The Southeastern Librarian

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The Southeastern Librarian
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Articles

News and Columns

Cover: "Simple: Camellia Aitonia," from Lorenzo Berlèse's classification of camellia forms in
*Monographie du genre Camellia, * 3rd edition (Paris: Chez H. Cousin, 1845). Among special collections
in the University of South Carolina's Thomas Cooper Library is the Phelps Memorial Collection of Garden
Books, donated in 1959. A web exhibit on camellia books is available at
http://www.sc.edu/library/spcoll/nathist/camellia/camellia.html

Call for Proposals

Georgia Conference on Information Literacy
Georgia Southern University
October 8-9, 2004

Jointly hosted by the Zach S. Henderson Library, the Department of Writing and Linguistics, and the College of Education at Georgia Southern University, the Georgia Conference on Information Literacy seeks proposals for workshops and presentations that address the following themes and issues:

- Strategies for teaching information literacy to students and/or faculty across the curriculum

- Empirical studies on the effect of information literacy initiatives on student retention and/or learning

- Learning communities and information literacy

- Creating teaching partnerships between reference librarians and instructors

- What constitutes information literacy in the 21st century

- Encouraging lifelong learning through information literacy

- Technological developments and their impact on student research

- Strategies for evaluating sources

- Information Literacy and the Sciences

- Computers in the writing classroom: how the research paper has changed

- Developing learning outcomes for information and technological competence

- Preparing students for the modern University

The Georgia Conference on Information Literacy will offer both hands-on workshops and concurrent sessions for K-12, community college, and university librarians and educators, covering a broad spectrum of needs and proficiencies with twenty-first century information literacy skills and issues, from those seeking how-to information to those wishing to contribute to the growing body of scholarship.

For more information, see the Call for Proposals at:
http://conted.gasou.edu/informationliteracy.html or contact Bede Mitchell, Dean of the Library, at wbmitch@gasou.edu or Janice Walker, Dept. of Writing and Linguistics, at jwalker@gasou.edu.

Proposals must be received by no later than December 15, 2003.

President's Column

Congratulations to Reinette F. Jones and the Kentucky Library Association for taking the lead in getting the American Library Association Council to pass a memorial resolution in honor of Reverend Thomas Fountain Blue. The Southeastern Library Association was a cosponsor for the resolution that was passed at the annual conference in Toronto. In a letter accompanying SELA's copy of the resolution, Keith Michael Fiels, ALA Executive Director, described Reverend Blue as follows:

> "Throughout his career, he participated in all aspects of making the library an accessible, innovative, and interesting place to be and work. As the first African American to manage public libraries with an entire African American staff, he was a veteran in the dissemination of information and resources to African Americans. He was active in his community and worked toward fairness and justice for everyone. Through his professionalism and involvement he provided an invaluable service to the library profession."

We should all be very proud that we can claim such an outstanding person and librarian as a fellow southeasterner! If you would like to read a brief biography of Reverend Blue, you can go to the web page for the Louisville Free Public Library at **http://www.lfpl.org/western/htms/blue.htm.**

The Southeastern Library Association has recently taken a major step into the twenty-first century. Frank Allen received a request from H. W. Wilson Company that it be allowed to offer online access to the **Southeastern Librarian.** We have established an agreement to allow Wilson electronic publishing rights to the journal beginning with the third issue of the current volume (51). This will mean that the **Southeastern Librarian** will be available to scholars not only from the Southeastern Library Association web site but also via H. W. Wilson. I remember how excited I was the first time I went online in a national database to retrieve one of my articles, and I look forward to seeing authors published in the **Southeastern Librarian** being offered the same opportunity. Frank Allen will be sharing information about the forms that have been developed for author approval. They were fashioned after those in use by the American Library Association, and they were reviewed by Michael Seigler who is not only an active SELA member but also a lawyer. They seem to be effective for both the authors and the association.

There is also news from the North Carolina Library Association. The location of the 2004 Joint NCLA/SELA Conference will be Charlotte, and the **probable** dates will be in early November. We really appreciate all the hard work our colleagues from North Carolina have done to bring this conference closer to reality. Stay tuned to the SELA web page, SELA-L, and the **Southeastern Librarian** for more information as plans progress. The success of our conferences depends on both participation by vendors and contributions by program planners and presenters. Please encourage any vendor from whom you purchase anything for your library to consider encouraging her/his company to plan to exhibit at the conference. If you have an idea for a program, have a program in development or ready to go, or know someone within the library community who presents outstanding programs, please contact the appropriate division, section, or committee chair within SELA and let him/her know about that program opportunity.

-- Ann Hamilton

From the Editor

This issue represents a broadening of scope for *The Southeastern Librarian* (SELn) in several areas. We are happy to share that SELA and the H.W. Wilson Company have reached an agreement for Wilson to distribute the content of the SELn online. Our authors will now have the pleasure of knowing that their research and publication efforts are reaching new audiences far beyond the print readership of the journal. This is an exciting development and one we hope fosters additional interest in submitting to the journal. As part of this change, SELA is requesting authors to complete a copyright assignment agreement. The form that SELA has adopted can be found at the back of this issue. This serves to protect all parties and is a flexible instrument that can be modified for special circumstances.

This issue features two book reviews. We took a rather pragmatic approach in soliciting them. Rather than the traditional method of requesting review copies from publishers and then distributing copies to reviewers, we simply asked members to review a title of interest that had some connection to the South – either by content or authorship. Let's try this again! If you are interested take a look at the book reviewer instructions at the SELA web site at http://sela.lib.ucf.edu/SoutheasternLibrarian/SELn.htm. I look forward to hearing from you.

Readers will notice two advertisers in this issue. I want to thank Georgia Southern University and SIRS for their interest and confidence in our journal. Paid advertisements such as these are helping to defray the increasing cost of print publishing, and will assist in the effort to continue offering *The Southeastern Librarian* as both a print and online journal.

Lastly and certainly not least, thanks to our authors in this issue for their research and scholarly contributions. This is ultimately what the journal is all about. Among the varied topics in this issue, please note that we are happy to again feature the winning papers from the SELA "New Voices" program. Thanks to the UCLS section members for their continuing efforts with this worthwhile program which encourages newer librarians to the profession to present and publish.

It is a privilege to serve as your editor. Please let me know of any feedback or suggestions.

-- Frank Allen

Looking For a Few Good Southern Authors

Please submit nominations for books (fiction or nonfiction) published within 5 years of December 31,2003. Use the form found at
http://sela.lib.ucf.edu/Archives/AwardInformation.html

Submit to the Southeastern Library Association Outstanding SE Author Awards Committee by the **March 31, 2004** deadline.

On Good Authority: NACO Participation at the University of Southern Mississippi

Kathleen L. Wells

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Introduction

"NACO? Isn't that only for the largest research libraries?" "We could never meet the quotas." "We don't have time to contribute." "Our work wouldn't generate the right kind of headings." "We don't do enough original cataloging." If your library has considered participation in authority control at the national level, questions and objections like the foregoing may have been raised. The prospect of contributing to an authority file used by libraries throughout the United States and beyond may be somewhat daunting in itself. However, participation in the Name Authority Cooperative Program may be within your library's reach. Since joining the program in November 2001, catalogers at the University of Southern Mississippi (USM) Libraries have found that many rewards and few drawbacks come with NACO membership.

NACO is the name authority component of the Library of Congress Program for Cooperative Cataloging (PCC). (The other components are BIBCO, through which participants create bibliographic records according to certain standards; CONSER, the cooperative serials cataloging program; and SACO, the subject authority program.) Through the NACO program, after appropriate training, libraries contribute authority records for names, series, and uniform titles to LC's online authority file. Records are contributed through the bibliographic utilities, OCLC or RLIN. Individual catalogers do not join NACO; participation is at the institutional level, though groups of libraries can form a *funnel project* to contribute records through a project coordinator (see "What About Quotas," below).

Getting Started

The first step in joining NACO is providing the Library of Congress with information on the applying institution's local online system, bibliographic utility, amount of cataloging and authority work performed, number of staff to be trained, and collection strengths (the application form is available at http://www.loc.gov/catdir/pcc/nacoappl.html). Samples of the institution's cataloging may be requested by LC. If the application is approved, the library can choose to send catalogers to LC for training, or have a NACO representative come to the institution and provide the training onsite. The institutions receiving the training are responsible for the trainer's travel expenses. By sharing the expenses with two other Mississippi institutions that sent catalogers to be trained, USM Libraries was able to host the weeklong training session onsite.

What Does the Training Involve?

NACO training involves a thorough review of the *Anglo-American Cataloguing Rules* (AACR2) Chapters 22-26, the corresponding Library of Congress Rule Interpretations (LCRI), and LC practice in the creation of authority records. The AACR2 chapters cover the establishment of headings for personal, corporate, geographic, and conference names as well as uniform titles. Most of the training focuses on personal, corporate and conference headings, since additional training is required for the submission of series authority records, music headings, and geographic name headings. During the week, trainees can use examples from their institution's cataloging to create actual name authority records that, on approval, will be added to the LC authority file, so they become NACO participants from the start. After the training, catalogers use OCLC or RLIN to submit their headings to a contact person assigned to their institution by LC's Cooperative Cataloging Team. This person reviews the library's records, answers questions, and provides further instruction as needed during a probationary period that can last up to a year. The length of the review period depends on how many records a library submits and on the quality of the records. When the NACO contact decides that an institution can operate without review, he/she gives the library independent status, authorizing its catalogers to add authority records directly to the LC file and to revise existing records. This release from review may come with certain

restrictions, which vary depending on the level of training the catalogers have received. The library may be authorized to contribute only certain types of authority records. The review period for USM Libraries lasted nine months, during which approximately 500 authority records were submitted and reviewed.

What Kind of Cataloging Generates Headings?

The short answer is, "anything not cataloged by the Library of Congress." As vast as LC's collections are, there are many types of material that may not be represented by DLC-DLC catalog records in the bibliographic utilities; titles not owned by LC are not likely to generate LC authority records. Audiovisual materials, some juvenile literature, state government publications, curriculum materials, and titles of local interest published by smaller presses or self-published by authors are possible sources of NACO headings. At USM, much of the Libraries' NACO work is generated by cataloging for the McCain Library and Archives, a special collections library that holds Mississippiana (state documents, oral histories, and other materials of Mississippi interest), genealogy materials, the university archives, rare materials, and the De Grummond Children's Literature Collection. Rather than having to hunt for headings to contribute, catalogers find that potential headings come up naturally in the course of their work. While contributing headings based on a library's original cataloging is valuable, headings can also be submitted for names found in the process of cataloging with member-input copy or with older DLC copy that predates the online authority file. Database cleanup projects are another source of headings. USM catalogers have a ready-made list of names in need of authority work in the form of "exceptions" lists of headings not matched by the Libraries' authority control vendor.

But Isn't There a Lot of Research Involved?

The amount of work involved in creating personal name headings may not be as great as some catalogers anticipate. While some research is required to avoid establishing the same form of name for two different people, the process of creating a heading for most personal names is quite straightforward, involving identification of the form(s) of name the person

uses in his/her works. Often, the works being cataloged, and the bibliographic utility's database to which the records will be added, are all that need to be consulted. The creation of corporate headings, and of personal names with cross references, can be more time-consuming. But for the effort required, the rewards are considerable: the cataloger creates a record that can be used in his/her library's local authority file and in libraries around the world. NACO participation is not solely a mechanism to increase catalog quality. Like all cooperative cataloging, it reduces duplication of effort. An authority record does not have to contain cross-references or lengthy explanatory notes to be useful. Even the simplest authority record, consisting of a name and citation of the work being cataloged, can be of value to other catalogers and can eliminate the need for the creation of a local record for the heading in their authority files.

What about Quotas?

