Shelby L. Merritt. Describing Historical Objects for Users with Subject Knowledge: Lessons from the Charles Kuralt Learning Center. A Master's Paper for the M.S. in L.S degree. April, 2015. 45 pages. Advisor: Denise Anthony

The research on on improving the accessibility of descriptive records for cultural objects is extensive. Such studies, ranging from indexing and subject access to experiments with social tagging, have historically focused primarily on art objects to the neglect of other cultural objects, however. Utilizing the Charles Kuralt Learning Center, a collection of historical objects at the University of North Carolina-Chapel Hill, this study explores the needs of a specific user group—researchers with relevant subject knowledge—when using descriptive object records for research. Three major themes emerged during the data analysis process: the contextualization of objects; the relationships between object records; and an interest in confirmation, validation, and authenticity.

Headings:

      Collection management (Museums)

      Cultural property

      Information needs

      Descriptive cataloging

DESCRIBING HISTORICAL OBJECTS FOR USERS WITH SUBJECT
KNOWLEDGE: LESSONS FROM THE CHARLES KURALT LEARNING CENTER

by
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I. Introduction

There is extensive research on improving the accessibility of descriptive records for cultural objects. However, such studies, ranging from indexing and subject access to experiments with social tagging, frequently focus on art objects to the neglect of other cultural objects. Historical collections are useful primary documents for researchers and students, but their associated records are frequently limited to basic documentation and written with a museum specialist, often curatorial, audience in mind. Utilizing the Charles Kuralt Learning Center, a collection of historical objects at the University of North Carolina-Chapel Hill, this study seeks to examine the interaction between the object, its surrogate record, and users. The purpose of this study is to explore methods for describing historical artifacts for a specific user group—researchers with domain knowledge—in a manner that is more useful to them than the traditional museum object record.

There is a significant amount of research on user-centered documentation methods for art and other visual objects, but there remains a need to study user-centered cataloging for collections of historical artifacts. The existing scholarly discussion of this topic focuses on the general audience of museums and rarely discusses the specific needs of smaller subsets of users. This study seeks to investigate the needs of specific users of object records, rather than the generalized "public" often addressed in museums. Specifically, this study seeks to discover what two different user groups, researchers with

preexisting subject knowledge and researchers without preexisting subject knowledge,

need from a surrogate of an historical object.

II. Literature Review

Literature related to the description of historical artifacts from the perspective of specific user needs is still emergent; existing studies of user-centered description of art objects may be the best benchmark for comparison. The description of art objects must take into consideration problems and needs particular to the strongly visual qualities of art; nevertheless, the description of art and historical objects share many common elements and art documentation research is relevant to this study.

Describing Cultural Objects

The documentation of objects is an essential practice in cultural heritage organizations. In *Museums and the Interpretation of Visual Culture*, Eilean Hooper-Greenhill's discussion of the word 'object' highlights three important definitions: "a material thing that can be seen or touched", an "aim or purpose", and "a thing to which actions, feelings or thoughts are directed."[1] These definitions are not as inseparable as they seem, Hooper-Greenhill argues, because things do not exist outside of our interpretation of their meaning. Museum professionals have long recognized that the meaning of objects is imposed upon them from a certain perspective; objects, therefore, can have multiple meanings.[2]

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[1] Hooper-Greenhill, Eilean. 2000. *Museums and the Interpretation of Visual Culture*. New York: Routledge. 104.
[2] Ibid. 111.

Museum collections' catalogs often do not reflect the capacity of objects to carry multiple meanings, however. Museum catalogs rarely provide sources for the knowledge they present; instead they choose to adopt an "authoritative, unsourced voice" which fails to incorporate multiple perspectives.[3] Part of the difficulty, Paul F. Marty writes in *Museum Informatics*, is that museum professionals find themselves stretched thin by their various responsibilities and must limit themselves to basic identifying description at the expense of more detailed analysis or interpretation.[4] Zoller and DeMarsh also identify the division of responsibilities between curator and registrar as a potential roadblock to robust objects records. The authors invoke a persistent notion that "intellectual access to a collection must come from a curator", who has specialized knowledge of the collection; registrars may be hesitant to "encroach on the curator's perceived territory" by adding subjects and intellectual content.[5] To make matters worse, the profession also lacks a clear definition of the essential purpose of the museum catalog: is it a resource for curatorial research, a "surrogate for objects for collection management purposes", or a public access point to the collections?[6]

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[3] Marty, Paul F. and Katherine Jones. 2008. *Museum Informatics : People, Information, and Technology in Museums*. New York: Routledge. 37.
[4] Marty, Paul F. and Katherine Jones. 2008. *Museum Informatics : People, Information, and Technology in Museums*. New York: Routledge. 37
[5] Zoller, Gabriela, and Katie DeMarsh. 2013. "For the Record: Museum Cataloging from a Library and Information Science Perspective." *Art Documentation: Journal of the Art Libraries Society of North America* 32 (1): 62-64.
[6] Shubert, Steven Blake. 1996. "Subject Access to Museum Objects: Applying the Principles of the Subject Approach to Information from Library and Information Science to the Documentation of Humanities Museum Collections." Ph.D., Canada: University of Toronto. 4.

Trends in Object Documentation

The desire to make information about objects accessible has been a goal for the caretakers of museum collections since the early twentieth century, but ideas about to *whom* that information should be made available have changed over time. Catalogs and indexes have long been the domain of curators (and later, registrars), primarily serving to identify objects and track their locations.[7] But as museums became more public at the turn of the twentieth century, object records began to "address the needs of users other than museum staff".[8] By at least the 1930s, museum professionals began to recognize additional functions of the catalog: providing an object's history and significance, and classifying an object.[9] By the 1990s, museum catalogs were supporting a variety of functions other than the basic description of the collection. *The New Museum Registration Methods* (1998), an essential manual for the museum registrar, highlights several functions of the museum that benefit from collections information, including conservation, publications, image management, accounting, administration, and the public.[10]

Since the 1990s, aided in part by digital technologies, museums have increasingly tried to make their catalogs publicly accessible, but increased accessibility necessitates rethinking the way objects are described. Museums must often "accommodate the

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[7] Urban, Richard. 2014. "Library Influence on Museum Information Work." *Library Trends*, January: 600.

