :	58.5%	64.8%	62.3%	68.1%	<i>no data</i>
Percentage of total research requests <u>outside</u> :	41.5%	35.2%	37.7%	31.9%	<i>no data</i>

¶-- The 2004-2005 annual report lists 238 research requests, rather than the 230 mentioned above. The reason for this discrepancy is that eight of those requests were carried over from the original spreadsheet of patron research request statistics created in May 2004. The original spreadsheet covered the period from May through June 2004 before it was reformatted into the spreadsheet later used. Although some research did take place after 1 July 2004 to satisfy those requests, they should be credited to the 2003-2004 fiscal year and thus are not included. Also, no data is available to differentiate between requests completed on campus versus those to serve patrons who never physically visited the library in 2004-2005 because the librarian did not start tracking that data until 1 July 2005.

Composite Summary of Patrons Initiating In-Depth Research Requests

Total Patron Transactions in SCA (1 July 1994 through 30 June 2009): **1672**
 Total In-Depth Requests (1 July 1994 through 30 June 2009): **1337**
 Percentage of Total Patron Transactions that were In-Depth Requests: **79.97%**

The following breakdown of in-depth requests during each fiscal year (July 1-June 30) examines institutional affiliation and status:

	<u>2008-2009</u>	<u>2007-2008</u>	<u>2006-2007</u>	<u>2005-2006</u>	<u>2004-2005</u>
USF undergraduate students:	30 (9.2%)	47 (16.4%)	56 (21.8%)	24 (10.1%)	25 (10.9%)
USF graduate students in History or Florida Studies:	48 (14.8%)	49 (17.1%)	32 (12.5%)	29 (12.2%)	30 (13.0%)
USF graduate students in other disciplines:	51 (15.7%)	8 (2.8%)	5 (1.9%)	11 (4.6%)	8 (3.5%)
Patrick Riordan Fellow (visiting Ph.D. spon by USF Tampa):	0	10 (3.5%)	0	0	0
Eckerd College students (residential or PEL):	22 (6.8%)	23 (8.0%)	11 (4.3%)	15 (6.3%)	11 (4.8%)
Undergraduates from schools other than USF or Eckerd:	5 (1.5%)	0	1 (0.4%)	3 (1.3%)	0
Graduate students from schools other than USF:	3 (0.9%)	7 (2.4%)	10 (3.8%)	10 (4.2%)	2 (0.9%)
<i>SUBTOTAL: Students as researchers</i>	159 (48.9%)	144 (50.2%)	115 (44.7%)	92 (38.7%)	76 (33.0%)
Faculty or staff in History or Florida Studies:	25 (7.7%)	31 (10.8%)	33 (12.9%)	27 (11.3%)	47 (20.4%)
Faculty or staff in Mar Science and Affiliates (i.e., USGS):	8 (2.5%)	4 (1.4%)	3 (1.2%)	4 (1.7%)	1 (0.4%)
USF St. Petersburg Administration or Advancement staff:	16 (4.9%)	12 (4.2%)	4 (1.6%)	14 (5.9%)	2 (0.9%)
Other USF faculty or staff (including Tampa campus):	10 (3.1%)	19 (6.6%)	10 (3.8%)	21 (8.8%)	11 (4.8%)
Other USF (includes Alumni and unclassified):	6 (1.8%)	2 (0.7%)	4 (1.6%)	10 (4.2%)	14 (6.1%)
Faculty or staff from Eckerd College:	3 (0.9%)	2 (0.7%)	3 (1.2%)	2 (0.8%)	0
Faculty or staff from other academic institutions:	12 (3.7%)	18 (6.3%)	15 (5.8%)	15 (6.3%)	2 (0.9%)
<i>SUBTOTAL: Faculty or Staff as researchers</i>	80 (24.6%)	88 (30.7%)	72 (28.1%)	93(39.1%)	77 (33.5%)
Florida Humanities Council (FHC):	3 (0.9%)	0	11 (4.3%)	2 (0.8%)	0
Society for Advancement of Poynter Library (SAPL):	1 (0.3%)	1 (0.3%)	0	2 (0.8%)	0
Poynter Institute of Media Studies:	1 (0.3%)	0	3 (1.2%)	2 (0.8%)	2 (0.9%)
Heritage Village (Pinellas County Government):	18 (5.6%)	9 (3.1%)	12 (4.7%)	24 (10.1%)	40 (17.4%)
Public Libraries/other state, local, or county government:	15 (4.7%)	8 (2.8%)	2 (0.8%)	5 (2.1%)	14 (6.1%)
Corporate and for-profit (includes newspaper reporters):	6 (1.8%)	4 (1.4%)	7 (2.7%)	3 (1.3%)	2 (0.9%)
General Public and Unclassified:	42 (12.9%)	33 (11.5%)	35 (13.5%)	15 (6.3%)	19 (8.2%)
<i>SUBTOTAL: Affiliates or General Public as researchers</i>	86 (26.5%)	55 (19.1%)	70 (27.2%)	53(22.2%)	77 (33.5%)