Until recently, there was no quota for NACO participants, though the Library of Congress posted a *recommended* contribution level of 400 headings per year. In November 2002, LC began requiring 200 headings per year from large libraries and 100 per year from state, public, college, and special libraries.[1] If a library has concerns about being able to meet the quotas, particularly in these times of budget cuts, participation in NACO is still possible. The library can join a funnel project, a good way to contribute for libraries with smaller cataloging operations. Funnel participants create records and submit them through a project coordinator, who may or may not be located at their institution. The coordinator recruits members, hosts training sessions, and disseminates information to funnel project members. Coordinators may also serve as trainers and reviewers. LC has funnels organized by subject area (music, art); by location (state funnel projects); and by membership in a consortium. USM Libraries is the coordinator for the Mississippi Funnel Project, and plans to participate in the SACO African-American Subject Funnel Project after catalogers receive further training. For more information on funnel projects, see http://www.loc.gov/catdir/pcc/naco/funnelfaq.html#2. Comparative information on different types of NACO membership is also available at http://www.loc.gov/catdir/pcc/naco/funres.html.

Is NACO for My Library?

Before investigating NACO, there are several questions that a technical services manager may want to ask:

1. What types of material do we catalog? Does our workload include many materials for which we are unable to find DLC catalog copy? Do our collections contain material of local interest, non-print materials, or other likely sources of NACO headings?

2. How much local authority work are we doing? Are we creating authority records in our database?   Would those records be of use to other libraries if they were available through the LC authority file?

3. How many headings could we expect to contribute? Do we have staff and time enough to participate? (Remember, funnel participation is available for libraries that may not have extensive staff resources to devote to authority work.)

Conclusion

The Library of Congress authority file is a valuable resource consulted by catalogers every day.   For a cataloger, being a part of the creation and maintenance of that file is personally and professionally satisfying. For the library, there is the prestige of contributing to an international cooperative cataloging effort.

Reference

[1] NACO program FAQ (http://www.loc.gov/catdir/pcc/nacoprogfaq.html#11), viewed 1/4/03.

For further information on NACO: http://www.loc.gov/catdir/pcc/naco.html
http://www.loc.gov/catdir/pcc/nacoprogfaq.html#11

For information on the Program for Cooperative Cataloging:
http://www.loc.gov/catdir/pcc/

Guidelines for Book Reviews

The Southeastern Library Association is pleased to accept book review submissions for possible publication in *The Southeastern Librarian*. Guidelines are as follows:

- Title needs to have been published within the past two years.
- The work should have some connection to the Southern USA, either by content or the author's association with the south.
- Reviewer will obtain his/her own copy of the book. SELA is not able to provide a courtesy copy.
- Suggested length is 500-750 words. Shorter or longer submissions will also be considered.

Submissions will be judged on writing style, content and perceived interest to the readership of the journal. Please forward reviews and any questions to Frank R. Allen, editor, at fallen@mail.ucf.edu.

The Local Nature of Digital Reference

Teresa U. Berry, Margaret M. Casado, Lana S. Dixon

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Introduction

In response to the extensive availability of digital
library resources and the rising number of
remote users, many libraries now offer digital
reference services through e-mail and chat. The
growing use of interactive chat software with its
real time interactive capability has prompted
librarians to consider collaborative ways in which
to offer this service. A concern expressed
frequently in informal discussions of such
collaborations is how difficult it would be for the
staff at one library to answer questions for
another, considering that many questions tend
to be "local". Intrigued by the perception of
"local," librarians at the University of Tennessee
(UT) in Knoxville undertook a study of digital
reference questions received through chat and
e-mail to determine the percentage of questions
requiring on-site handling.

Literature Review

The extensive bibliographies on digital reference
service compiled by Bernie Sloan (2002) and
Joann Wasik (2003) provide an excellent
overview of this area. Much of the literature is
anecdotal—authors describe the implementation
of pilot projects and present data on the number
of questions, time of day for activity, and user
demographics. Although some studies mention
the types of questions encountered in the digital
environment, very few articles examine the
questions themselves in any great detail.
        Several studies on e-mail reference that
include a component of question analysis
provide some insight into the local nature of
digital reference, such as the Bushallow-Wilbur
et al. (1996) analysis of user demographics, use
patterns, and types of questions. While the
questions were categorized simply as reference
and non-reference, 19% covered questions

about the library's policies, services and catalog.
Hodges (2002) used descriptive statistics and
content analysis to assess user needs. Results
reflect the shift to remote access of library
resources with 23% of requests relating to
technical problems. In one of the few studies to
focus on question types, Diamond and Pease
(2001) analyzed the complexity of e-mail
reference questions received over a two-year
period in an academic library. Their results
suggest a strong local component with 35% of
the questions relating to the library's catalog,
databases, policies/procedures, and connectivity
while another 17% came from students needing
"starting-points" for an assignment.
        Chat reference service, a relatively new
phenomenon, has generated studies about
collaborative initiatives for offering 24/7 service.
Kibbee et al. (2002) found that their chat service
received a high proportion of questions related
to library resources and services and questioned
the feasibility of inter-institutional collaboration.
In a study that looked more closely at the local
component, Sears (2001) reported that 60% of
chat questions were related to the library's
policies, procedures, collections, or resources
and speculated this finding would have
significant implications for collaboration.
        Although these studies support the
perception that many digital reference questions
do have a "local" flavor, it is unclear if these
types of questions must be answered only by
the user's "home" library. This study attempts to
answer that question and address the
implications for collaboration.

Methodology

The University of Tennessee Libraries is a
member of the Association of Research
Libraries (ARL) and holds over two million
volumes. The main library and four branch
libraries serve approximately 25,500 students
and 1,100 faculty at a public, land-grant
institution. The University of Tennessee's digital
reference service includes both e-mail and chat.
For this study the investigators analyzed 694 e-
mail questions and 210 chat questions received
between August 2001 and April 2002 for their
local nature.

The investigators divided questions into four broad categories: policy and procedures, holdings, access, and factual (See Table 1 at the conclusion of this paper). Then each question was considered for the local aspect. Defining *local* posed one of the more difficult tasks of the study. Technically, any question related to a library's collection, services, and resources is local in the sense that it pertains to elements particular to that library, campus, and community. If one looks at questions from a collaborative viewpoint, however, the local nature of a question is only an issue if it requires on-site handling for completion.

For this study, the questions considered local were those that demanded on-site expertise, knowledge, or access to locally held resources. Questions readily answered by a search of the Libraries' catalog or web pages were not considered dependent on a response from a person located at the University of Tennessee Libraries. Referrals of questions to other departments required on-site handling only if they would be difficult for a non-affiliated person to determine. In this study the need for on-site knowledge was considered exclusively at the point of reference service, even though completion of a question might entail handling by another department. Questions designated as *on-site* needed a staff member at the University of Tennessee Libraries for an answer or appropriate referral. Questions designated *off-site* could be handled by a partner library. The investigators expected that the majority of requests for information would demand on-site attention.

Policy and Procedures

Policy and procedures represented 13% (*n*=119, Table 1) of the total number of questions examined and covered the guidelines and restrictions that govern how and for whom services and the collections are made available. Within this category queries pertained to circulation, document delivery, special collections, and collection development. Circulation and document delivery dominated this category and accounted for all but 18% of the questions concerning policy and procedures (Table 2).

Eighty-two percent of the 119 policy and procedures questions were designated off-site. Overall, the Libraries' web pages did a satisfactory job of providing the specifics to answer questions such as:

- What do I do if a book I need is checked out?
- How do I obtain borrower's privileges if not a student?
- How do I request a dissertation from another university?
- Will the Library loan theses to universities outside the U.S.?
- How does a faculty member have books delivered to his/her office?

Even requests for information that required putting the questioner in direct contact with another department were natural, simple referrals. Examples include:

- How does a person not affiliated with the University obtain copies of World War II documents that are part of Special Collections?
- How do I check the status of my borrowing activities?

The twenty-one questions designated on-site for policy and procedures included problem-related requests for assistance, recognition of names and relationships that would not be apparent to a non-affiliated person, and situations where the Libraries' web pages simply did not provide the needed information. No matter how detailed, web pages cannot possibly cover every conceivable scenario that users will describe.

UT students who were off-campus for a variety of reasons such as distance education, spring break, and fieldwork experience and who sought document delivery posed several problematic questions. Distance education students are eligible for special delivery options, but they do not routinely self-identify. UT librarians are familiar with the clues that would lead to a quick check of a UT student's status as distance education. A partner could not be expected to recognize such indicators.

Nine of the twenty-one on-site questions came from users who either wanted to purchase copies of UT master's theses or who sought information on the status of their orders. A partner librarian would not know that Interlibrary Services (ILS) photocopies UT theses for a fee, as the Libraries' web pages did not include this information, and referral to ILS was not obvious.

Another batch of on-site questions came from people not affiliated with the University and who had requested faxed or photocopied selections of pages from materials only available locally or regionally. Typically, the requester

lacked adequate information for an interlibrary loan transaction; thus the request needed additional attention to supply the missing bibliographic detail. Most often the librarian photocopied and mailed or faxed the needed item.

Of particular note are the potential difficulties posed by unfamiliar names and acronyms that a partner librarian from outside the state of Tennessee would not necessarily recognize. For example, on-site questions dealing with KUDZU requests would require a partner librarian to establish first what KUDZU is (an expedited interlibrary loan initiative among several southeastern academic libraries) and then how requests for books are tracked and documented for users. Acronyms such as ORNL, TBR, UTSI, and UTMC and our relationship to each of these entities pose no difficulty for a UT librarian. However, a partner would have to decipher the acronym, establish what, if any, connection exists to the University, and then determine which privileges would apply. UT's web pages spell out these relationships, but a partner would have to be willing to take the time to sift through the information. Familiarity in these cases makes a response simple and swift. A partner would find these queries at least moderately difficult to handle.

Overall, policy and procedure questions will pose the least amount of difficulty for a partner library, particularly when care is taken to create detailed policy and procedure web pages.

Holdings

Fifteen percent (*n*=135, Table 1) of the total number of questions focused on the contents of UT Libraries' collections. The holdings category was subdivided into four types: books, serials, UT dissertations, and other (Table 3). Typical questions include the following:

- Does the library have a particular title—book, journal, etc.?
- What materials does the library hold on a certain subject?
- Does the library have this issue/edition?
- Is this title available in a specific format?

Fifty-six holdings questions concerned serials, which included journals, magazines, and newspapers as well as campus telephone directories, UT course catalogs, and other serial titles. Most of these questions could be answered by searching the catalog, but twelve required on-site handling. Some questions revealed problems with UT's periodical subscriptions. Several patrons asked about the University of Tennessee's yearbook, in which case knowing that the title is *The Volunteer* is essential before searching the catalog. Some questions required visual inspection of the shelves to confirm the holdings information due to erroneous or incomplete information in the catalog. A few questions involved determining the availability of specific periodicals found within UT's electronic full-text databases. Unless the partner institution has access to the same databases, these types of holdings questions would be difficult to answer.

Fourteen questions were about theses and dissertations completed at the University of Tennessee. Six questions had to be answered on-site, primarily because the theses and dissertations had not arrived in the library yet or were waiting to be cataloged. When the thesis could not be located in technical services, the next step involved examining commencement programs to determine if the student had actually graduated.

Thirty-seven of the forty questions relating to books in the Libraries' collection could be answered off-site by searching UT's web-based catalog. Only three questions required on-site answering because the catalog did not accurately reflect the status of the item, or the librarian had to use an in-house version of the catalog to search by call number, an option currently not available through the web interface.

The twenty-five holdings questions in the category designated as *Other* had the largest proportion of on-site questions, with seventeen needing someone at UT to answer them. This category included a wide variety of materials such as maps, video and sound recordings, ERIC documents, data sets, and aerial photographs. These items were largely uncataloged and often relied more on manual searching.

Librarians from other institutions could easily answer 72% of the holdings questions with a search of the UT Libraries' online catalog. However, 28% of holdings questions posed problems for three primary reasons:

- The materials were uncataloged.
- Someone physically handled a print resource to answer the question.
- The online catalog did not provide enough information to answer the question

Uncataloged materials and electronic journals will present the biggest challenge to collaboration. Retrospective cataloging may not be a high priority given the constraints on budgets and personnel. Although electronic journals are included in the catalog, publishers and aggregators are constantly changing the content of their online collections, making it difficult to keep holdings information current.