[8] Zoller, Gabriela, and Katie DeMarsh. 2013. "For the Record: Museum Cataloging from a Library and Information Science Perspective." *Art Documentation: Journal of the Art Libraries Society of North America* 32 (1): 59.

[9] Urban, Richard. 2014. "Library Influence on Museum Information Work." *Library Trends*, January: 600.

[10] Buck, Rebecca A. and Jean Allman Gilmore. 1998. *The New Museum Registration Methods*. Washington, DC: American Association of Museums. 17.

growing audience of…users who are not experts" and who are therefore unfamiliar with description practices used by museum professionals.[11] An evaluation of a gallery information system from a 1998 study of information needs at the Science Museum in London sampled 158 random visitors—a general audience—to determine the types of object information to which they would like to have access.[12] The study found that visitors found certain types of object-based information critical to their understanding of the collections: the age of the object, its purpose, general factual information, and its construction. Visitors indicated little interest "in the physical dimensions of the objects on display, information about other objects in storage, or how they came to be in the Museum, and their former ownership."[13]

Coburn and Baca assert that increased access projects often suffer from two misconceptions: a "project" approach and understaffing.[14] The project approach conceptualizes increasing access as something definite and finite; the authors suggest that the resources in these types of projects tend to be directed toward flashy activities—such as creating high-quality digital images—while activities that support more robust uses of

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[11] Marty, Paul F. and Katherine Jones. 2008. *Museum Informatics : People, Information, and Technology in Museums*. New York: Routledge. 112.
[12] Booth, Ben. 1998. "Understanding the Information Needs of Visitors to Museums." *The International Journal of Museum Management and Curatorship* 17 (2): 142.
[13] Booth, Ben. 1998. "Understanding the Information Needs of Visitors to Museums." *The International Journal of Museum Management and Curatorship* 17 (2): 142.
[14] Coburn, Erin, and Murtha Baca. 2004. "Beyond the Gallery Walls: Tools and Methods for Leading End-Users to Collections Information." *Bulletin of the American Society for Information Science and Technology* 30 (5): 15.

the information—such as identifying specific user groups and creating access points and

controlled vocabularies—tend to fall by the wayside.[15]

User-Centered Description

In *Museums and the Interpretation of Visual Culture*, Hooper-Greenhill discusses

broad changes to the (art) museum paradigm in the nineteenth and twentieth centuries:

the modernist museum which dominated until the 1970s understood its audience as

"receivers of knowledge, empty vessels to be filled."[16] Information about objects was

one-directional, passed from the curator and other museum staff to explanatory wall

panels to the viewer, who was "rarely defined beyond the catch-all 'general public'."[17]

Lately the audience is being reconceptualized, broken down into differentiated groups of

users with diverse needs and perspectives. In the "post-museum" of recent decades, the

specialized knowledge provided by museum professionals remains important, but is

increasingly integrated with the voices of non-specialists.[18] Trant writes of an emerging

tension between the "knowledge of the collections that the museum creates, and

knowledge that is created [externally]."[19] In a digitally connected world, museums are no

longer the sole producers of knowledge about their collections; they should instead make

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[15] Coburn, Erin, and Murtha Baca. 2004. "Beyond the Gallery Walls: Tools and Methods for Leading End-Users to Collections Information." *Bulletin of the American Society for Information Science and Technology* 30 (5): 15.
[16] Hooper-Greenhill, Eilean. 2000. *Museums and the Interpretation of Visual Culture*. New York: Routledge. 125.
[17] Ibid. 132.
[18] Hooper-Greenhill, Eilean. 2000. *Museums and the Interpretation of Visual Culture*. New York: Routledge. 142-3.
[19] Marty, Paul F. and Katherine Jones. 2008. *Museum Informatics : People, Information, and Technology in Museums*. New York: Routledge. 277.

an effort to collect and manage outside knowledge of their collections along with their own documentation.

One effort made by museums to incorporate non-expert voices into collections records is the 'folksonomy', a social tagging system which allows users to contribute information about objects through short, single-phrase tags. The majority of social tagging studies focus on art objects, which often have clearly identifiable subject matter and thus lend themselves to inexpert tagging. Social tagging systems do not target specific user groups; rather they allow undefined (and often anonymous) users to make contributions to an object's record. Krystyna Matusiak's comparison of social tags in Flickr photo collections and a digital image collection produced by the University of Wisconsin-Milwaukee Libraries, an early study of the folksonomy trend, found that the tags generated by users were inconsistent in their accuracy and level of description; however, the tags were reflective of the natural language of the users and fostered greater engagement with the object surrogates.[20] More recent studies have come to similar conclusions. Chae and Kim argue that folksonomies contain significant lexical ambiguities due to their unstructured nature; the flaws increase as participation increases.[21] Susan Cairn's case studies of folksonomies in museum settings found that though folksonomies are messy and inconsistent, the practice links specialists and non-specialists together in an act of co-creation in which both parties become invested in the knowledge created. Cairns points out, however, that social tagging alone "cannot

[20] Matusiak, Krystyna K. 2006. "Towards User-centered Indexing in Digital Image Collections." *OCLC Systems & Services: International Digital Library Perspectives* 22 (4): 289, 295.
[21] Chae, Gunho and Jungwha Kim. 2011. "Rethinking Museum Management by Exploring the Potential of Social Tagging Systems in Online Art Museums." *International Journal of the Inclusive Museum* 3 (3): 131–40.

mutualize museum knowledge."[22] Non-specialist access to museum collections can be improved using alternative techniques, such as consultation cataloging, that engage diverse user groups while maintaining standards of accuracy and consistency.

Some studies have focused on tailoring their object records to the needs of specific non-specialist groups. One study, lasting from 1995 to 1997, examined a project called the Museum Educational Site Licensing Project (MESL). The effort was a collaboration between seven cultural heritage repositories and seven universities which made object records available to educational audiences online. The project found that, despite their intentions to design the catalogs for specific educational audiences, extending access to collections catalogs beyond the traditional analog user groups results in a less definable user base; it also found that the "lack of descriptive metadata for subject access and the lack of standardization" frustrated users.[23] Stephenson's suggestion is that the characteristics of the intended user group should be articulated as clearly as possible and the assumptions about that group be built into the documentation.