The following breakdown of in-depth requests during each fiscal year (July 1-June 30) examines institutional affiliation:

	<u>2008-2009</u>	<u>2007-2008</u>	<u>2006-2007</u>	<u>2005-2006</u>	<u>2004-2005</u>
University of South Florida (students/faculty/staff):	186 (57.2%)	171 (59.6%)	147 (57.2%)	138 (57.9%)	124 (53.9%)
USF affiliates (SAPL, FHC, Poynter Inst., USGS, etc.):	12 (3.7%)	2 (0.7%)	14 (5.4%)	8 (3.4%)	16 (6.9%)
Patrick Riordan Fellow (visiting Ph.D. spons by USF)	0	10 (3.5%)	0	0	0
Total USF-affiliated researchers	198 (60.9%)	183 (63.8%)	161 (62.6%)	146 (61.3%)	140 (60.8%)
Other academic researchers (Eckerd, UF, FSU, etc.):	47(14.5%)	50 (17.4%)	40 (15.6%)	45 (18.9%)	15 (6.5%)
Government researchers, public museums:	30 (9.2%)	17 (5.9%)	14 (5.5%)	29 (12.1%)	54 (23.5%)
Corporate, for-profit, and general public:	50 (15.4%)	37 (12.9%)	42 (16.3%)	18 (7.6%)	21 (9.1%)
Total non-affiliated researchers	127 (39.1%)	104 (36.2%)	96 (37.4%)	92 (38.7%)	90 (39.2%)

Five-Year Composite Summary of Patrons Initiating In-Depth Research Requests

Total In-Depth Requests (1 July 1994 through 30 June 2009): **1337**

	<u>Number</u>	<u>Percentage of Total</u>
USF undergraduate students:	182	13.6%
USF graduate students in History or Florida Studies:	188	14.1%
USF graduate students in other disciplines:	83	6.2%
Patrick Riordan Fellow (visiting Ph.D. spons by USF Tampa):	10	0.7%
Eckerd College students (residential or PEL):	82	6.1%
Undergraduates from schools other than USF or Eckerd:	9	0.7%
Graduate students from schools other than USF:	32	2.4%
Faculty or staff in History or Florida Studies:	163	12.2%
Faculty or staff in Mar Science and Affiliates:	20	1.5%
USF St. Petersburg Administration or Adv. staff:	48	3.6%
Other USF faculty or staff (inc. Tampa campus):	71	5.3%
Other USF (includes Alumni and unclassified):	36	2.7%
Faculty or staff from Eckerd College:	10	0.7%
Faculty or staff from other academic institutions:	62	4.6%
Florida Humanities Council (FHC):	16	1.2%
Society for Advancement of Poynter Library (SAPL):	4	0.3%
Poynter Institute of Media Studies:	8	0.6%
Heritage Village (Pinellas County Government):	103	7.7%
Public Libraries/other state, local, or county government:	44	3.3%
Corporate and for-profit (includes newspaper reporters):	22	1.6%
General Public and Unclassified:	144	10.8%
Students as Researchers	586	43.8%
Faculty or Staff as Researchers	410	30.7%
Affiliates or General Public as Researchers	341	25.5%
Total/percentage of researchers with USF System affiliation	828	61.9%
Total/percentage of researchers without USF affiliation	509	38.1%