Access

Comprising 16% (*n*=149, Table 1) of the total number of questions received, access questions concerned how to connect—or problems with connections—to the Libraries' electronic resources, such as the catalog, databases, online reserves, and electronic journals and books (Table 4). Forty-eight (32%) of the 149 access questions required on-site handling. They included difficulties with malfunctioning equipment, campus network problems, and disruption of services from vendors. Interesting to note is that many requests for help came from users who were familiar with the resource and could recognize a problem. They typically wanted confirmation of the problem and an estimated time for resolution.

Nine of the twenty-six questions about reserves required on-site help. Examples of the occasional, yet essential, need for local information included knowledge of server problems caused by power outages, familiarity with the organization and location of reserve readings, and awareness of alternatives to make uncooperative files print or play.

The two on-site questions about the catalog dealt with local quirks of the online public access catalog (OPAC) such as the need to ignore the browser's navigation buttons and the ability to troubleshoot error messages. The ten on-site questions concerning electronic books and journals dealt with subscription problems and server downtime.

The twenty-seven questions about databases that required on-site knowledge dealt with subscription problems, changes in vendors, servers being down, and availability of databases among the various UT system libraries. Questions were often variations of, "Why do I get this message?" or "Why can I not get in now?"

Questions that could be easily handled off-site by partner libraries included inquiries about usernames and passwords for accessing the databases, requests for help in finding and viewing online reserves, and questions about searching the catalog. The Libraries' web pages deal well with providing information about reserve readings, passwords, remote access, database licensing restrictions, and services available to remote users; therefore, many of these questions were considered manageable by off-site librarians.

Factual

The investigators divided factual questions into five groupings: the University of Tennessee Libraries, the University of Tennessee, Knoxville and Knox County, Tennessee, and Other (Table 5). Most questions were of the ready-reference type, although not necessarily brief in nature. Other questions served as beginning points for writing assignments or research projects—requests for database recommendations or for help in getting started. Comprising 55% (*n*=501, Table 1) of the total questions, factual constituted the single largest collection of requests.

Factual–UT Libraries. Seventy-two questions (Table 5) concerned the UT Libraries and included queries about the buildings, location of call numbers, location of specific departments, contact information, availability of tutorials, where to make photocopies, cost of printing, and administrative specifics about selected services. Fifty-two of these questions required on-site knowledge.

Twenty-three of the on-site queries came from librarians at other institutions and from information science students. The majority asked for information about the UT Libraries' selection of chat software and our experience with running a chat reference service. Others were curious about the addition of a Starbucks to Hodges Library, history of the Libraries' OPAC implementation, vendor and producer information for databases offered by the UT Libraries, and information on our serials management vendor. Clearly, these questions required firsthand knowledge.

A source of several digital reference requests was locating books in the stacks. Although much effort has gone into providing call letter areas for the stack floors in tutorials and via a web-based stacks locator, this information is difficult to find within the Libraries' web pages.

Surprisingly, 72% (*n*=52, Table 5) of the factual questions about the Libraries required on-site handling. The investigators expected the Libraries' web pages to provide most answers, but much of the information sought was situational ("Is the graduate computer lab open yet?"), experiential ("Are you pleased with your choice of chat software?"), and local to the point that a response required strong familiarity with the buildings ("What is the name of the author whose bust is near the centaur?").

Factual–University of Tennessee. The sixty-two (Table 5) factual questions about the University varied widely but tended to fall into the following groups: people, academic programs, student services, campus computing, sports, and University history and traditions.

Eighteen questions were about people with roughly one-half being designated as on-site. Requests for current contact information were easily answered by the University's web directory and by pages for individual departments. On-site questions required using materials only available locally, such as old yearbooks, student directories, and salary listings.

The University's web pages handled very well the twenty questions about sports, university history and traditions, academic programs, and student services. Referrals were easily discerned for the most part. The three on-site questions required use of in-house resources such as old course catalogs and a published history of the University that would not necessarily be held by a partner library.

The nine requests for help with campus computing included problems with UNIX and e-mail accounts, difficulties with online registration, and confusion related to the University's course management system. The University web pages provided answers for all but three questions; those requiring on-site handling were either worded so vaguely as to make an appropriate referral very difficult or required familiarity with a specific system such as Blackboard.

Of the remaining fifteen University-related questions, the six designated on-site made use of local resources such as University-generated documents or required several phone calls to identify the office or person best able to supply an answer. Examples of on-site requests concerned the number of students who move out of state upon graduation, the percentage of students who commute, and the Nobel Prize winners affiliated with the University.

By and large, the University's web pages did a good job of providing the needed information, particularly when the questions related to the present time such as, "Who is the incoming president of the University?" Vaguely worded questions that required interpretation ("I would like to print out my schedule.") and questions about the past that went beyond the more popular sorts of queries ("Why are the school colors orange and white?") were the ones typically designated on-site.

Factual–Knoxville and Surrounding Area. Of the ten questions (Table 5) about Knoxville and the surrounding area, six required on-site handling or specific knowledge of local resources. Access to historical accounts about Knoxville and resources of limited availability proved essential for this sub-category. On-site questions required finding histories of local place names, information about the 1982 World's Fair, and material written by a local journalist.

The four off-site questions were either easy referrals or were answered using widely available resources. These requests dealt with information about local businesses, Knoxville during the Civil War, and statistical information.

Tennessee. Nine of the thirty-eight questions (Table 5) about Tennessee required special handling, extensive knowledge of local resources, or the use of print or microfilmed materials not widely available outside of the state of Tennessee.

On-site questions included queries about Norris Dam, the family of a Tennessee opera singer, and the history of Tennessee's medical schools. In order to make appropriate referrals in these instances, familiarity with local resources, such as the McClung Collection in the Knox County Public Library and the Tennessee Valley Authority library located in Knoxville, proved advantageous.

The remaining twenty-nine questions about Tennessee were easily referred or were answered using resources that are generally available in most libraries. Common examples of these questions include locations and spellings of names of towns in Tennessee, state data for school funding, school curriculum standards, information about former governors of Tennessee, and existing state laws.

Other Factual Questions. The 319 factual questions (Table 5) falling into the *Other* grouping covered all imaginable topics—everything from the Chinese symbols for the four

seasons to a pediatric height and weight chart. Roughly 97% of the requests for information in this group could be answered potentially by a partner librarian. As expected, the number of questions requiring on-site handling was very low, specifically, nine questions. They most often involved physical consultation of a book in the collection (frequently a book not held by many libraries) or follow-ups to previous questions that would require access to prior e-mail exchanges or chat transcripts.

Included in off-site *Other* were 120 questions from UT students seeking resource recommendations for a particular topic or asking for help with how to begin collecting information for an assignment. Although this type of question certainly has a definite local flavor, the investigators decided not to designate these as on-site. The expectation is that a partner librarian would be willing to provide responses framed in the context of print and electronic resources accessible to UT faculty, staff, and students. Important here is the assumption that a partner would take the time to consult the UT Libraries' catalog, menu of databases, and locally created subject guides. Database selection represented the overwhelming majority of recommendations sought by students (38% of *Other*) and included the single largest grouping of chat exchanges.

Conclusion

With 682 questions (75% of the total) relating to access, holdings, policy and procedures, UT Libraries' databases, and information about the University of Tennessee and surrounding community, the *perception* of local is quite strong. Only 23% of the total number of questions demanded on-site knowledge, expertise, or access to resources held by the UT Libraries. Analysis of the 904 chat and e-mail reference requests did not reveal the expected high percentage of questions that required

exclusive handling or referral by a UT reference librarian.

The results indicate that 77% of the digital reference questions could be handled reasonably effectively by partner librarians at another institution and suggest that the on-site aspect is not strong enough to inhibit collaboration significantly. The 23% that would require on-site handling would more than likely not all arrive on the partner's assigned shifts; there would be some distribution of those on-site questions, making on-site handling less than 23% of the total load.

This study suggests that several factors contribute to successful partnership. To collaborate effectively partners should

- Create well designed and organized web pages with clear navigation and search options
- Become well acquainted with each other's web sites, knowing where to find information about circulation policies, etc.
- Shape answers in terms of the other library's resources and students
- Review questions with the goal of providing information needed by the other library to be made available on a web page or in a knowledge base, a database of reference questions and answers
- Communicate information about thorny class assignments
- Provide status reports on remote access problems.

Collaborative digital reference is not simply a matter of one library turning its chat service off and redirecting users to the next available partner library. Success depends, in large part, on preparation and communication. Only by working closely with each other can participants in collaborative reference ensure that users receive the best service possible—service that retains the local touch.

Table 1. Number of Questions by Type

Category	E-mail	Chat	Total
Policy/Procedures	105	14	119
Holdings	106	29	135
Access	122	27	149
Factual	361	140	501
Total	694	210	904

Table 2. Policy and Procedures Questions

Category	E-mail	Chat	Total
Circulation	38	3	41
Document delivery	39	17	56
Special collections	13	1	14
Collection development	8	0	8
Total	98	21	119

Table 3. Holdings Questions

Sub-Categories	Off-Site	On-Site	Total
Serials	44	12	56
Books	37	3	40
Other	8	17	25
UT Dissertations	8	6	14
Total	97	38	135

Table 4. Access Questions

Sub-Categories	Off-site	On-site	Total
Databases	65	27	92
Reserves	17	9	26
E-journals/E-books	11	10	21
Catalog	8	2	10
Total	101	48	149

Table 5. Factual Questions

Sub-Categories	Off-site	On-site	Total
UT Libraries	20	52	72
UT	41	21	62
Knoxville	4	6	10
Tennessee	29	9	38
Other	310	9	319
Total	404	97	501

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Assessment in Libraries: Practical Approaches for Creating a Continuous Assessment Environment

June 2004, Orlando, Florida

SELA is organizing a one-day workshop for academic librarians entitled "Assessment in Libraries: Practical Approaches for Creating a Continuous Assessment Environment", to be held in Orlando, Florida in late June, 2004.

Scheduled presenters Dr. William N. (Bill) Nelson, Professor and Library Director at Augusta State University in Augusta, and Dr. Robert W. (Bob) Fernekes, Information Services Librarian/ Business Information Specialist at Georgia Southern University, have facilitated numerous workshops on implementing the Standards for College Libraries (ACRL, 2000).

As details about the workshop become available, they will be posted to the SELA website: http://sela.lib.ucf.edu/.

Meeting the Challenge: Training an Aging Population to Use Computers

Carol Bean

Older adults present a special challenge to libraries offering computer training.   Many of those seeking training have little, if any, prior experience with the concepts and skills necessary to use computers, yet their ability to learn those concepts and skills is hampered by the aging process. This article summarizes the factors in aging which most affect learning computer skills, and how those factors can be mitigated.

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Introduction

In September of 2001, the North County Regional Library of the Palm Beach County Library System opened a computer lab to offer hands-on computer training classes to patrons. The area demographics include a large proportion of older, retired adults, generally from the middle and upper-middle classes. Not surprisingly, approximately eighty percent of the training class participants have been over 55, with little or no computer experience. We found a unique challenge in tailoring our material to fit the special learning circumstances of this group, many of whom came to us after finding that other basic computer classes offered in the community were too difficult for them.   A search of library literature provided little insight into the problems we were having, so the literature search was broadened. This article summarizes the results of that research, as well as the experience gained in implementing ideas gathered from the literature of research on aging and computer training.

The 1998 government study, "Falling Through the Net,"[1] and the 2001 Pew Internet Study, "Wired Seniors: A Fervent Few, Inspired by Family Ties,"[2] identified the older adult population as the fastest growing segment of Internet users. This segment is most likely to have missed the electronic revolution, yet it is becoming more and more a necessity for them to be able to use computers and computerized equipment, such as automatic teller machines and voting machines. For those who did not experience computers as part of their work environment, there is a steep learning curve, and until recently, more reason to ignore computers than to embrace them.[3] But even those who encountered computers before they retired will be at a disadvantage if retirement came prior to widespread use of graphical user interfaces and the mouse, since different skills are required for graphical user interfaces than were used in the earlier text-based systems.