Cameron's study of the *Themescaping Virtual Collections* project profiled four broad user groups of the museum collection: curators, collection managers, educators, and non-specialists.[24] The study found that educators and other non-specialists were more comfortable with some degree of authority in the records; they were not willing to take full responsibility for the interpretative process and expected the museum to provide

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[22] Cairns, Susan. 2013. "Mutualizing Museum Knowledge: Folksonomies and the Changing Shape of Expertise." *Curator* 56 (1): 116.
[23] Stephenson, Christie. 1999. "Recent Developments in Cultural Heritage Image Databases: Directions for User-Centered Design." *Library Trends* 48 (2): 425.
[24] Cameron, Fiona. 2003. "Digital Futures I: Museum Collections, Digital Technologies, and the Cultural Construction of Knowledge." *Curator* 46 (3): 330.

"trustworthy, authoritative, and meaningful scholarly information."[25] This conclusion

contradicts the use of folksonomies, which rests on the assumption that non-specialist

users prefer greater control over the description of objects.

Several researchers have sought to bridge the gap between folksonomies created

by the masses and traditional object records created by the museum professional.

Srinivasan et al. discuss several case studies of anthropological museums and their

collaborations with indigenous cultures. The authors found that traditional documentation

practices, particularly standardization such as controlled vocabularies, inherently restrict

intellectual control to professionals. The frenzy among museums to adopt Web 2.0

technologies exacerbates this problem, as collections catalogs are "stripped of multiple

meanings in this rush to digitize and enable 'universal access' and interoperability."[26]

Rather, museums should consider "consultation cataloging", wherein source communities

are brought in as consultants and their diverse perspectives recorded as supplements to

the traditional record.[27] In a similar study, the researcher consulted with middle and high

school teachers on the design of a domain-specific ontology to provide access to a

collection of digitized primary materials for educational purposes.[28] The study found that,

due to the consultation process before the design was implemented, the model

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[25] Cameron, Fiona. 2003. "Digital Futures I: Museum Collections, Digital Technologies, and the Cultural Construction of Knowledge." *Curator* 46 (3): 336.

[26] Srinivasan, Ramesh, Robin Boast, Jonathan Furner, and Katherine M. Becvar. 2009. "Digital Museums and Diverse Cultural Knowledges: Moving Past the Traditional Catalog." *The Information Society* 25 (4): 266.

[27] Ibid. 276.

[28] Pattuelli, M. Cristina. 2011. "Modeling a Domain Ontology for Cultural Heritage Resources: A User-Centered Approach." *Journal of the American Society for Information Science & Technology* 62 (2): 316.

represented the teachers' searching and browsing needs and the data met their expectations.

In 2008, the Society of Architectural Historians (SAH), in collaboration with Artstor, developed an online library of architectural and landscape images for research and teaching, called SAHARA (SAH Architecture Resources Archive).[29] Scholars in a variety of interdisciplinary fields are invited to contribute images and descriptive information to the collection. The Society of Architectural Historians provides guidelines for cataloging and the submissions are peer-reviewed for accuracy and consistency. In their discussion of the project as it relates to the *Cataloging Cultural Objects* manual, Coburn et al. state that the "expertise of the scholars who contribute to SAHARA will inform the cataloging and accessibility of the images and will result in high-quality metadata."[30] The authors noted that the contributing scholars were not aware of existing cataloging standards and there was concern among project leaders that implementing standards such as Cataloging Cultural Objects would not be domain-specific enough to facilitate search and retrieval for scholars. Their goal was to "strike a balance between encouraging scholars to become engaged in the process…and making the process less burdensome."[31] Consultation cataloging and other collaborative models exemplified by these projects accommodate both specialist and non-specialist user needs and could have significant bearing on the future of museum cataloging. In designing this current study,

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[29] "SAHARA: A Digital Archive of Architecture Images." *Society of Architectural Historians*. http://www.sah.org/publications-and-research/sahara.

[30] Coburn, Erin, Elisa Lanzi, Elizabeth O'Keefe, Regine Stein, and Ann Whiteside. 2010. "The Cataloging Cultural Objects Experience: Codifying Practice for the Cultural Heritage Community." *IFLA Journal* 36 (1): 22.

[31] Coburn, Erin, Elisa Lanzi, Elizabeth O'Keefe, Regine Stein, and Ann Whiteside. 2010. "The Cataloging Cultural Objects Experience: Codifying Practice for the Cultural Heritage Community." *IFLA Journal* 36 (1): 23.

the author sought to emulate such models by interfacing with specific potential user groups.

One recent study has acknowledged the lack of attention paid to researchers and scholars as potential users of museum records. In "Images on Museum Websites: Examining the Disconnect between User Expectations and the Current Reality", Vela describes her study of the information needs of Canadian scholars conducting academic research using Classical material culture held in museum collections.[32] Though the research focused largely on the image-oriented needs of this user group, the author's discussion of the dismissal of researchers as an important user group is noteworthy. Vela finds that the exclusion of scholars as a "targeted user group" has been justified in two ways: the presumption that scholarly researchers and curators have essentially the same needs and thus benefit from the same information about an object, and the perception that non-curatorial researchers are an insignificant minority of users and thus not worth the trouble of acknowledging.[33] However, Vela found that data collected from museum websites and surveys demonstrates that scholars may actually "represent conservatively between 10 and 25 percent of the users of museum websites."[34]

Research on object documentation in cultural heritage institutions has largely focused on describing art objects for traditional user groups, though recently attention has shifted to diverse user groups such as online visitors to museum websites or K-12 teachers and students. Research on user-centered description of historical artifacts—

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[32] Vela, Sarah. 2014. "Images on Museum Websites: Examining the Disconnect between User Expectations and the Current Reality." Shift: Graduate Journal of Visual and Material Culture, no. 7.
[33] Ibid., 3.
[34] Ibid., 5.

rather than art objects or digitized materials—makes up only a small portion of the literature and leaves an opportunity for additional study. This study seeks to help fill that gap by exploring user-centered description on a small scale in the context of a small historical collection. Much research has been done about how to make object records accessible to users beyond the museum once they have been created, particularly online, but that discussion is outside the scope of this paper.