The following breakdown of in-depth requests during each fiscal year (July 1-June 30) examines type of information requested. The percentages surpass 100% because requests sometimes covered multiple areas; thus, the percentage reflects the proportion of each year's total in-depth requests that fell into that specific area, field, or provenance:

	<u>2008-2009</u>	<u>2007-2008</u>	<u>2006-2007</u>	<u>2005-2006</u>	<u>2004-2005</u>
Biographical, genealogical, or census information:	88 (27.1%)	50 (17.4%)	47 (18.3%)	21 (8.8%)	48 (20.9%)
Photographic or cartographic research:	38 (11.7%)	33 (11.6%)	31 (12.1%)	38 (16.0%)	23 (10.0%)
Local and regional history/Floridiana topics:	220 (67.7%)	187 (65.2%)	181 (70.4%)	162 (68.1%)	175 (76.1%)
Journalism and media studies:	28 (8.6%)	23 (8.2%)	14 (5.4%)	14 (5.9%)	7 (3.0%)
Institutional history from USFSP archives:	33 (10.2%)	22 (7.7%)	19 (7.4%)	29 (12.2%)	24 (10.4%)
U. S. Maritime Training Service base history:	7 (2.2%)	6 (2.1%)	2 (0.8%)	8 (3.4%)	11 (4.8%)
General history/historiography (non-Florida):	25 (8.6%)	41 (14.3%)	23 (8.9%)	7 (2.9%)	6 (2.6%)
Other areas of the humanities (literature, etc.):	35 (10.8%)	31 (10.9%)	15 (5.8%)	12 (5.0%)	4 (1.7%)
Marine science and ichthyology:	5 (1.5%)	4 (1.4%)	9 (3.5%)	8 (3.4%)	6 (2.6%)
Researching and writing tools and processes:	17 (5.2%)	14 (4.9%)	12 (4.7%)	11 (4.6%)	21 (9.1%)
Professional consultation by colleagues:	33 (10.2%)	21 (7.3%)	19 (7.4%)	17 (7.1%)	18 (7.8%)

	<u>2008-2009</u>	<u>2007-2008</u>	<u>2006-2007</u>	<u>2005-2006</u>	<u>2004-2005</u>
Books, serials, periodicals in SCA:	151 (46.5%)	138 (48.1%)	148 (57.6%)	129 (54.2%)	130 (56.5%)
Manuscript collections in SCA (incl. oral hty):	73 (22.5%)	95 (33.1%)	72 (28.0%)	98 (41.2%)	57 (24.8%)
USF St. Petersburg archival collections in SCA:	41 (12.6%)	27 (9.4%)	23 (8.9%)	33 (13.9%)	22 (9.6%)
USF and SUS digital collections:	178 (54.8%)	150 (52.3%)	125 (49.4%)	104 (43.7%)	113 (49.1%)
Referred patron to USF Tampa special collections:	11 (3.4%)	20 (7.0%)	31 (12.1%)	15 (6.3%)	12 (5.2%)
Referred patron to St. Pete Museum of History:	7 (2.2%)	16 (5.6%)	19 (7.4%)	13 (5.5%)	14 (6.1%)
Referred patron to Heritage Village:	5 (1.5%)	21 (7.3%)	27 (10.5%)	21 (8.8%)	23 (10.0%)
Referred patron elsewhere (i.e. State Archives):	39 (12.0%)	45 (15.7%)	44 (17.1%)	15 (6.3%)	30 (13.0%)
<i>No Further Info/Assistance could be offered:</i>	<i>12 (3.7%)</i>	<i>3 (1.1%)</i>	<i>1 (0.4%)</i>	<i>0</i>	<i>5 (2.2%)</i>

Five-Year Composite Summary of Requests that Could Not be Fulfilled or Referred Elsewhere

Total In-Depth Requests (1 July 1994 through 30 June 2009) Unfulfilled: **21 of 1337, or 1.57%**