As many librarians have learned, older adults now seem to be flocking to library classes on basic computer training and using the Internet,[4] and as many of us have also learned, they present a special challenge to trainers.[5] Besides the obvious physical obstacles encountered with using a mouse, there is the ubiquitous patron who asks a question about what was just covered as if it had never been mentioned, or the one who demands to know, "but what is this good for?" Some keep coming back for the same classes until we wonder if retention is an additional skill to be learned.

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[1] Department of Commerce, *Falling Through the Net: Toward Digital Inclusion, A Report on Americans' Access to Technology Tools*, (Washington, D.C.: NTIA, October 2000), [http://www.ntia.doc.gov/ntiahome/fttn00/contents00.html] Accessed June 11, 2002.

[2] Susannah Fox, et al. *Wired Seniors: A fervent few, inspired by family ties*, (Washington, D.C.: Pew Internet & American Life Project, September 9, 2001), Accessed March 20, 2002.

[3] Fox, et al.; Philip J. Trocchia and Swinder Janda, "A Phenomenological Investigation of Internet Usage Among Older Individuals," *Journal of Consumer Marketing* 17, no. 7 (2000): 605-616.

[4] Connie Van Fleet and Karen Antell, "Creating CyberSeniors: Older Adult Learning and its Implications for Computer Training," *Public Libraries* May/June (2002): 40; Kristina Daily-Brothers, "Computing for Seniors at the Brownsburg Public Library." *Indiana Libraries* 16, no. 1 (1997): 21-23; Trish Clarkson and Sally Bradford, "It's Never Too Late to Learn How to Surf the Net," The Library Association, Accessed June 5, 2002.

[5] Van Fleet and Antell, 49; Mike Williams and Elaine Williams. "Teaching ICT Skills to Third Agers," *Learning in Later Life*, (October 29, 1999), Accessed December 16, 2002.

Malcolm Knowles identified basic strategies for educating adults, which he termed "Andragogy," as distinguished from "Pedagogy."[6] Most notably, those strategies address motivation and relevance. Adults are self motivated and self-directed. They seek to learn what is relevant to their lives. In computer terms, this means they will not be interested in learning to use a computer until they experience a relevant purpose for it, and they will learn only what is of immediate use to them, such as how to view an e-mail attachment. This is obviously where training older adults begins, but if that were the sum of what is necessary, there would not be twenty years of research identifying exactly why the older population is having difficulty learning computer skills.

There is a stubborn misconception, refuted by decades of research, that older adults cannot learn to use computers. Yet the declaration that even the very old can be taught computer skills may seem like news to those who have experienced the frustration of trying to teach those skills to a class of older adults. What exactly is the problem? There are several, directly related to the aging process: deterioration of physical aspects such as hearing, vision and motor control; declines in attentional processes; and cognitive slowing. Yet research shows that despite these age-related declines older adults can learn the concepts and skills necessary to use computers.[7]

Methods to improve the learning curve for older adults have also been the subject of research.[8] Summarizing the results of this body of research, two prominent researchers note,

"There is a need for age-specific training; researchers have uncovered techniques for developing such training and have tested the benefits of that training."[9] Where training classes or programs are already in place, especially training for computer skills, attention to age-related issues may be all that is needed to improve effectiveness with older adults. Our experience confirms what one researcher concludes: "The learning performance of older people can be improved by manipulation of training technique."[10]

Physical Problems

Differences in the way younger and older adults learn involves the aging process. The most obvious difference is the physical aspect. As we age, there are physical declines in mobility, motor skills, vision, and hearing. The decline in motor skills affects the ability of older adults to use a keyboard and to control a mouse device. For example, the double-click function of a mouse will not work if the mouse is moved while clicking. Many older adults, however, have difficulty keeping the mouse stationary while trying to perform a double-click. Arthritis can affect their ability to hold the mouse and consistently click on the correct mouse button. Tremors and associated declines in motor ability caused by neural noise (signals generated within the nervous system unrelated to actual stimulus) affect their ability to accomplish fine-motor tasks such as positioning a cursor or holding the mouse still during a double-click task.[11]

Some of these difficulties can be alleviated or overcome with adaptive technology, which addresses the specific physical problems encountered using computers. For example, a mousing device which remains stationary, such as a trackball, may be easier for some older adults to maneuver than a regular mouse, which must be moved. Just because the input devices are difficult for a student to use, however, does not mean adaptive technology should be offered during training to make computer use easier. What will they encounter outside of class? If

[6] Malcolm S. Knowles and Associates, *Andragogy in Action: Applying Modern Principles of Adult Learning* (San Francisco: Jossey-Bass Publishers, 1985), 14.

[7] Sara Czaja, "Computer Technology and the Older Adult," in *Handbook of Human-Computer Interaction,* 2nd, Completely Revised Edition (New York: Elsevier, 1997), 800.

[8] Ibid.; Katharina V. Echt, Roger W. Morrell, and Denise C. Park, "Effects of Age and Training Formats on Basic Computer Skill Acquisition in Older Adults," *Educational Gerontology* 24, no. 1 (1998): 3-25; Lisa A. Hollis-Sawyer and Harvey L. Sterns, "A Novel Goal-Oriented Approach for Training Older Adult Computer Novices: Beyond the Effects of Individual-Difference Factors," *Educational Gerontology* 25, no. 7 (1999): 661-684; Brett D. Jones and Ute J. Bayen, "Teaching Older Adults to Use Computers: Recommendations Based on Cognitive Aging Research," *Educational Gerontology* 24, no. 7 (1998): 675-689.

[9] Wendy Rogers and Arthur D. Fisk, "Human Factors, Applied Cognition, and Aging," in *The Handbook of Aging and Cognition,* 2nd ed. (New Jersey: Lawrence Erlbaum Associates, 2000), 585.

[10] Czaja, 803.

[11] Czaja, 806; Rogers and Fisk, "Human Factors, Applied Cognition, and Aging," 566-567.

they do not have a computer, but instead will be using computers in the library or somewhere else, they will be better prepared by training which uses the devices they will encounter. If the primary computer they will be using is their own, or one they plan to buy, students should be advised that alternative mouse devices are available, but are not standard equipment. Given the fact that adaptive devices will cost extra for their own computer, many seniors choose to learn to use the standard mouse, even if it is initially more difficult.   Since part of learning to use a mouse device is understanding the concept of pointing and clicking in a graphical user interface, we believe initially learning the concept and skill on a mouse which they will typically encounter outside their own home is more valuable than offering an alternative which they may never encounter again.

The double-click operation is one of the most problematic for older adults. We have found that initially instructing older adults to click once to highlight an icon and then to press the Enter key to open the corresponding program gives them an easy alternative to remember. When we subsequently teach them about double-clicking, we remind them about pressing the Enter key if nothing happens when they double-click. Usually, just having that knowledge is enough, although most will still try to master double-clicking. Another strategy, useful for those who have difficulty holding the mouse still while clicking, is to show them how to use one hand to hold and move the mouse and to use the other hand to click the buttons. It may seem counter-intuitive, but for some older adults it is a welcome solution which enables them to continue.

Age-related changes in vision begin as early as middle age. As vision declines and older adults begin using bifocal or trifocal glasses, viewing the monitor becomes problematic because of the viewing distance, which may be between their close and distant vision points.   Glare is also more of a problem for older adults due to changes in vision. Adjusting the monitor's tilt can reduce glare, but we have found that older students usually do not realize the monitor can be moved or adjusted. If they see the monitor moved and adjusted for them as they arrive for class, they realize a problematic monitor elsewhere can also be adjusted.

Age-related changes to the eye also affect the quality and amount of light that is seen, so that color perception is affected.[12] Distinguishing between blues and purples becomes more difficult, and cataracts will make white appear yellow.   The more contrast there is on a screen, the easier it will be for seniors to read. Unfortunately, when using World Wide Web sites in training, there is not much that can be done with the color combinations a site uses, or the standard colors of links and visited links, so it is important to keep these visual factors in mind when selecting web sites to use in training, and when designing web-based training. Changing the screen resolution can help, but if that option will not normally be available to them, it again becomes an issue of what they will be using after the class.

For older adults, written instructional material is a major part of the learning process. Two prominent researchers in the field of computer instruction to the elderly, Morrell and Echt, have argued that the lack of adequate printed instructions is a major inhibitor to seniors learning to use computers.[13] Drawing on their own research and the body of research on teaching computer skills to seniors, they advocate using both verbal and printed materials in training older adults to use computers. Our own experience, as well as others',[14] verifies their conclusions. Written instructions, however, must be readable and understandable to older adults to be useful. In terms of vision related declines, text size and layout are critical. Research summarized by Morrell and Echt indicates font size 12 to 14 is preferable to smaller size fonts. A sans serif font like Helvetica seems to be the easiest to read.   To accommodate vision related declines, as well as attentional and cognitive issues, discussed below, the format and structure of written materials should include relevant illustrations, presented in discrete segments with simple language.

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12 Roger W. Morrell and Katharina V. Echt, "Designing Written Instructions for Older Adults: Learning to Use Computers," in *Handbook of Human Factors and the Older Adult* (New York: Academic Press 1997), 348
13 ibid., 338.
14 Sarah Muller, "Design of a novices' computer course for older adults," (honor's thesis, St. Mary's College of Maryland, 2001); Dennis Mark Roberson, "Selected Case Studies of Senior Citizen Computer Technology Implementation and Training Through Non-Formal Instructional Techniques," (master's thesis, New Mexico State University, 2000).

Age-related changes to the ear and central auditory nervous system affect not only what is heard, but also how well it is processed. Within the range of hearing, the higher pitches are the first to be negatively affected with age. The pitch of a typical male voice is ideal, but since it is the extremes which are most impacted, a woman's voice which is not in the higher pitches will be just as discernable to those with age-related hearing loss.[15] In addition to pitch, the combination of increased neural noise and decreased ability to suppress external noise (stimulus which is unrelated to the attentional focus) degrades speech perception as adults age.[16]

Declines in attentional processes, discussed below, also affect the ability to correctly interpret what is heard. Slow, distinct speech is imperative, as well as blocking out, or at least minimizing, external noises. Even quiet chatting between students in an otherwise quiet room will have a negative impact on how much can be processed and retained by the others. Finally, since older learners need slightly more time to process speech and the new information they are hearing, it is important to allow time for processing what is said.[17]

Attentional Processes

Attentional processes involve selective attention, inhibition, and control of the attentional focus. The practical effects of declines in attentional processes are twofold: interference with the ability to focus only on the task at hand, and making incorrect inferences. Since one's working memory involves using what is in the attentional focus, declines in inhibition (the ability to exclude not only distractors, but irrelevant or inappropriate content) will affect the ability to learn and retain new information. The older adult must, in effect, find the focal point and maintain it while excluding pre-existing knowledge which points to something else. In our experience, even following explicit, step-by-step, printed instructions can be an attentional challenge for some older adults.

Computer training requires learning new concepts and associations, such as "icons" and "shortcuts." But declines in attentional processes make it more difficult to exclude prior associations with these terms, and replace them with the new associations. The experience of older students learning new concepts and associated tasks would be similar to going to a reunion and finding everyone's name has changed. As two researchers in aging, Rogers and Fisk, have noted, "generally, older people have more difficulty...modifying existing concepts."[18] However, the more they hear the new associations, the better their retention will be. Priming, a procedural memory process which is not affected by age, occurs when a term or concept is introduced briefly for later recall. Research indicates priming will increase retention in older adults.[19] Repetition, especially when incorporated in practical experience, is the key to retention. Cues, such as "cheat sheets" or labeled graphics which draw attention to screen locations, have also been found to be effective,[20] just as name tags would help at the reunion where everyone's name has changed.

External distractions which interfere with the attentional focus can be environmental, such as noise or temperature, or attention related, such as a visually busy web page. In either case, processing new information, which is already negatively affected by age, is further taxed by the distractions. In their article, "Issues in Training Older Adults to Use Computers," Kelley and Charness, two prominent researchers on aging, note, "attentional resources [are] especially important for unfamiliar tasks or [when it is] uncertain where attention should be focused."[21] We have found that when using printed instructions and handouts, brief and concise directions, using relevant graphics with easy to read text, in a simple step-by-step format, help seniors maintain their attentional focus.