III. Methodology

The Charles Kuralt Learning Center

The Charles Kuralt Learning Center was established in 2000 by the School of Journalism and Mass Communication at UNC-Chapel Hill. Located in its own secured room in Carroll Hall, the learning center houses the contents of broadcast journalist Charles Kuralt's New York City office. A Wilmington, North Carolina native, Kuralt attended the UNC-Chapel Hill and became the editor of *The Daily Tar Heel* in 1954. The majority of his career was spent at CBS as a correspondent and anchor on a variety of news programs. He is best known for his CBS Evening News segment "On the Road."[35] The collection was bequeathed to the school by Charles Kuralt's widow, Suzanne "Petie" Baird Kuralt, following his death in 1997.[36] The Charles Kuralt Learning Center contains a wide range of artifacts from Kuralt's career: Emmys awarded during his tenure at CBS News, photographs with colleagues, letters from friends, books, art, and other memorabilia.

The Kuralt Learning Center collection is significant not only because it is a unique collection of the working life of a well-known figure in journalism, but also

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[35] Hamilton, Stacey. 2000. "Kuralt, Charles." *American National Biography Online*. February. http://www.anb.org.libproxy.lib.unc.edu/articles/16/16-03405.html.
[36] "Charles Kuralt Learning Center." 2014. *UNC School of Journalism and Mass Communication*. http://jomc.unc.edu/special-programs-content-items/charles-kuralt-learning-center.

because the objects have been neither inventoried as a collection nor individually

documented. At the time of its creation, the room was intended to preserve Charles

Kuralt's legacy by providing an educational center for future generations of journalism

students and the general public. However, the center is rarely used as a supplementary

tool for students and scholars conducting research on Charles Kuralt or his

contemporaries, despite its close proximity to an extensive collection of Charles Kuralt's

personal papers on the same campus in the Southern Historical Collection at Wilson

Special Collections Library.[37]

Surrogate Records

     The focus of this research is the researcher as a potential user of a collection and

their interaction with both an historical object and its descriptive record. Because the

Kuralt Learning Center collection has not been documented, conducting this study

required creating basic descriptive records for a group of five objects: a photograph and

fabric patch mounted and framed together, an induction certificate from a special society,

a display of fly fishing lures, a framed caricature of Charles Kuralt, and a marble and

brass award. The objects were described following guidelines outlined by *Cataloging

Cultural Objects: A Guide to Describing Cultural Works and Their Images* (CCO).[38] The

descriptive fields included: object name, creator and acquisition information, physical

characteristics, and subject matter. (See Appendix A for object records.)

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[37] The Charles Kuralt Collection #4882, Southern Historical Collection, The Wilson
Library, University of North Carolina at Chapel Hill.
http://www2.lib.unc.edu/mss/inv/k/Kuralt,Charles.html#d1e107.

[38] Baca, Murtha, Patricia Harpring, Elisa Lanzi, Linda McRae, ad Ann Baird Whiteside.
2006. *Cataloging Cultural Objects : A Guide to Describing Cultural Works and Their
Images*. Chicago: American Library Association.

Data Collection

Six semi-structured interviews were conducted over three weeks. More than surveys or highly structured interviews, semi-structured interviews allow participants to express complex, hypothetical ideas and uncertainty. The hypothetical nature of this research presented a challenge to the interview process, as the interviewees were not familiar with the collection at hand. Nevertheless, one advantage of the semi-structured interview format was that it allowed the researcher to further clarify questions or prompt participants in another way, "increasing the likelihood of useful responses."[39] The researcher carefully considered the structure of the interview so that it guided the interviewees to meaningful, clear responses. Too much flexibility, even in an intentionally loosely structured interview, can result in inconsistent responses that will be difficult to analyze.[40]

Two different populations of potential users of the Kuralt collection materials were recruited: three participants with subject knowledge (defined here as scholarly knowledge of journalism practices and journalism history in the United States), and three participants with general organizational knowledge (defined here as familiarity with organizational structures of informational records). Participants in the subject knowledge group were recruited from School of Journalism and Mass Communication at UNC-Chapel Hill. Participants in the organizational knowledge group were recruited from the School of Information and Library Science at UNC-Chapel Hill. Participants were recruited primarily via master's program listservs in both schools. (See Appendix B and Appendix

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[39] Frechtling, Joy. 2002. "The 2002 User-Friendly Handbook for Project Evaluation." *National Science Foundation*. http://eric.ed.gov/?id=ED468812. 51.
[40] Ibid.

C for recruitment emails and consent forms.) Enrollment in a master's program was required for participation as the researcher felt it was important to interview subjects with similar levels of education in their respective fields.

The interviews were conducted in the Charles Kuralt Learning Center. Steinar Kvale warns that researchers should carefully consider setting selections and briefing practices before an interview and the effect these factors can have upon "the knowledge produced in the interview."[41] The decision to conduct the interviews in the Charles Kuralt Learning Center was intended partly to ensure the safety of the objects by minimizing their movement. It also provided some additional context about Charles Kuralt and the collection for the participants.

The researcher briefly explained the purpose of the research to the participant and introduced the collection. The researcher avoided providing too much background information about the collection so that participant responses would not be influenced by that information—particularly concerning for the acquisition fields in the descriptive records. The researcher wanted to assess how the user interacted with the surrogate record based on their pre-existing knowledge. The short introduction allowed the participants to become sufficiently familiar with the collection to consider hypothetical situations posed in the interview, but did not provide them with leading information about specific objects beforehand. The researcher then asked the participant to examine five objects, and describe each of them aloud in as much detail as they desired. The participants then examined the descriptive records for each object as the researcher prompted them to discuss the differences between their description of the object and the

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[41] Kvale, Steinar. 2007. *Doing Interviews [electronic resource]*. London: SAGE. 64.

information contained in the record. All participants examined the same group of objects. (See Appendix D for interview questions.)

The audio of the interviews was recorded on a portable recording device; the contents of the device were transferred to a secure folder on a password-protected computer immediately following each interview. The researcher then transcribed the interviews into text documents. Interviews lasted between 14 and 35 minutes. Other than the departmental affiliation and education level of the participant, no identifying personal information was recorded.

Limitations of the Study

The researcher anticipated that asking participants to consider hypothetical situations in which they might use the collection for different kinds of research might result in vague, uncertain responses that would be difficult to analyze. To mitigate this problem, the researcher provided additional context for the objects by placing them in the larger collection. Additionally, instead of asking the interviewee to think of a hypothetical research situation on their own, the researcher suggested a simple situation for the interviewee to discuss: researching the life of Charles Kuralt for a biography.