2008-2009: 12 of 325 requests, or 3.7%

2007-2008: 3 of 287 requests, or 1.1%

2006-2007: 1 of 257 requests, or 0.4%

2005-2004: 0 of 238 requests, or 0%

2004-2005: 5 of 230 requests, or 2.2%

Section 2: Qualitative Assessment and Discussion

Part A: Patron Request Trends

Since the summer of 2004, Special Collections and Archives (SCA) staff members have tracked two types of patron requests. The **total number of transactions** reflects the number of walk-in patrons who have used materials within the collections. Transactions classified as **“research requests”** came from patrons who sought research assistance, reference interviews, or guidance with the collections that went beyond the retrieval of materials that patrons had requested. In most cases, a “research request” means that SCA staff has devoted a minimum of fifteen minutes of staff time to assisting the patron with discussing sources available, describing the context or provenance of materials, and/or suggesting alternative sources or venues that may assist the researcher. Please note that general reference questions from the reference desk (which are included in Reference Desk statistics) and bibliographic instruction sessions (**even if held in SCA**) are not included in the transactions listed in this report since they are tracked by the Reference Department. Thus, if the librarian meets with twenty students from a class to talk about local history sources available in SCA, those numbers are reflected in the Reference Department statistics, but not the SCA statistics in this report. However, if five students request individual appointments to learn about resources in greater detail, the academic support for these five transactions would be included in this report. Also, patrons who came to SCA to ask general library questions (assistance with finding books on the third floor, location of restrooms, etc.) are not included in these statistics.

Between July 1994 and June 2009, staff in SCA assisted 1672 patrons who requested materials or guidance from this area of the library. Of these transactions, 1337 (or nearly 80%) required a minimum of fifteen minutes of staff guidance and support. Four out of five visitors to SCA during this five-year period did more than page books or make basic research requests of a passive nature; they received a level of service that required staff to work closely with them or actively examine materials and possibly suggest additional repositories. Despite budgetary reductions and limited graduate student assistant support, between 2004 and 2009 SCA accommodated a 40.3% increase in the total number of transactions and more than a 41% increase in “research requests” without any disruption of service.

Requests came from patrons visiting the library, as well as from those who contacted staff from off-campus locations. For record-keeping purposes, since July 2005 SCA staff members have divided these research transactions into two categories. **Outside** requests were reference or research inquiries where all facets of the process involved written correspondence, telephone calls, or email messages without the patron actually visiting the library. Requests from **here** either originated from a USF office, department, or employee (including other USF campuses) or involved on-site visits to the SCA reading room.

Part B: Institutional Affiliation and Status of Patrons Requiring In-Depth Assistance

SCA patrons include members of the various campuses in the USF System, visiting students and faculty from other institutions, researchers, genealogists, employees of corporations seeking information, and members of the general public. The librarian tracks the institutional affiliation of patrons initiating research requests to assure that staff time and resources serve the mission of the Poynter Library and University of South Florida St. Petersburg. Please note that many of these 1337 research requests required multiple visits, telephone calls, emails, or other forms of communication as the researchers developed their topics or had additional questions about the same topic.

A review of this five-year period indicates that 828 of the 1337 research requests (61.9%) served patrons with a direct USF affiliation. The remaining requests came from a variety of sources, including Heritage Village, the St. Petersburg Museum of History, patrons referred to SCA by public libraries, genealogists, and students or faculty from other academic institutions. During this period, students (at USF, Eckerd College, or elsewhere) represented 586 (43.8%) of the total number of research requests, with faculty and staff (at USF, Eckerd College, or other educational institutions) making 410 requests (30.7%). The remaining requests (25.5%) originated with non-profit organizations, other governmental institutions, public libraries, historical societies, genealogists, and members of the general public. With more than six in ten research requests supporting patrons from the University of South Florida System and nearly 75% of all research requests emanating from patrons at colleges or universities, SCA does serve a broad range of academic researchers from undergraduates to those earning advanced degrees or faculty authoring monographic studies.