Temperature can be an attentional distraction to older adults due to thinning skin and decreased circulation which makes them more sensitive to cooler temperatures. A room temperature which may be comfortable for younger adults can be an uncomfortable

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[15] James L. Fozard and Sandra Gordon-Salant, "Changes in Vision and Hearing," in *The Handbook of the Psychology of Aging* 5th ed. (San Diego: Academic Press, 2001), 253.
[16] Ibid.
[17] Jones and Bayen, 677.

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[18] Czaja, 805.
[19] James H. Howard and Darlene V. Howard, " Learning and Memory," in *Handbook of Human Factors and the Older Adult* (New York: Academic Press, 1997), 17-18.
[20] Czaja, 802.
[21] Catherine L. Kelley and Neil Charness. "Issues in Training Older Adults to Use Computers," *Behaviour & Information Technology* 14, no. 2 (1995): 107-120.

distraction to older adults. Conversely, a room which is uncomfortably warm for the trainer may be just right for seniors. To minimize this element of distraction it is important to be aware of what the comfortable temperature range is for older adults in the class and to adjust the room temperature accordingly.

Additional factors in attentional issues are the length of a class and the time of day it is given, as well as the amount and level of new material presented. New computer users need small doses initially, and extra time to internalize what they are learning. One hour seems to be the ideal class length, but we have found classes that teach the most basic skills can be extended up to two hours to allow for additional practice time. When concepts and terminology are new, repeated exposure increases recall, but the amount of new material which can be recalled later is still limited. Research has also found memory processes in older adults tend to be best in the morning hours.[22] Our own experience indicates a preference by senior adults for classes earlier in the day.

Cognitive Slowing

There has been significant research in the last twenty years on cognition in older adults and its effect on learning computer skills.[23] While everyone notes a difference in learning capabilities between younger and older adults, identifying the causal factors has been difficult. An often-cited study by Morrell and Echt identifies four cognitive processes which affect learning computer tasks: text comprehension, working memory, spatial visualization ability, and processing speed.[24]

Text comprehension, or text recall, is the ability to recall an idea or concept which has been recently read. As noted above, the level of comprehension will be affected by the extent to which prior experience is associated with an idea or concept. Two researchers found that the

richer lifelong experiences older adults draw upon interfered with text comprehension by negatively impacting working memory and attentional processes.[25] Their study relied on complex expository passages but confirmed an earlier study which found a connection between attentional processes and text processing. In effect, the ability of older adults to comprehend the new concepts necessary to learn to use computers will be affected by their ability to inhibit prior associations and experience. For example, the term "drag" represents a very different concept to older adults than what it represents in a graphical user interface, which interferes with their ability to process the new concept. Because of this, using simple, clear language with illustrations or animation in instructional material works much better for older adults than lengthier, explanatory text.

Working memory is affected both by attentional processes and by processing speed. The age-related decline in processing speed is the common factor in all aspects of memory. While certain memory systems, such as semantic and procedural memory remain stable with age, they are still affected by processing speed. Put simply, with cognitive slowing there is "limited time in which relevant operations can be successfully executed, and products of early processing may no longer be available when later processing is complete."[26] The practical effect is that older people require more time to process new information, more practice time to learn new tasks, and consequently more training time. Because there are several ways people learn (listening, reading, seeing, doing, writing, or combinations of these), allowing time for older adults to incorporate their own method of learning can increase what is retained.

Another factor which has been identified recently as a significant predictor of performance in computer training is spatial memory, especially with the widespread use of the mouse and graphical user interface.[27] The mouse operates on a different plane from the computer screen, increasing the complexity of the task of selecting objects on the screen.[28] But spatial ability, like working memory, declines with age. As Morrell and Echt note, "older adults are

[22] Cynthia P. May, Lynn Hasher, and Ellen R. Stoltzfus. "Optimal Time of Day and the Magnitude of Age Differences in Memory," *Psychological Science; a Journal of the American Psychological Society* 4, no. 5 (1993): 326-330.

[23] For a review, see Patricia A. Larkin-Leffers, "The Older Adult and Public Library Computer Technology: A Pilot Study in a Canadian Setting." *Libri* 50, no. 4 (2000): 225-235.

[24] See, for example, Czaja, 804, and Rogers and Fisk, "Human Factors, applied Cognition, and Aging," 569.

[25] Karen Zabrucky and DeWayne Moore. "Elaborations in Adults' Test Recall: Relations to Working Memory and Text Recall," *Experimental Aging Research* 21 (1995), 156.

[26] Jones and Bayen, 677.

[27] Czaja, 803.

[28] Morrell and Echt, 352.

inordinately affected by increases in task complexity...[especially] where verbal and spatial are combined." To minimize the effects of aging on the ability to learn to use graphical user interfaces, it is important to simplify instructions and concepts as much as possible at the beginner level, until mousing skills become automatic and using a mouse is no longer a task to be processed.

Moderating Factors

Since computer tasks and the effort to learn them primarily involve the same mental processes most affected by aging,[29] it may seem a wonder that older adults can be trained on computers at all. However, although age-related declines begin in middle age, the severity will vary by individual. All of these age-related factors are moderated by health, attitude, existing abilities, expertise and automaticity (previously established automatic processes).[30]

Health and attitude are major moderating factors. General health and level of activity are documented factors in the effects of aging.[31] It has been observed, for example, that even very old adults who exercise regularly do not experience the same degree of cognitive slowing as those who are less active.[32] Attitudes about computers can influence the motivation to learn to use them, and those attitudes can be affected by social factors, such as the experience of being left "out of the loop" without e-mail.[33] Prior experience on a computer, especially when positive, also favorably affects attitudes and the outcome of subsequent training.[34]

To the extent existing abilities, expertise and automaticity can be used in the new computer skills which must be learned, they will reduce the effects of aging. For example, learning to use the keyboard may be easier for a former typist. On the other hand, adjusting to the different keys and added keys may actually be more difficult for a former typist because of

pre-existing automatic processes learned on a former keyboard layout, which must be unlearned.

In fact, there is a considerable amount of knowledge and skills which moderate the aging process. While working memory and processing speed decreases, older adults often make up for the difference by drawing more on their available conceptual and world knowledge, known as semantic memory, which is not affected by the aging process. Procedural memory, of which automatic processes are a part, also is not affected by age. As one researcher put it, "the ultimate effects of age on any given learning task will depend on the interplay of these systems"[35]

Factors which have been demonstrated to improve the learning performance of older adults include goal setting and partnering. Goal setting, a technique in which learners participate in setting goals for tasks, has been shown to improve computer training results for older adults in specific tasks and in the entire course outcome.[36] When they participate in defining the goal for a particular task or lesson, they see in advance the level and scope of what they will be learning. As they assess their progress toward each goal, they receive positive feedback on their abilities. Partnering learners with similar skills and experience during training has also been found to be effective, due to social interaction and reinforcement.[37]

Summary

There are specific, identified techniques which address the age-related issues of learning to use computers, both globally and at specific levels. On the global side, research indicates the most successful training techniques are those which reduce cognitive demands.[38] Specific techniques which address the issues involved in training older adults to use computers include:

- Make the class relevant. Adults, especially older adults, need a direct correlation to their lives to maintain

[29] Czaja, 800.
[30] Howard and Howard, 20-23.
[31] Ibid., 22.
[32] Ibid.
[33] Van Fleet and Antell, 149.
[34] Jennifer L. Dyck and Janan Al-Awar Smither, "Age Differences in Computer Anxiety: the Role of Computer Experience, Gender and Education," *Journal of Educational Computing Research* 10, no. 3 (1994), 246; Czaja, 799.

[35] Howard and Howard, 23.
[36] Hollis-Sawyer and Sterns, 661-684; Czaja, 803.
[37] Elaine Zandri and Neil Charness, "Training Older and Younger Adults to Use Software," *Educational Gerontology* 15 (1989), 627.
[38] Rogers and Fisk, "Human Factors, Applied Cognition, and Aging," 569.

interest. When they do perceive a direct connection to their lives, interest and learning will be instantly enhanced.

- Allow extra time to accomplish even simple tasks. Many older adults take computer training classes before getting a computer. Without the opportunity to practice new skills as they learn them, their new abilities will not be retained.
- Adjust monitors before each class. Take the time to set the monitor for each individual within a comfortable viewing range, and adjust the tilt to minimize glare.
- Speak slowly. Since higher pitches are the first to be lost in aging, the lower the pitch of the trainer's voice, the better.
- Speak clearly, with frequent pauses. Older learners need more time to process speech and the new information they are hearing.
- Use precise, unambiguous terms. Although relating new processes or techniques to prior experience is helpful for conceptual learning, always be aware of prior associations which may interfere with the cognitive processes of learning new terms.
- Locate the training in a room or area conducive to learning for older adults. The optimum location is a relatively warm room well away from noise distractions. If this is not possible, at least be aware of the attentional hurdles you will be up against.
- Keep the length of the class manageable for Seniors, based on the amount of new information they will be getting and allowing extra time to practice new skills.
- Set the time for the class as early in the day as possible. For older adults, the morning hours are generally their optimal time of day for memory processes.
- Provide printed material in an easy to read font, with appropriate graphics. Instructions should be comprehensive and explicit: do not assume they will retain knowledge of prior steps.
- Involve Seniors in their training. To whatever extent possible, have older students participate in goal setting and feedback for specific tasks, and in the entire course outcome.
- Partner learners with similar abilities, to increase motivation and reinforcement.

Conclusion

Understanding the factors in aging that affect the ability of adults to learn computer skills is the first step to designing and teaching computer classes for older adults. There is a considerable body of research on the problems associated with older adults learning to use computers, as well as techniques which can be implemented to moderate the effects of aging. While many of the mental processes needed for learning deteriorate with age, some, such as automatic processes and semantic memory, do not. "The challenge," as two researchers put it, "is as much to design for what is retained in aging as for what is lost."[39]

Due to the variety of differences in abilities and needs among the aging population, there is no simple formula for training older adults to use computers. Because of individual moderating factors such as health and attitude towards technology, there is no typical older adult. Among those who have attended our classes, we have found a wide variety of cognitive, attentional, and physical abilities. Our most successful classes have been those where we implemented the strategies and techniques summarized above. As we met the challenge of training older adults, the training outcome for all of our students improved. Our experience has verified what two researchers concluded: a byproduct of attending to age-related issues is improved learning for younger adults as well.[40]

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[39] Howard and Howard, 23.
[40] Rogers and Fisk, "Human Factors, Applied Cognition, and Aging," 568.

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The following two papers were presented at the 2002 SELA/South Carolina Library Association Joint Conference in Charleston, South Carolina, as part of the "New Voices" program, sponsored by the University and College Libraries Section (UCLS) of SELA. The purpose of New Voices is to support the professional development efforts of newer librarians to the profession. Earlier in the year UCLS sent out a call for papers from librarians with five years or less professional experience. Prospective applicants were given guidelines and asked to submit a summary of the planned paper. A review committee of three librarians from across the SELA region judged summaries on the basis of subject, content, scholarship and current interest, and selected these two papers. The Southeastern Librarian is pleased to reprint the papers in their entirety.

Digital Description and Access: The Hugo L. Black Collection at the University of Alabama School of Law Library

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The Hugo L. Black Collection consists of an extensive book collection, various exhibits, personal correspondence, tapes and transcripts of interviews, descriptions of court decisions, office materials, biographical and bibliographical information, photographs, student papers, lecture notes, and personal memorabilia. Hugo LaFayette Black served two terms as a United States Senator, was an Associate Justice of the United States Supreme Court from 1937 until 1971[1], and "the most distinguished graduate of the University of Alabama School of Law."[2] Black died in 1971 soon after stepping down from the Court.