As a graduate student in the master's program at the School of Information and Library Science, the researcher has a great deal of knowledge about information organization. The researcher also has experience using descriptive records to research historical objects, as well as some subject knowledge of journalism and mass communication. With the researcher's background in mind, the interview questions were

carefully structured to avoid leading participants with the researcher's preexisting knowledge of the collection.

Data Analysis

The goal of this study was to compare the interview responses of the two populations against each other, using SILS participants as a control group of users without subject knowledge. The researcher coded and analyzed the responses with certain questions in mind: Do the groups have different expectations of the record? Do they have the same expectations? How do their responses differ? How are they the same? From this comparison, the study will discuss strategies for meeting the information needs of specific potential users of the collection.

IV. Results

Background Questions

All six interviewees reported being either first- or second-year graduate students at the University of North Carolina-Chapel Hill (Appendix D, question 1). One SILS interviewee was a first-year graduate student; the other two were second-year students. Similarly, one JOMC interviewee was a second-year graduate student; the other two were first-year students.

All interviewees reported having used historical objects to conduct primary research (Appendix D, question 2). One SILS interviewee had used the archives of a non-profit institution, while the other two SILS interviewees had used special collections or archives at large research universities. All three JOMC interviewees had used special collections or archives at a large research universities.

One JOMC interviewee answered that they were familiar with the life and/or career of Charles Kuralt (Appendix D, question 3a). All other interviewees had no previous knowledge of Charles Kuralt. When asked if they were familiar with the history of broadcast journalism, all three SILS interviewees stated that they had little or no knowledge of the topic (Appendix D, question 3b). Two JOMC interviewees stated that they did have knowledge of broadcast journalism history, while one JOMC interviewee did not.[42]

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[42] This interviewee, JOMC 3, reported that their specialty was business and media.

Describing Objects: SILS Interviewees

When asked to describe the five sample objects aloud, the SILS interviewees focused on the physical aspects of the objects to varying degrees. The first interviewee, SILS 1, described the objects in extensive detail, with particular emphasis on textual elements, imagery, and framing and mounting. SILS 1 also noticed markings on the objects not part of the object itself, such as framer's stickers and moving inventory markings. This required that the interviewee turn over the object or otherwise examine it from all angles, a possibility which was suggested to all interviewees at the beginning of the interview (few of whom took the initiative to do so). SILS 2 and SILS 3 described the physical characteristics in significantly less detail, though SILS 2 did pay particular attention to the size and shape of objects. SILS 3 primarily focused on the textual details of the five objects.

All three SILS interviewees described the subject matter of the objects in similar detail. Each interviewee stated aloud the salient subject matter which the researcher expected participants to pick out: Charles Kuralt and the Plaisted Polar Expedition (Object 1); the Society of the Prodigal Son (Object 2); flyfishing lures and John Voelker (Object 3); Charles Kuralt (Object 4); and the Allen H. Neuharth Award (Object 5). The interviewees also noticed other minor details, such as the tongue-in-cheek nature of the text of the Society of the Prodigal Son certificate and the fact that the patch worn by Charles Kuralt in the photograph matched the patch mounted above the photograph (Object 1).[43]

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[43] SILS 2 and 3.

All of the SILS participants expressed uncertainty about certain aspects of objects. In many cases, the interviewees used contextual evidence and assumptions to mitigate their uncertainty. For example, when examining the photograph of Charles Kuralt on assignment in Canada (Object 1), all three participants used the contextual evidence provided by the Plaisted Polar Expedition patch to guess that the photograph documented a polar climate. SILS 2 and SILS 3 correctly guessed that the man portrayed in the pen-and-ink caricature (Object 4) was Charles Kuralt, based on the accessories pictured in the drawing (a typewriter and glasses) and their limited knowledge that Charles Kuralt was some type of journalist. SILS 1 did not explicitly state that the man pictured in the caricature might be Charles Kuralt, though she did notice a large reproduction of the same drawing hanging on the wall of the Charles Kuralt Learning Center.

One SILS interviewee quickly began to draw comparisons between the objects provided. The interviewee noticed that each object had on the back a small circular white sticker with a handwritten number, though they stopped short of hypothesizing the origin or purpose of the stickers. They did theorize, however, that the faded and brittle appearance of the stickers might indicate their age.[44]

Describing Objects: JOMC Interviewees

Compared to the SILS interviewees, JOMC participants placed relatively little emphasis on the physical characteristics of the objects in their initial descriptions. JOMC participants inconsistently acknowledged the size and shape of objects and infrequently noticed added markings such as framer's stickers and moving inventory notes. All three

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[44] SILS 1.

JOMC participants noted dates or date ranges for each of the five objects, an aspect which was less consistently acknowledged among the SILS participants.

JOMC participants expressed more interest in subject matter than SILS participants. The JOMC interviewees consistently acknowledged salient subject matter, such as portrayals of Charles Kuralt (Objects 1 and 3). They also spent more time discussing possible subject matter for each object, such as the Society of the Prodigal Son (Object 2) and the list of past honorees on the Allen H. Neuharth award (Object 5). JOMC 3 expressed significant interest in events as subject matter, such as the Plaisted Polar Expedition (Object 1) and the initiation ceremony associated with the Society of the Prodigal Son certificate (Object 2).

All three JOMC participants expressed uncertainty while describing the objects. Like the SILS participants, the interviewees often used contextual evidence and assumptions to mitigate that uncertainty. This was particularly evident when the interviewees described the Society of the Prodigal Son certificate (Object 2). Two of the JOMC interviewees initially expressed unfamiliarity with the Society of the Prodigal Son, but used contextual evidence in the rest of the document to hypothesize the purpose of the society.[45] Both interviewees posited that the Society of the Prodigal Son was an organization either initiated or managed by the Governor of North Carolina to recognize contributions made to North Carolina by people who reside elsewhere, in the hope that they will eventually return to their native state. The interviewees also made other assumptions about the objects based on contextual evidence: the recurring nature of the Allen H. Neuharth award based on the list of past honorees (Object 5); that the Neuharth

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[45] JOMC 1 and JOMC 3.