Part C: Type of Information Requested, Sources Consulted, and Referrals

SCA staff and patrons consulted a variety of sources to fulfill requests. Frequently, they examined materials in more than one area of the collection or in multiple formats. When patrons required information that did not appear in print and manuscript collections, staff often consulted public and proprietary electronic resources (such as PALMM, Lexis/Nexis Academic, and the Google Newspaper Archive) in an attempt to locate sources. On a regular basis, after completing research requests, the librarian tracks the type(s) of information requested, the source(s) consulted, and any referrals that staff may make to encourage patrons to contact other libraries, archives, or repositories. In some cases, a single request may cover many areas. For example, a genealogist interested in photographs and biographical information about a member of a pioneer family would fall under the areas of “biographical, genealogical, or census information,” “photographic or cartographic research,” and “local and regional history/Floridiana topics” in the broad classification schemes used in SCA. If the patron found sufficient information during their visit, the staff would keep track of the types of materials used (books, manuscript collections, etc.). However, if the patron requested information that may also reside elsewhere, the librarian also tracked places or sources that were suggested to the patron. These broad categories allow SCA staff to track usage patterns while maintaining the confidentiality of individualized research transactions.

Usage patterns over the five-year period indicate that nearly seven out of ten requests (925 of 1337) focused on local, regional, and Florida history topics. Despite the substantial and valuable research materials related to marine science, ichthyology, and natural history located in SCA, only 2.4% of the in-depth research requests fell under these fields (and most of these requests came from outside entities, such as Mote Marine Laboratory in Sarasota, rather than the USF College of Marine Science). Approximately 9.5% of all requests required an examination of materials in the USF St. Petersburg Archives, although it is expected that this percentage will increase with the move towards developing a digital archive in the future.

Usage patterns of materials provide important information for collection development and management. Printed books, serials, and periodicals were examined for 52.1% of the in-depth research transactions. Staff and patrons consulted manuscript collections or oral history interviews for 29.5% of the requests; they accessed items from the USF St. Petersburg Archives for 10.9% of in-depth research requests. Staff examined electronic databases and digital collections to respond to slightly more than half of the requests.

Referrals to other institutions occurred when SCA staff knew of or learned of sources at other repositories that would assist the researcher or complement our library’s holdings. In many cases, researchers used collections at the Poynter Library as well as outside materials. Referrals fell into four categories: those directed to the Special Collections Department at USF Tampa Library (6.7% of all in-depth requests), those directed to the St.

Petersburg Museum of History (5.2% of all in-depth requests), those directed to Heritage Village's Archives and Library (7.3% of all in-depth requests), and those directed to other repositories or multiple facilities (12.9%). Although limited staff resources made it difficult to contact all patrons as a follow-up measure to determine if other locations could be of assistance, staff strongly encouraged patrons to contact SCA if other sites failed to provide assistance or were not helpful.

Part D: Summary

Special Collections and Archives (SCA) at the Poynter Library has helped 1672 patrons locate information and conduct research during a five-year period from July 2004 through June 2009. Nearly 80% of these researchers (1337) required assistance or research support that exceeded the retrieval of materials for their review within the reading room. Each of these in-depth research requests required a minimum of fifteen minutes to fulfill, and they often took place during multiple visits and required numerous telephone calls and emails. The number of research requests has increased by 41% during this period. The majority of patrons (61.9%) have an affiliation with the University of South Florida System and nearly three-fourths (74.5%) have an affiliation with an institution of higher learning.

During the period under review, SCA staff failed to fulfill only 21 of the 1337 detailed research requests through the use of materials within SCA, the general library collection, electronic resources, or referrals to other venues. Thus, SCA staff members were able to provide some level of support, instruction, guidance, assistance, and professional consultation in an attempt to meet 1316 of the 1337 requests, a rate of 98.42% that exceeds the 75% postulated in the criteria for success.

Two important caveats must be considered by SCA staff in reviewing this data. Although SCA was able to locate materials in-house, electronically, or through referrals in 98.42% of the detailed research requests, we cannot verify that all information located or all referrals suggested were ultimately useful to the researcher as they continued their studies. Also, some of the 21 requests were unfulfilled because no such material was known to exist. For example, a staff member requested a photograph of someone formerly affiliated with USF St. Petersburg but a full review of archival photograph holdings failed to reveal an image of this person. In another case, a person sought original film footage from the dedication of the Sunshine Skyway bridge created by WSUN-Channel 38, a television station that ceased operations by the early 1970s.

Aside from these caveats, this review offers great insight to SCA staff as they continue to offer services to patrons in the Poynter Library. Collection usage patterns reveal areas for revision in the departmental collection development and management policy. Service remains a high priority in daily operations of SCA.