Part of the Black collection is located in a replica of Justice Black's Alexandria, Virginia study containing its original furnishings. I began processing the collection over two years ago and am nearing completion of the print materials. The concepts that have guided the processing of this collection are various

manifestations of preservation, access, and retrieval issues for information in digital environments. Specifically, I have considered the relationships between bibliographic records and web pages; traditional archival finding aids and Encoded Archival Description (EAD); and my descriptive bibliography experience and doctoral studies in information theory, with an emphasis on digital formats. Major concerns throughout processing the Black Collection have centered upon the identification and construction of access points in a digital environment based on accuracy and the appropriate level of descriptive annotations for the books themselves, and the various letters and newspaper articles discovered in the books. While the furnishings from Black's home study in Alexandria, Virginia, were shipped here in 1973, most of his favorite books did not arrive until 1983 when the Supreme Court Library stopped maintaining "bibliographic memorials for individual justices" because it ran out of space.[3] As a result we have obtained more material than Black originally kept on his study shelves. We stored some materials waiting for processing, such as most of the legal reference books, so that "the maximum numbers of monographs and works of special interest" could be placed on the study shelves [4]. Approximately 72 cubic feet of boxes were stored in a closet.

Black's library consisted of primary and secondary legal materials, a large collection of historical writings, and other genres ranging from poetry to tennis. The distinguishing features of the collection are the broad subject material, the variation of format —cheap paperback copies are mixed in with some valuable rare books—and the fact that he read

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[1] *Memorial Addresses and Other Tributes in the Congress of the United States on the Law and Contributions of Hugo Lafeyette Black.* Washington: U.S. Government Printing Office, 1972: vii-viii.

[2] Pruitt, Paul M., Jr. "The Return of Hugo Black: The Significance of the Hugo L. Black Collection at the University of Alabama." *Alabama Law Review* 43:1(1991): 291.

[3] *Ibid*, 295, 303.

[4] *Ibid*, 304.

and used the materials regularly. Black valued content over container and regularly perused used book catalogs. The classics greatly influenced his thought. "Black viewed human nature as changeless." [5] Biographer Howard Ball comments that Black's books by and about Greek philosophers, poets, and historians "are worn from repeated use, underlined and replete with marginalia, [and] indicative of the personal conversations Black had with the authors of these books." [6] He was so fond of the works of Edith Hamilton that he "literally coerced his children into reading them, with further admonitions to read Livy or Plutarch when the boys were in college or in the military." Black also gave these books to his grandchildren, had both his wives and all his law clerks read Pericles and Aristotle, among other Greek authors. While Aristotle was Black's "favorite author," Edith Hamilton's *The Greek Way* was Black's favorite book and the first required reading that he assigned to all his new law clerks.[7] Roger K. Newman's biography of Black contains an entire chapter, entitled "Books Are My Friends," devoted to Black's reading habits in which he discusses Black's literary friendships with Will Durant, Carl Sandburg, and Alfred Knopf, among others. Knopf published a book of Black's opinions and "usually took Black to dinner" several times each year.[8] In addition to the classics, Black was also deeply interested in United States history. Black admired American historian Charles Beard and wrote a foreword to one of his books. Black also extensively studied the writings of Thomas Jefferson. [9]

As I began this project, I consulted Daniel Meador's publication *Mr. Justice Black and His Books*, an annotated catalog of Black's personal collection as well as an invaluable commentary of Black's books and reading habits. [10] I read the narrative chapters several times while considering how to formulate a methodology for processing this collection. I wrote Meador, describing my plans and solicited any comments or suggestions. In his gracious and encouraging response he remarked that he was glad the

collection would be made more accessible to scholars and others, and offered assistance if needed. Throughout this process, I have consulted Paul Pruitt, Special Collections Librarian, and David I. Durham, Law School Archivist, both of whom shared their knowledge, experience, and insights regarding different aspects of this project. Dr. Pruitt has been involved with this collection at every aspect of its existence. His knowledge and perspective provide continuity regarding the conception, acquisition and development processes of the Black Collection. In his 1991 article, "The Return of Hugo Black: The Significance of the Hugo L. Black Collection at the University of Alabama", he "takes up where Professor Meador left off, describing the fate of the Black collection and the uses to which it has been put since the death of its creator . . . . how Black's books were acquired by officials of the University of Alabama School of Law, and how they decided to construct a replica of the library/study as it appeared in Black's Alexandria, Virginia home." [11] Marcella Genz, Assistant Professor at Florida State University, helped me with both cataloging expertise and experience working with various historical materials. David Lowe, Computer Services Librarian, and Sondra Hayward, Library Assistant, provided technical support as I established electronic representation and access points for these materials in our online catalog, while considering what future technological issues might emerge. Although my primary focus has been on Black's books, I continually cultivated my awareness of how representation and implementation procedures could be applicable to non-print items in both the Black and our other individual special collections. When I encountered problematic details that involved cataloging choices, I consulted the *Anglo-American Cataloging Rules* ,[12] the *Archives, Personal Papers, and Manuscripts Cataloging Manual for Archival Repositories, Historical Societies, and Manuscript Libraries,*[13] and Professor Genz.

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[5] *Ibid*, 292.

[6] Ball, Howard. *Hugo L. Black: Cold Steel Warrior.* New York: Oxford University Press, 1996: 7.

[7] Newman, Roger K. *Hugo Black: A Biography.* New York: Pantheon: 446.

[8] *Ibid.* 452

[9] *Ibid*, 453, 448-449.

[10] Daniel J. Meador. *Mr. Justice Black and His Books.* Charlottesville: University Press of Virginia, 1974.

[11] See Pruitt, "The Return of Hugo Black," 292.

[12] *Anglo-American Cataloging Rules* prepared under the direction of the Joint Steering Committee for Revision of

AACR, a committee of the American Library Association, the Australian Committee on Cataloging,. The British Library, the Canadian Committee on Cataloguing, the Library Association, the Library of Congress. 2nd ed. 1998 Revision

[13] *Archives, Personal Papers, and Manuscripts: A Cataloging Manual for Archival Repositories, Historical Societies, and*

The synthesis of information made possible by electronic representation and the library space in which the collection is housed have helped determine the way I approached and designed access for the Black Collection. We have Black's books in different locations because we acquired more books than were originally contained in the study. Materials currently housed in the replicated study include books from both the Alexandria house and the Supreme Court Chambers. Currently we have in a secure closet approximately 72 cubic feet of boxes containing books that may have originated from the study and other two rooms of the house in which Black kept books[14], along with two 35 x 16 x 18 wooden crates containing books, personal items, artifacts and memorabilia, and some incidental personal manuscripts. A few items, such as the autographed copy of Martin Luther King's *Stride Toward Freedom*, are kept in a locked room for added security. All these books belonged to Black with the exception of those containing his wife's name.

Upon my arrival, the books had been arranged in the replicated study more or less alphabetically by author. I intended to work my way systematically around the room, but soon I decided to pull all the relevant books I could find for a display, "Hugo L. Black and the Classics." This exhibit includes 103 books, one of which is Edith Hamilton's *The Greek Way* opened to a page with Black's marginal notes and Black's top hat. Because some of the texts I gathered for this display were not listed in the Meador bibliography, I began to notice what became an ongoing discrepancy between the books contained in the study but not entered in either the Meador bibliography or the card catalog drawers. I countered these open spaces by carefully recording bibliographic information for the newly documented books to build upon the solid framework of arrangement already in place.

I assigned Library of Congress call numbers, some of which duplicate items already held in other locations of our library. When another copy of a book exists elsewhere in our collection, I indicate its placement in the Black Collection through a location code assigned at the same time that I enter the barcode into the

system. I also place descriptive information in a note field of the item record. If a Black Collection book is a singular item in the library and will most likely remain so in our total collection, I include descriptive information in the bibliographic record as the most direct method of representation. Occasionally, I reassigned what became the main entry in the electronic bibliographic record but retained all access points. Access points are author, title, subject headings, and an added title entry, "Hugo Black Collection." The added title entry is based on the policy the Special Collections Librarian and I established for the creation of electronic bibliographic records for all our individual special collections. The Archivist and I built upon this when we later linked bibliographic records in Atticus, our online catalog, to individual webpages through the 856 MARC field.

Early on, I realized that this collection was potentially more than just a group of books that had belonged to a significant political and historical figure, and that a digital information environment would be well suited for description and meaningful access to this collection. At this point, I was not sure what exactly was possible but knew that I needed to do more than simply catalog each book so I made notations in the Meador book of inscriptions, annotated pages and other interesting details that could be scanned and made available on our webpage. I decided to differ from Meador in several ways. In processing each book, I used what became my working copy of Daniel Meador's annotated bibliography, supplemented with various notes that I arranged in file folders. I penciled in entries for books that were not listed in Meador's work. Sometimes I located these in the Black Collection card catalog drawers, sometimes not. I made notations for approximately the first hundred books I processed while considering what to put into the bibliographic record, and consulted David I. Durham, Paul Pruitt, and Marcella Genz, concerning ways of describing how Black had interacted with these texts. After working with this preliminary group, I selected what seemed to me to be the most logical notations I could use to describe what I had seen in these books. Instead of using the qualitative indicators, "marked" and "extensively marked," I chose "marginalia" to describe any type of notations or markings outside the text and "underlinings" to indicate that Black had underlined certain passages of text, placing these into a general note field in the MARC record. I did not comment as to the extent of

Manuscript Libraries complied by Steven L. Hensen. 2nd ed. The Society of American Archivists, 1989.
[14] See Meador, *Mr. Justice Black and His Books*, 40.

Black's marginal notes or underlinings because it was difficult to determine an objective delineation: some books were clearly very extensively marked but I decided not to make this a qualitative decision, partly because Meador's book already indicates this in most cases. If I process books heavily marked that are not in Meador, I record corresponding notes on that entry.

For the electronic record of several books, I did not indicate "marginalia" because I do not believe that Black made these markings. My decisions were based on the sense I began to develop of what is characteristic of Black's note-taking methodology as well as recognizing his handwriting. I made notations in my working copy of Meador's book stating my judgment and why I had interpreted these markings as not belonging to Hugo. I continued to use Meador's "personally indexed" to indicate that Black had written notes, usually in the very back of the book but sometimes in the front, consisting of brief keywords or occasional phrases in quotation marks accompanied by page number. I decided to add the phrase "Book is stored in clamshell box" for books that had already been treated as fragile as well as to help with later identification for someone seeking the book. I included notations that I added to the bibliographic records describing items found in books such as newspaper articles, party invitations, and thank you notes although I did not always include this information in the bibliographic record. Other information not included in bibliographic records includes my personal observations, such as noting that an item is the only book in which Black made notations in red instead of in graphite pencil.

When I encountered a book that was not listed in Meador's bibliography, I checked the card catalog drawers that had arrived with the collection, listing books from Black's study and Supreme Court chambers. If I did not find an entry, I would pencil the bibliographic information into my Meador catalog. Every effort will be made to maintain authenticity of the study. Because there will be no library-generated markings on any of the books, I have taken extensive descriptive notes about the physical condition and characteristics of these books and have also made photocopies of certain pages, prompted either by bibliographical or historical interest. I have consulted the Special Collections Librarian and Archivist countless times, often on an item-by-item basis,

regarding decisions of this nature. I have placed acid-free strips into each book that contain the call number, main entry information, and the identifying barcode that corresponds to the bibliographic record in our catalog. We plan to trim the strips so that they fit inside the book but are not visible, thus restoring the original appearance of the study. I will place the acid-free strip at the verso for consistency of location and so as to prevent over-handling of fragile materials. Some of the books are in poor condition and arrived in clamshell boxes. They will remain so and we have repaired some of these boxes.[15] The oversized books are stored, in LC order, on the larger bottom shelves along the wall to the side of Black's desk to not detract from the overall view of the room, with a note in the item record indicating that this is an oversized book. This is our policy for other Special Collections materials, along with a note to "Please consult archivist." Some fragile items, such as pamphlets, are stored in acid-free envelopes. If their inclusion with the rest of the book collection proves to be aesthetically disrupting, I will recommend storing them again arranged by LC call number and with a corresponding electronic note for location purposes, directly behind the upper door that opens onto the Black Room from a hallway.