Award for Excellence in Journalism was specifically for broadcast journalism based on

the list of past honorees and preexisting knowledge of the field (Object 5); and

identifying portrayals of Charles Kuralt based on accessories (Objects 1 and 4). [46][47][48]

Two of the three JOMC interviewees drew comparisons between objects in the

group. JOMC 1 noticed that Object 2 probably predated Object 1 and wondered why they

were not in chronological order. Later, when describing the fly fishing lures display

(Object 3), the interviewee questioned why the object was part of the grouping because it

seemed like an outlier. JOMC 3 stated that Object 2 appeared to be a more official

document than Object 1 based on the quality of the matting and framing, whereas Object

1 may have been framed to commemorate a personal achievement.

Evaluating Records: SILS Interviewees

When asked to point out useful information in the sample object records, both

SILS 2 and SILS 3 stated that they found the physical description of the object useful for

confirming unclear text or subject matter, such as the object held by the sculpted figure in

Object 5 (a flame). SILS 2 and SILS 3 also expressed excitement over the title of Object

3 ("Fly fishing lures") because, as they both stated, the object was confusing and not self-

evident. Other useful aspects of the surrogate records included the acquisition

information, which one interviewee said could potentially help them trace the history of

the collection as a whole; date information, which confirmed assumptions made during

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[46] JOMC 1 and JOMC 2.
[47] JOMC 3.
[48] JOMC 1 and JOMC 2.

the description portion of the interview; and constituent information, particularly relating to the artists/creators of Objects 4 and 5.[49]

When asked which aspects of the surrogate records were not useful in a hypothetical research situation, SILS 1 expressed concern that the physical descriptions of the objects assumed that the user had already seen the objects and were not sufficiently detailed to be useful without the actual object present. Two interviewees were initially confused by the constituent field of the records, particularly when viewing the first record (Object 1), in which the constituent value is null.[50] One of these interviewees stated that they better understood the field once they reached Objects 2 and 4, in which the constituent field lists a name followed by a relationship to the object.[51] SILS 3 also considered the "Memorabilia" item type to be a catch-all for miscellaneous objects and not useful for research purposes. SILS 3 also expressed concern over the subjects for Objects 2 and 5, in which the givers and/or namesakes of the awards were listed as subjects. According to the interviewee, adding Terry Sanford (the giver of Object 2) as a subject created a "false parallel" between the three subjects, as if they were all of equal importance, which was misleading. Both SILS 2 and SILS 3 repeatedly referred to the subject field as "access points" for searching.[52] SILS 2 recommended adding the name of the artist as a subject in Object 4 in order to facilitate searching for other information about or works created by that artist.

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[49] SILS 1.
[50] SILS 1 and SILS 3.
[51] SILS 1.
[52] The interest in access points for searching both within and outside of the Charles Kuralt collection may be an interest peculiar to students and professionals in the library and information science discipline. None of the three JOMC interviewees discussed subject matter in terms of search accessibility.

Interviewees were also asked to make suggestions about potential additions to the records, either in existing fields or new fields. Both SILS 1 and SILS 3 stated that the constituents field needed to be improved, either better explained or removed altogether in records where the field was not applicable. SILS 2 was interested in adding physical description details about the color of objects, particularly the black-and-white photograph in Object 1 and the black line drawing in Object 4. All three interviewees were interested in adding contextual information about the purpose and origin of the objects. They were particularly interested in knowing more about the Plaisted Polar Expedition (Object 1), the Society of the Prodigal Son (Object 2) and the identity of both John Voelker and "Gigs" (Object 3).

Evaluating Records: JOMC Interviewees

When asked to discuss what aspects of the records were useful, all three JOMC interviewees stated that the physical descriptions were useful for confirming dates and unclear text. JOMC 1 and JOMC 2 expressed that the constituents field was useful for identifying people related to the object, particularly artists for Objects 4 and 5. Two of the three interviewees appreciated the physical description and title of Object 3 which identified the object as flyfishing lures.[53] Two interviewees were pleased that the handwritten note on the underside of Object 3 was transcribed in the physical description, either because they could not read the text themselves or because they were interested in the fact that the cataloger was also unable to identify the author of the note, "Gigs".[54] JOMC 2 stated that the physical description of Object 4 was useful for identifying the

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[53] JOMC 1 and JOMC 3.
[54] JOMC 1 and JOMC 2.

material of the object (pen and ink on paper), because "that is always something that you would want to know—what type of material was used."

When asked to identify aspects of the surrogate records that would probably not be useful for research, all three JOMC interviewees pointed to the item type field. JOMC 1 admitted that they did not understand the purpose of the item type and that they could not see how it would assist them in primary research. JOMC 2 wanted a better explanation of the purpose of the field and the meaning of "Memorabilia" in the context of the collection. JOMC 3 stated that the field seemed redundant because they would be able to determine the item type from looking at the physical description. Neither JOMC 1 nor JOMC 3 considered the acquisition information (particularly the acquisition date) useful for primary research. JOMC 1 found the physical descriptions of many objects overly technical and did not see the usefulness of the dimensions of the objects from a research perspective. Interestingly, JOMC 3 found the object dimensions useful, but only if rendered in three dimensions "to get the full impact of the size of the object" without viewing it in person. JOMC 1 did not find the "John Voelker" subject useful for Object 3 without more contextual information. JOMC 2, conversely, extracted contextual information from the same subject line, noticing that John Voelker was a writer and fisherman, which the interviewee thought began to explain the relationship of the object with the rest of the Charles Kuralt collection.

When asked to discuss missing information in the records, all three interviewees were primarily interested in adding contextual information about subject matter, particularly the Plaisted Polar Expedition (Object 1), the Society of the Prodigal Son (Object 2) and the identity of John Voelker (Object 3). JOMC 3 expressed concern that

the physical descriptions were not consistent across all of the records, particularly for framed and matted objects. The interviewee also stated that they would like to see additional broader subject terms for certain objects, such as "North Carolina" for the Society of the Prodigal Son certificate (Object 2). This interest in more generalized subject matter for objects aligns with the findings of Mastusiak's analysis of folksonomies: natural language tagging fostered user engagement with object surrogates as familiar subject terms allowed the users to better comprehend the object record as a whole.[55]

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[55] Matusiak, Krystyna K. 2006. "Towards User-centered Indexing in Digital Image Collections." *OCLC Systems & Services: International Digital Library Perspectives* 22 (4): 289, 295.

