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Review of Reference and Access for Archives and Manuscripts

Cindy Brightenburg

Brigham Young University, bright@byu.edu

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Review of *Reference and Access for Archives and Manuscripts*

By Cheryl Oestreicher. Chicago: Society of American Archivists, 2020.
195 pp. Softcover. \$69.00. ISBN: 978-1-945246-38-8

It has been well over 15 years since Mary Jo Pugh's seminal book, *Providing Reference Services for Archives and Manuscripts*, was published. Pugh's book guided reference staff in the unique aspects of archival access and served as the go to manual for all things reference. It covered security, reference interviews, mail and phone inquiries, and copying procedures. Since then, much has changed in the field of providing access to archival materials, such as the issues of born digital collections, online digitization, and emerging new technologies for access.

Cheryl Oestreicher is the most recent archivist to attempt to bridge the gap between the present and the past by updating reference best practices and addressing innovation. She is uniquely qualified to produce a book on reference and access for archives and manuscripts. Oestreicher, a 20-year veteran of library and archives work, currently serves as the head of Special Collections and Archives at Boise State University. In addition, she has extensive experience teaching classes on reference, access, and outreach through Clayton State University's Master of Archival Studies program.

This manual is one of seven books published by the Society of American Archivists (SAA) as part of their Archives Fundamentals Series III. The Archives Fundamentals Series III aims to provide the core knowledge needed by archivists to work effectively with records/archives and papers/manuscripts, both analog and digital, in the twenty-first century. This volume of the series intends to apprise readers of the current practices in archives and special collections repositories related to reference.

The book is arranged into thirteen chapters. Chapter one introduces the unique aspects of reference in archives, chapter two discusses reference skills, and chapter three gives a practical overview of archival users. Chapter four explains the reference interview, while chapters five, six, and seven deal with physical, intellectual, and virtual access to archival materials. Chapters eight and nine cover the topics of ethics and legal considerations while chapter ten delves into the aspects of copyright and the public domain that impact reference. Chapters eleven and twelve deal with best practices for providing outreach and assessment of reference programs, with the last chapter looking into the future of reference. A postscript was added by the author before publication to address how the COVID-19 pandemic and other world events affected archival access and how services had to adapt. The book also includes six appendices of sample forms from various archival and library institutions.

Oestreicher provides a brief overview of the history of reference services in archives and special collections and then turns her attention to the business of reference services. She starts with the basics discussing the skills and knowledge needed for those who work in reference and introduces the components of reference transactions, including what questions to ask and how to deal with difficult patrons. In her chapter on users, she separates users into five categories: Internal, Scholarly, Public, Educational and Archivists. Oestriecher understands that users are unique in their research purposes, expertise, and knowledge of archives. In each category, helpful subsections of who they are, what their research outputs are and what type of reference assistant they need are expertly described with very useful advice on how to best meet their individual needs.

Providing access is an important part of reference services and Oestreicher constructively shares instruction on the best practices for physical, intellectual, and virtual access. These sections cover reading room rules, registration, security, and proper care and handling as well as considerable information regarding physical arrangement, and the use of finding aids. For those archives who may not have an institutional OPAC, a list of alternative formats is provided. While not optimal, formats such as Word documents, pdfs, Excel spreadsheets, and websites are other ways of creating inventories for patron use. With more and more patrons expecting access to online content, Oestreicher presents good recommendations in the virtual access section. This section has a checklist of components for an effective website, how to make it appealing to users, and lists a variety of systems and formats for providing digital access. However, born digital records, digitization and metadata are only briefly mentioned as concepts the reference archivist should know about, and the author does not go deeper into these topics. Regarding innovations in virtual access, an example of how a virtual reading room can be used was quite interesting, as well as a section on how digital research, text mining and digital humanities is increasing the use of archives in new and unusual ways. It was good to see that these topics were not left out.

In addition to access, reference archivists are asked to play a role in ethics, privacy, legal and copyright issues, and use policies. The information and direction given in these sections of the book are invaluable. Often, reference professionals must field copyright and ethical issues with little to no training. The section on copyright is well written, easy to understand, and has a copyright status chart that could be used as a quick reference guide to help with copying decisions. Created by Cornell University Library, the chart has sections for most any format found in archives today.

Outreach and assessment are the final sections for which Oestreicher advocates, and she recommends best practices for both. Her recommendations for outreach, including the use of exhibits, tours, and social media accounts, do not offer anything new as these programs are commonly used by archives and special collections. It would have been helpful if this section explored new and creative approaches to outreach. The assessment section is quite informative, however. As we know, data

drives decisions and archives are continually collecting statistics in some form or another but may not be fully using them to their advantage. After reading this chapter, I found myself more motivated to take another look at how the statistics in my own work could be used to implement change. I also appreciated Oestreicher's inclusion of the recently published "Standardized Statistical Measures and Metrics for Public Services in Archival Repositories and Special Collections Libraries" document created jointly by the Society of American Archivists (SAA) and the Rare Book and Manuscript Section (RBMS) of the Association of College and Research Libraries (ACRL). This document provides invaluable professional metrics and guidance to standardize archival assessment.

Perhaps the most useful part of the book is the appendices, which include sample registration and photocopying forms, a sample archive website and even a sample reference manual outline. The sample permission to publish form is very useful for archives that are not part of a larger institution and may struggle to know how to deal with legal and copyright issues surrounding publication of their materials. The inclusion of these materials provides smaller institutions with convenient and pragmatic direction.

It was interesting to note that while referring to reference employees, more than one term was used as a title. The titles "reference professional," "reference staff members," and "reference archivists" were used interchangeably. In the preface, Oestreicher explained that she wanted to "encompass anyone who performs reference services.¹ She also used the titles of "patrons," "researcher," and "user" interchangeably to describe those who use archives. She clearly understands her audience by addressing her writing to a variety of archive types, both large and small, an approach which makes her book more inclusive and accessible.

The book is well written with easy-to-understand language. It does not attempt to delve deep into archive issues or try to cover every possible scenario. Its purpose is to look at all the many responsibilities of reference personnel in the unique space of providing archival access and suggest best practices. It does so successfully.

The author is adept at backing up her statements using professional research. I appreciated how she used SAA and ACRL definitions and guideline throughout the book, as well as scholarly studies showing current research. In addition, examples from archives around the country were used in just the right places to help the reader better understand the concepts being described.

While this book focuses on the basics of reference services, there were ideas that even seasoned reference staff could learn from. I would recommend this book to those who may be new to archival reference as a practical and professional training

1. Cheryl Oestreicher, *Reference and Access for Archives and Manuscripts* (Chicago: Society of American Archivists, 2020), xiv.

manual. *Reference and Access for Archives and Manuscripts* would be a good addition to the shelves of archives and libraries, as the most current reference book for, well, reference.

Cindy Brightenburg
Reference Specialist
L. Tom Perry Special Collections
Harold B. Lee Library
Brigham Young University
Provo, Utah