In addition to Black's annotations and some wonderful inscriptions from many different people (Black received many of his books as gifts), I discovered numerous interesting items inside his books. I always made at least two photocopies of all materials found, with the exception of pieces of paper being used as bookmarks, which I left in place. I recorded bibliographic information on the photocopies so that the book could be easily located if need arose to see the original.

The next stage after completion of the Black Collection print materials will be to work on its non-print items, especially the photographs. I needed to acquire more knowledge for processing non-print materials in digital environments to apply to the Hugo Black Collection as well as to other Special Collections materials. I attended the University of Virginia Rare Book School course, "Visual Materials Cataloging" with Helena Zinkham, who is Head of the Technical Services Section of the Prints

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[15] Paul Pruitt and Jacqueline Kennedy Jones, University of Alabama School of Law Library Clerk, both repaired and taught me how to repair these boxes.

and Photographs Division of the Library of Congress. For example, because Black's autographed Martin Luther King, Jr. book, *Stride Toward Freedom*, is stored in a secure location, we have photocopies available of the long inscription to give to interested patrons, who range from local schoolchildren to visiting legal scholars. [16] For those who do not visit and may not even know of the autograph's existence, a scanned image will eventually be available on our website. Other possibilities include electronic augmentation and enhancement to strengthen the collection by scanning examples of Black's annotations and providing links to other institutions. For example, The Library of Congress Hugo Black Papers consists of 216 shelf feet of 130,000 items.[17] These items relate to "his private life, his public career, his

colleagues and associates, and the Supreme Court since 1937."

The aspects of the Black Collection of which I have become most aware have been the essence of atmosphere that is preserved in the replicated study and the possibilities of electronic access that can transcend space and time by expressing portions of what it is that constructs the special nature of such a collection. The longer I handled these books as tangible physical objects, the more I realized the power of descriptive representation and access and that The Hugo Black Room is a very close approximation of the original study in the Alexandria house. Although the dimensions are not exactly precise,[18] the essence of the atmosphere remains. One of Black's former law clerks, David Vann, upon seeing the replicated room at the University of Alabama, said that "it was 'kind of a shock really,' for him to see again." [19]

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[16] The inscription reads: "To: Justice Hugo Black, In appreciation for your genuine good-will, your perceptive vision, your broad humanitarian concern, and your unswerving devotion to the noble principles of our democracy. With warm regards, Martin L. King Jr."

[17] Wigdor, Alexandra K. *The Personal Papers of Supreme Court Justices: A Descriptive Guide*. New York: Garland Publishing, Inc., 1986: 46-48.

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[18] See Pruitt, "The Return of Hugo Black," 299. "[W]hile the original study was seventeen by twenty feet, the planned space of fifteen by twenty feet would easily accommodate the furniture".

[19] See Pruitt, "The Return of Hugo Black," 301.

Additional References

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Distance Learners: Not Necessarily Distant

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At colleges and universities across the country, distance learning courses are becoming more prevalent. It has been estimated that in the year 2002 over 2 million students enrolled in distance learning classes and programs at the college level, up from 710,000 in 1998. The International Data Corporation, in the same report, projected that approximately 85% of all two- and four-year colleges would be offering distance learning courses this year, up over 20% in just four years[1]. Due to this trend in higher education, library services for distance learners has become a topic of discussion, inspiring the ACRL Distance Learning Section to establish the Guidelines for Distance Learning Library Services. This document outlines the steps necessary to insure that library services available to the distance learning community are equivalent to those provided to the traditional on-campus community[2]. Unfortunately, many college and university libraries found themselves in the position of playing "catch-up" once their institutions began offering distance learning courses, often without consulting the library about its preparedness to provide services such as home-delivery of books and articles, or toll-free telephone reference.

The ACRL Library Data Tables for 2000 show that of 1135 institutions (those surveyed that grant bachelors, masters, professional, and doctoral degrees), 72% are offering some measure of distance learning. Of these, approximately 90% are providing library services for the students enrolled in distance learning classes, although 92% of them report that they receive no additional funding for this purpose[3].

In addition to supporting students enrolled in online or distance courses, libraries must account for other remote users. Although students aged 25 and younger are still the majority, enrollment numbers for older students continue to grow[4]. Students beyond the traditional age are more likely to have jobs and families, and perhaps less likely to spend time on campus at the library, especially during traditional business hours. Students are increasingly foregoing the physical library in favor of doing their research online. Even with those living in the dorms or close to campus, those who were once traditional library users have become modern remote users.

The purpose of this paper is to examine many of the issues involved in providing library services to distance learners, and to discuss the growing overlap of services for traditional on-campus students and distance learners. Is the distinction between the two groups enough to merit a separation of services, or should libraries simply strive to meet the needs of all patrons, regardless of status or qualification? At some schools with a wide variety of course-delivery methods and a large student population, it might be considered a waste of time to differentiate between the distance learner and traditional student, or it might be increasingly difficult to identify the many categories of students. For this reason, it is proposed that libraries begin to consider blending distance library services with traditional services.

Defining the Distance Learner

[1]International Data Corporation, "Online Distance Learning in Higher Education, 1998-2002." Cited in Council for Higher Education Accreditation. "Distance Learning in Higher Education." CHEA Update 2 (June 1999). Available from http://www.chea.org/Research/distance-learning/distance-learning-2.cfm (accessed March 24, 2003).

[2] Association of College & Research Libraries, Distance Learning Section Guidelines Committee. 2000. "Guidelines for Distance Learning Library Services." Association of College & Research Libraries Web Page. Available from http://www.ala.org/acrl/guides/distlrng.html (accessed March 24, 2003).

[3]Association of College & Research Libraries. 2000. "Summary Data: Trends in Distance Learning Library Service." ACRL Library Data Tables 2000. Available from http://www.virginia.edu/surveys/ACRL/2000/trends.html (accessed March 24, 2003).

[4]National Center for Education Statistics. 2001. "Postsecondary Education." Digest of Education Statistics, 2001. Available from http://nces.ed.gov/pubs2002/digest2001/ch3.asp#1 (accessed March 24, 2003).

When establishing or evaluating services for distance learners, the library's first task may be to define the "distance learner" and establish eligibility criteria for special services. At many schools there is no official definition of a distance learner. Perhaps it is someone who is enrolled in a course that is coded as a distance learning course, or a student who takes no on-campus courses. It may be a student, regardless of how close he/she lives to the university, who takes only courses designated as distance learning courses (this designation is probably tied to method of course-delivery). It could be a student who lives further than a specified distance from campus and therefore must commute to school. If a student living on campus takes only online courses, could this student potentially be categorized as a distance learner? Students themselves may not self-identify as distance learners, even if they are eligible for special services. Each library must have some sort of criteria for determining a student's status as a distance learner, or decide on a case-by-case basis. This could be an impetus for libraries to work more closely with college or university administration to more readily identify distance learning courses or students, so that both the library and the university as a whole might provide student services more effectively. The University of Arkansas Libraries require that distance learning students register with the library each semester by completing an online form[5]. Other schools simply list eligibility requirements, like the Ingram Library at the State University of West Georgia[6].

Remote Access

College and university administrations must address the issue of how distance learners can easily obtain a student ID. Some of Florida's universities have established procedures for issuing traditional University photo-ID cards to students through the mail. This usually requires the patron to mail a passport sized photo and payment to the ID card office, which then issues the ID using the provided photo and mails the card to the student. Florida Gulf Coast University outlines the procedures for obtaining an official University ID card on their web page[7].

Official college or university-issued ID cards may be mandatory at some schools, since the ID number is linked with campus computing systems and is required for accessing e-mail or web-based courses. Schools in this situation would need to develop a systematic and efficient means of issuing ID cards if they have large populations of distance learning students. Mandatory on-campus orientations for all distance learning students is one way to address this issue, providing an opportunity to have an ID made.

Some schools do not require that students obtain an official University identification, but rather issue a library number directly from the circulation department. For students who don't need a University ID, this is sometimes an easier and cheaper alternative. Often they can request an ID number via email or web form, upon which the number is issued, activated, and emailed to the student within a few days. At the University of Tennessee Libraries, students must contact the Distance Education Librarian to get a non-photo ID card[8]. Since a valid student ID number is often required for remote access to databases, some libraries must devise a way for students to validate or activate their numbers. The University of Florida has created a "Library Number Activation Request" form[9].

Whether students are in another state or across town, many access the library from home or work. Remote authentication to databases and other restricted online library resources has been a very challenging technological issue for librarians in the 21st century. Many libraries restrict access to online databases using IP authentication via some sort of proxy, either a traditional proxy, or Useful Utilities' EZproxy or similar software. Others are using barcode or password access. Students at some schools must contact a librarian each semester to obtain the database passwords. At UNC Charlotte's Atkins Library, students log into a course reserve system to obtain the database passwords[10]. To confuse the issue more, many libraries are using several different methods of authentication, depending on the databases in question (especially schools with access to state-wide collections of databases such as

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[5] http://libinfo.uark.edu/distance_ed/about.asp#eligibility

[6] http://www.westga.edu/~library/depts/offcampus/policies.shtml

[7] http://library.fgcu.edu/Circulation/circpol.htm

[8] http://www.lib.utk.edu/offcamp/services.html

[9] http://www.uflib.ufl.edu/distreg.html

[10] http://libweb.uncc.edu/library/proxpass.htm

Georgia's GALILEO, North Carolina's NC LIVE, The Kentucky Virtual Library, Mississippi's MAGNOLIA, South Carolina's DISCUS, and Virginia's VIVA).

Reference services

Extended hours of reference services are important for both distance learning and non-traditional students. Students with full-time jobs and outside commitments are probably more likely to do their library research at home, before or after normal business hours. After-hours help from a librarian is crucial, especially if these students receive no formal in-person library instruction.

Unlike email, telephone and chat reference services satisfy the distance learner's immediate need for help. Off-campus or non-traditional students should be able to speak to a librarian when necessary and receive feedback or an answer almost immediately, as if they were at the reference desk in the building. When providing telephone reference, many libraries place the needs of the patrons on the telephone second to those of in-person patrons. The traditional thinking behind this policy is probably that the patron who took the time to travel to the library and ask a question in person deserves more prompt service. Perhaps this should not apply to the patron who is paying 10 cents per minute to call the desk, or the person who could not possibly travel to the library due to disability or sheer physical distance. Distance learners need to reach a librarian who has the time to devote to teaching them to use the library's resources effectively from a remote location.

Libraries that have removed telephone service from the traditional reference desk have eliminated the "competition" between in-person and telephone patrons. The resulting issue is then finding the resources to staff a separate service point. In some cases, when telephone reference services are staffed apart from reference desk services, the hours of phone reference differ from those of the library or reference desk. Often the service hours for telephone reference are not listed, and patrons may not know whether after-hours help is available.

Toll-free telephone reference is also crucial for students living at a distance from their home institution. Whether they take courses online or via some other delivery method, or they drive long distances to attend on-campus classes, or they are on vacation and working on a research assignment, students should be able to reach the library in a timely manner at no cost. Some libraries list a toll-free number on their web page, often on the page of library services aimed at distance learners. Others list a college or university toll-free number that will transfer distance learners to the library. Some list the toll-free number of their distance education department on campus. Some libraries do not list the actual toll-free number on their web page, but do advise students how they can find it. On the University of Alabama's web page, they inform students of a toll-free phone number for reaching a librarian, but the phone number is not included. Students must request the number from their professor or the College of Continuing Studies[11].

Document delivery/Interlibrary Loan

Many libraries are exploring electronic delivery of interlibrary loan materials, especially those using Ariel and ILLiad or Clio Web ILL management software. The accelerated delivery time, along with the ability to submit and track interlibrary loan requests online is a benefit to all students, distance learners and traditional on-campus students alike.

The need for separate distance learning services arises when considering interlibrary loan and document delivery. Since delivery of materials costs the library money, caution should be exercised when determining patron eligibility. Home delivery of books and articles that the library owns would certainly be a popular service among all students and faculty if it were free. Patrons willing to pay for these services are often served by a fee-based document delivery department, but most agree that distance students should not be expected to pay extra for access to library materials. In this case a line must be drawn to differentiate off-campus patrons and true distance learners.