V. Discussion

Contextualizing Objects

A major theme that persisted throughout all the interviews can be summed up in the words of one SILS interviewee: "[The objects] are adequately described, but I don't have any way of understanding what [the items] are… There's a story embedded in this thing that I'm not familiar with and I can't access it [from these records]."[56] Both SILS and JOMC interviewees alike expressed the desire to know more about the context surrounding the objects; the surrogate records often failed to provide them with the information they were seeking. One JOMC interviewee stated that they felt the records were probably sufficient for a museum curator or a similar professional, but they were minimally useful for research purposes.[57]

The desire to learn more about the context of the object from its surrogate record is similar to the findings of Cameron's study of the *Themescaping Virtual Collections* project. Cameron concluded that non-specialists were more comfortable with authoritative records which provide significant interpretation of the meaning or origin of the object, rather than records that leave the interpretation of the object up to the user.[58] Interestingly, the JOMC participants all expressed the desire to see more interpretation in

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[56] SILS 3.
[57] JOMC 1.
[58] Cameron, Fiona. 2003. "Digital Futures I: Museum Collections, Digital Technologies, and the Cultural Construction of Knowledge." *Curator* 46 (3): 330.

the surrogate records (which they called "context") despite the fact that two of the three participants had some degree of specialized subject knowledge.

JOMC interviewees expressed the desire to understand the purpose of the objects—were they intended to be commemorative, such as the Allen H. Neuharth award (Object 5)? Were the personal items given as gifts between friends, such as the flyfishing lures display or the caricature of Charles Kuralt (Objects 3 and 4)? They were also highly interested in the relationships between people and the impact those relationships had on the collection. How was Petie Kuralt, the giver of the entire collection, related to Charles Kuralt? One JOMC interviewee knew that Petie Kuralt was Charles Kuralt's longtime spouse and was therefore able to comment on the nature of the donation to the School of Journalism and Mass Communication. Similarly, if the user understood the connection between Charles Kuralt and John Voelker, they might better understand the role of the flyfishing lures display in the collection as a whole, and thus its place in Charles Kuralt's life. Contextual evidence like this is crucial during primary research for understanding the broad picture.

Relationships between Records

Another persistent theme in the interviews was the relationship between records. Nearly every interviewee expressed a desire to see more consistency between surrogate records provided for each object. If one framed and matted object was described as "framed and matted" in the physical description field, another like object should be described in the same manner. The participants' frustration with inconsistency mirrored the frustrations of users in Stephenson's study of cataloging for educational audiences;

Stephenson's suggestion for mitigating this frustration was that the needs of select user groups be articulated early and built into the documentation of the cataloging system.[59] Consistent and accurate description practices that meet the needs of the anticipated audience not only aid visual identification of the objects, but also serve to increase the user's confidence in the accuracy of the other information provided by the record.

Looking at a series of records together also helped the interviewees better understand individual fields. The first surrogate record encountered by the interviewees left the constituent field null. Most interviewees acknowledged the field, but stated that they did not understand its purpose. It is only when they saw another record with the same field filled in that they began to understand its meaning.[60] This suggests that viewing multiple records for a collection can provide internal context that serves to fill gaps in the user's understanding, even when the user has significant subject knowledge. Records viewed alone may be less useful to a researcher.

Confirmation, Validation, and Authenticity

The final major theme running through the interviews was the confirmation of information. During the verbal description portion of the interviews, participants frequently stated aloud that they were making guesses or assumptions about the subject matter or other aspects of the objects. One of the major benefits of the descriptive records as reported by the participants was that the record confirmed some or all of their earlier assumptions. The interviewees stated that the records were particularly useful for dates,

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[59] Stephenson, Christie. 1999. "Recent Developments in Cultural Heritage Image Databases: Directions for User-Centered Design." *Library Trends* 48 (2): 425.
[60] JOMC 3.

names, events, and other subject matter, especially when that information was difficult to read on the object itself. Unlike contextual notes, this type of information does not necessarily add any value to the object that is not already present, but it does validate the user's research and perhaps make their work easier.

The JOMC participants were also particularly interested in the authenticity of objects. Each JOMC interviewee either questioned or simply discussed the authenticity of at least one of the objects during the description portion of the interviews. JOMC 1 noted that the Society of the Prodigal Son certificate (Object 2) included an official seal and a "legitimate" signature by Terry Sanford, the Governor of North Carolina, which indicated to the interviewee that the object was not "fake". JOMC 3 discussed the same aspects of Object 2 in terms of its authenticity. JOMC 2 noted that Object 2 looked "more official" than Object 1 because of the same official seal and signature. Only one SILS interviewee briefly discussed the authenticity of an object during the first portion of the interview.[61] Often the descriptive records authenticated the objects; one interviewee stated that they knew Object 1 was probably not a fake because the record stated it was acquired from Petie Kuralt, who the interviewee knew to be the wife of Charles Kuralt.[62] These results suggest that the existence of descriptive records serve to reinforce the legitimacy of a collection. It is not clear whether this is regardless of the quality or completeness of the records. Severely information deficient records may not legitimize a collection in the same way.

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[61] SILS 3, Object 2.
[62] JOMC 2.

VI. Conclusion

This results of this study suggest that, regardless of the subject expertise of a researcher, adequately describing objects independent of one another or a larger context is insufficient for the needs of many expert researchers, including but not limited to those in the journalism and mass communication discipline. The participants of this study, particularly JOMC interviewees, generally displayed less expert subject knowledge than anticipated. The design of the study was intended to focus on differences between two user groups, one with subject knowledge and one without. The JOMC participants provided some unique feedback, but the lack of advanced subject knowledge may have been a factor in the strong similarities between results for both participant groups. Future studies may consider focusing on subject experts at a higher level, such as doctoral students or faculty in a particular discipline.

This is not to say, however, that the needs of researchers using descriptive records for historical objects do not differ significantly. Indeed, the JOMC interviewees did express significantly more interest in the subject matter and context of objects, while focusing less on the physical characteristics of objects than did the SILS interviewees. The results of this study also suggest that, for journalism and mass communication subject experts, some of the most important roles of a surrogate record may be to provide significant contextual information about the object and its subject matter, confirm

assumptions and guesses made by the researcher viewing the object in person, and

legitimize the collection as a whole.