Florida State University establishes eligibility for document delivery based on the student's distance from campus, stating on their Library Resources for Distance Learners web page "If you live beyond fifty miles of a State University System Library, the Florida State University Libraries will be your primary research facility. The following services are available to

[11]

http://www.lib.ua.edu/services/distanceed/dlrequest.shtml

students who live more than fifty miles from any of the FSU campuses."[12] The University of Central Florida Interlibrary Loan department states the following about patron eligibility: "Any currently enrolled UCF student who is <u>NOT</u> enrolled for ANY classes taught on the Orlando campus or at a branch campus to which we send materials.   Please note that students taking even one class taught on the UCF campus are not eligible for this service."[13]

Perhaps, as is the case at these sample schools, a good policy is to establish eligibility criteria for document delivery, but standardize other services for all students, regardless of distance learner or off-campus status.

Instruction/Information Literacy

Some librarians suspect that faculty who teach distance learning courses tend to "dumb-down" the research component of their courses or eliminate it altogether due to low expectations of the library and its services for distance students. There is also the issue of timely delivery of materials, which could influence instructors who may not be able to allow enough time for students to complete a true research project. Barriers to remote access, such as the incompatibility of some proxy servers with some Internet service providers, may also discourage instructors from assigning projects that require library access.

Instruction librarians are now faced with the challenge of ensuring that all students gain some level of information competency, regardless of whether they visit the library on campus. Besides true distance learners who may never come to campus, many courses now have an online component with reduced seat-time in the classroom. Librarians now must encourage the professors teaching these courses to find the class-time to schedule library instruction, and must be available to teach them if the classes meet in the evenings or on weekends. The proliferation of branch campuses, joint-use facilities, and other sites where classes are taught also stretch the library's resources, requiring that a librarian travel if face-to-face library instruction is requested.

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[12]
http://www.fsu.edu/library/explore/instruct/distlrn.s html#facilities
[13] http://library.ucf.edu/ill/distance.htm

Marketing Services

Perhaps the most challenging aspect of providing library services to distance learners is marketing. How do libraries let students know that these specialized services are available to them because of their status as distance learners? Some students don't consider themselves distance learners, perhaps because they attend classes on campus or because they live in the same city as their school. Again, the issue of what defines a distance learner is important, in providing services and in marketing to them. Unless the college or university as a whole identifies distance learners, either as a student status, or as a function of the classes they are taking, librarians have no way of reaching these students. Even if certain classes are identified as distance learning courses, librarians would have to obtain a list of the students enrolled in that class in order to reach them. One method of accomplishing this is establishing a healthy relationship between the library and the campus distance-learning department, if one exists. Some distance learning departments will include library materials in mass-mailings to distance students at the beginning of each semester.

One sure way to reach the distance students is via the distance faculty. If instructors require papers or projects with a research component, there is an excellent opportunity to provide the class with information about library services and accessing library resources remotely. Many librarians forge relationships with faculty and encourage those teaching online classes to link to specific library web pages. Other librarians create library web pages specifically for an individual class, which acts as subject-specific online library instruction.

Conclusions

There are countless ways to provide specialized library services to a specific population, but the nature of the distance learning phenomenon presents a unique set of challenges. There are enough variables, from student demographics to library policies, to make this a confusing topic. To paraphrase, distance learners aren't always very distant, and traditional on-campus learners aren't always as traditional as we think. To simplify library services, attempts should be made to accommodate all library patrons, offering free, timely (and after-hours if necessary), adequate, quality library services.

Book Review

Graham, Patterson Toby. <u>A Right to Read; Segregation and Civil Rights in Alabama's Public Libraries, 1900-1965</u>. Tuscaloosa: University of Alabama Press, 2002. 200 pp.

In the mid-1930's a system of segregated libraries with small, understaffed and poorly funded branches for African-Americans existed in a few of Alabama's cities and in rural Walker County. By 1963 libraries in Mobile, Montgomery, Huntsville, Birmingham, Selma, and Anniston (and presumably other Alabama cities and towns) had been desegregated, some peacefully and some not so peacefully. The Alabama Library Association began accepting African-Americans as members two years later, in 1965.

Dr. Graham's extremely interesting and well-written work is a detailed account of the varying levels of library access afforded Alabama's African-American citizens from 1900 to 1965. It is based on painstakingly sound research in books, journals, newspapers, correspondence, library board minutes and records, and interviews with librarians and others who related their own experiences. The book contains an introduction and conclusion, five chapters of text, twenty-one pages of notes, and a bibliographic essay.

Chapter One, "Black Libraries and White Attitudes, The Early Years," discusses the period from 1918-1931 and the segregated (for blacks only) libraries in Birmingham and Mobile, the first Alabama cities to have any sort of library service for African Americans. Chapter Two, "Black Libraries and White Attitudes II, The Depression Years," tells about the Julius Rosenwald project, which funded a network of libraries for African Americans in Walker County and the respective roles of the Works Projects Administration and the Tennessee Valley Authority in providing them somewhat limited library service. Chapter Three, "African-American Communities and the Black Public Library Movement, 1941-1954," focuses on efforts to secure libraries for their communities by Huntsville, Montgomery and Birmingham's African-American civic organizations, educators, clergy, business leaders and librarians.

Chapter Four, "The Read-In Movement, Desegregating Alabama's Public Libraries, 1960-1963," relates the sit-ins, read-ins, and other events that occurred during the integration of libraries in Mobile, Montgomery, Huntsville, Birmingham, and Anniston. Chapter Five, "Librarians and the Civil Rights Movement, 1955-1965," tells of the bravery of three librarians: Juliette Morgan (Montgomery Public), Emily Reed (director of the state library agency), and Patricia Blalock (director of Selma Public) and of the actions and non-actions of the American and Alabama Library Associations. Dr. Graham's annotated bibliography should prove tremendous assistance to other scholars of both public library history and of the civil rights movement in Alabama. Especially helpful are the sections on Atlanta University Theses and on using unpublished sources.

Dr. Graham holds a masters in History and both a masters and doctorate in Library Science from the University of Alabama. His knowledge of the civil rights movement and his insights into the conflict of values experienced by Alabama librarians are evident throughout his work. Southeastern librarians, many of whom will remember and relate with the description of events during the sixties, will find this book a fascinating read. For some it may shed light on events that occurred in their own states and libraries. It is this reviewer's hope that Dr. Graham's work will also lead to further reading and research on libraries and race relations, an important and highly relevant topic for today's librarians.

Dr. Annabel K. Stephens
Associate Professor,
School of Library and Information Science
University of Alabama, Tuscaloosa

Book Review

Seabrook, Charles. <u>Cumberland Island: Strong Women, Wild Horses.</u> Winston-Salem, N.C.: John F. Blair, 2002. 373pp.

Charles Seabrook, the award winning environmental reporter for the *Atlanta Journal-Constitution,* has written an absorbing book about one of the most beautiful spots in eastern North America. Cumberland Island, located off the coast of Georgia near the Florida border, is a third larger than Manhattan and home to towering trees, sandy beaches, exotic plant life, salt marshes, wild horses and wild hogs. The establishment of Cumberland Island National Seashore was intended to preserve this unique ecosystem, but ever since its inception the park has been burdened with major disputes over tourism and environmental management. For example, should the herds of non-indigenous horses and hogs be protected because they are a beloved part of Cumberland's mystique, or should they be thinned or removed completely, in light of the destruction they inflict on the island's natural environment? Ironically, some of use rights that the National Park Service had to grant in order to obtain the property for the park are now contributing to environmental concerns, e.g., riding motorized vehicles on the beach.

As the book's title implies, several remarkable women have dominated the history of Cumberland Island. Seabrook's vivid portrayals begin with Catharine "Caty" Greene Miller, the widow of Revolutionary War hero General Nathanael Greene and close friend of Eli Whitney. Caty established the first great residence on Cumberland, a profitable cotton plantation. A strong woman in a different manner was Zabette, a mulatto slave who bore several children by the island's largest pre-Civil War landowner and slave owner. In the reconstruction era, the sister-in-law of Andrew Carnegie, Lucy Coleman Carnegie, began developing a series of magnificent residences for her closest family members. Meanwhile, a small but thriving black community grew on the northern part of the island, led in the mid-twentieth century by its unofficial mayor Beulah Alberty, a strong-willed eccentric whose moonshine liquor and raccoon trapping were only two of many moneymaking schemes to pay for her niece's education. Later, Lucy Ferguson, granddaughter of Lucy Coleman Carnegie, ensured that a national park would be established on Cumberland only on her terms.

Today, the island's most influential women are on opposite sides in the disputes over Cumberland's future. Gogo Ferguson is the great-great-granddaughter of Lucy Carnegie who helped organize the 1996 Cumberland Island wedding of John F. Kennedy Jr. and Carolyn Bessette. Carol Ruckdeschel, a naturalist and outspoken environmentalist, has lived and researched on Cumberland since the 1970s. In one of Cumberland's most dramatic incidents, she killed a former lover who was breaking into her cabin.

Seabrook writes in a clear and straightforward style that belies his journalistic background. Rather than sensationalizing a story that already boasts sex, violence, power, and a cast of colorful characters, the author recounts dispassionately the litany of lawsuits, backroom deals, internecine family conflicts, government lobbying, and naked power grabs. He also evokes Cumberland's many attractions effectively, and does a good job of tracing the current feuds back to their historic sources. This work is authoritative and well documented, thanks to his many hours of archival research and personal interviews. If you have never visited Cumberland Island, I suspect you will be very eager to do so by the time you finish this book.

W. Bede Mitchell
Dean and University Librarian
Georgia Southern University

Call for Nominations
Outstanding Southeastern Library Program Award

Purpose: To recognize an outstanding program of service in an academic, public, school, or special library in a Southeastern Library Association member state.

Criteria:
1. Any academic, public, school, or special library in the member states of the SELA may be cited for an outstanding program of service. Programs of service may include, but are not limited to library activities, projects, or programs.

2. The program of service must take place during the biennium in which the nomination is made.

3. The minimum time span for a nominated library program must not be less than three months, including the development and evaluation stages of the program.

4. The person making the nomination must be a member of SELA.

5. Nomination applications for the award should include the following information:

- SELA member's name
- Library's name, address, telephone number
- Beginning and ending dates of the program
- Narrative statement describing the program
  - its goals and steps to achieve the goals;
  - special contribution of the program/project
- Supporting documents related to program publicity

Nomination deadline is **April 15, 2004.**

Please contact Nanette Kicker, Chair, to submit a nomination or request additional information. Nominations can be mailed, emailed or faxed to:

Nanette Kicker
Sequoyah Regional Library System
116 Brown Industrial Parkway
Canton, GA 30114
Email: kickern@mail.cherokee.public.lib.ga.us
Phone: 770-479-3090, Ext. 21
Fax: 770-479-3069

Call for Nominations for Rothrock Award

Purpose: To honor a librarian who has contributed substantially to the furtherance of librarianship in the southeast during a career.

History: The Rothrock Award was established in 1976 from the will of Mary Rothrock. It was sent to the SELA President on February 11, 1976, and stated, "I bequeath $10,000 to the SELA, the income from which shall be used to establish a biennial award. The recipient of this award is to be designated by a committee of the Association from among librarians of the Southeastern States, and chosen for exceptional contribution to library development in the Southeast." The committee shall be appointed by the President of SELA and shall include librarians from varying member states of SELA. The recipient of this award has always been kept secret until the actual presentation is made during the conference.

Criteria:
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2. Service in one or more states of the southeast would qualify a person for nomination for the award.
3. The award should be made to only one person in any biennium, and, if no deserving person is nominated, an award may be omitted for that biennium.
4. An SELA member must make the nomination.

Please provide name of nominee, nominee's phone/email, mailing address, SELA member making nomination, member phone/email, signature, date and supporting biographical information.

Submit nominations along with any supporting biographical material, to any member of the Rothrock Award committee by **April 15, 2004**

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P. O. Box 1448
Oxford, GA 30054
libkmn@emory.edu

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2. News releases, newsletters, clippings, and journals from libraries, state associations, and groups throughout the region may be used as sources of information.

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