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Appendices

Appendix A: Object Records

OBJECT RECORD 1
TITLE: Kuralt on Polar expedition
ITEM TYPE: Memorabilia
ACQUISITION DATE: 1997
ACQUIRED FROM: Petie Kuralt
DESCRIPTION: Two objects mounted together and framed: photograph, Charles Kuralt
      with camera; patch from coat.
      CREATION DATE: ca. 1967
      MEASUREMENTS: 19 in. x 13 in.
      MATERIALS: Photograph
      INSCRIPTION: On patch: "Plaisted Polar Expedition – 1967"
SUBJECT(S): Charles Kuralt (journalist). Plaisted Polar Expedition (1967).
CONSTITUENT(S): None

OBJECT RECORD 2
TITLE: Society of the Prodigal Son certificate
ITEM TYPE: Memorabilia
ACQUISITION DATE: 1997
ACQUIRED FROM: Petie Kuralt
DESCRIPTION: Framed certificate, State of North Carolina Society of the Prodigal Son
      membership; awarded to Charles Kuralt.
      CREATION DATE: November 17, 1964
      MEASUREMENTS: 14 x 19 in.
      MATERIALS: Paper, wood, glass
SUBJECT(S): Charles Kuralt (journalist). Society of the Prodigal Son (North Carolina).
Terry Sanford (governor, North Carolina).
CONSTITUENT(S): Terry Sanford (giver).

OBJECT RECORD 3
TITLE: Flyfishing lures
ITEM TYPE: Memorabilia
ACQUISITION DATE: 1997
ACQUIRED FROM: Petie Kuralt
DESCRIPTION: Flyfishing lures, mounted on wood; encased in glass dome.
      CREATION DATE: ca. 1996
      MEASUREMENTS: 5 in. high.
      MATERIALS: Wood, glass, miscellaneous materials
      INSCRIPTION: Plaque: "John Voelker Collection"; note on underside of base:
      "All the best – Gigs [?] – 1996"
SUBJECT(S): John D. Voelker (writer, fisherman).
CONSTITUENT(S): None

OBJECT RECORD 4
TITLE: Kuralt caricature (original)
ITEM TYPE: Art
ACQUISITION DATE: 1997
ACQUIRED FROM: Petie Kuralt
DESCRIPTION: Caricature of Charles Kuralt with typewriter.
      CREATION DATE: ca. 1981
      MEASUREMENTS: 12.5 x 14 in.
      MATERIALS: Ink on paper
SUBJECT(S): Charles Kuralt (journalist).
CONSTITUENT(S): Al Hirschfeld (artist).

OBJECT RECORD 5
TITLE: Allen H. Neuharth award
ITEM TYPE: Memorabilia
ACQUISITION DATE: 1997
ACQUIRED FROM: Petie Kuralt
DESCRIPTION: Bronze sculpture mounted on marble base; sculpted human figure
      holding flame.
      CREATION DATE: 1994 (figural mold, 1989)
      MEASUREMENTS: 13.5 in. high.
      MATERIALS: Bronze, marble
      INSCRIPTION: Plaque: "1994 – Charles Kuralt – Allen H. Neuharth Award
      Excellence in journalism"
SUBJECT(S): Charles Kuralt (journalist). Allen H. Neuharth (journalist).
CONSTITUENT(S): Dale Claude Lamphere (artist).

Appendix B: Recruitment Email

Hello,

I am an MSLS student from the School of Library and Information Science at UNC-Chapel Hill. I am writing to invite you to participate in my research study about describing historical objects to meet the needs of researchers. All graduate students at the [*insert appropriate school*] are eligible to participate in this study, regardless of your experience with using historical collections for primary research.

This study will involve a brief interview session on campus (lasting approximately one hour) in which you will be asked to examine a series of historical objects and associated documents. I will audio record your responses. Participation in this study is completely voluntary and all responses will remain anonymous and confidential. This study has been reviewed by the Institutional Review Board at UNC.

If you'd like to participate or have any questions about the study, please contact me at slmerritt@unc.edu.

Thank you,

Shelby Merritt

Appendix C: Consent Form

Describing Historical Objects for Specific User Groups: **Lessons from the Charles Kuralt Learning Center**

During this interview you will be asked to examine a series of historical objects and associated documents designed to understand the needs of researchers using historical objects for primary research. This study has been approved by the Institutional Review Board at UNC-Chapel Hill.

This interview will last approximately one hour. Responses will be audio recorded. If there are any questions you would rather not answer or that you do not feel comfortable answering, please say so and we will stop the interview or move on to the next question.

This interview is anonymous. The audio recordings, transcripts, and associated data will be kept in a password-protected location on a secure computer. Only the primary researcher, Shelby Merritt, and the faculty supervisor, Denise Anthony, will have access to this information. Upon completion of this project, all data will be destroyed or stored in a secure location.

Participant's Agreement:
I am aware that my participation in this interview is voluntary. I understand the intent and purpose of this research. If, for any reason, at any time, I wish to stop the interview, I may do so without having to give an explanation.

The researcher has reviewed the purpose of this project with me. I am aware the data will be used in a master's paper that will be publicly available through the School of Information and Library Science. I have the right to review, comment on, and/or withdraw information prior to the paper submission.

If I have any questions about this study, I am free to contact the student researcher (Shelby Merritt, slmerritt@unc.edu) or the faculty adviser (Denise Anthony, anthonyd@email.unc.edu). If I have any questions about my rights as a research participant, I am free to contact the Institutional Review Board at UNC-Chapel Hill.

I have been offered a copy of this consent form that I may keep for my own reference. I have read the above form and, with the understanding that I can withdraw at any time and for whatever reason, I consent to participate in today's interview.

_____   _____

Participant's signature   Date

_____   _____

Researcher's signature   Date

Appendix D: Interview Questions

1. Are you a student at the University of North Carolina – Chapel Hill?
   a. What level?
   b. With which school are you affiliated?
2. Have you ever used historical objects or materials to conduct primary research?
   a. In museums? Archives? Special collections?
   b. For what field of study?
3. Are you familiar with Charles Kuralt? With the history of broadcast journalism?
4. Show participant object (1 of 5).
   a. Ask participant to describe object in detail, including physical characteristics and subject matter.
5. Repeat step #4 for each object.
6. Show participant corresponding descriptive record (1 of 5). Ask participant to think about how they described the object and compare their description to the surrogate record.
   a. Is the record missing potentially useful information?
   b. Does the record include irrelevant information?
   c. Does any information in the record need more explanation?
   d. Any other thoughts or observations about the record?
7. Repeat step #6 for each record.